

Customization and Configuration Services

by Jerry Rowland,
Vice President, Product Development
HR Systems Strategies Inc.

Customize info:HR?
Does that mean there are deficiencies in the system?
Not at all: after 17 years of widespread use across many companies and industries, all would agree that info:HR is a very full-featured system. What I'm talking about when I refer to customization is having us provide specific modifications so that info:HR can more completely represent the unique aspects of your HR process that you would like to capture in the system.

But this article is called "Customization & Configuration Services" – let's distinguish between the two.

I think of configuration as those changes made to info:HR in the normal course of setting it up for initial use.

Some of this you do yourself —Label Master and New Hire Procedure, for example. Some, we do for you—Initial Data Loads, ongoing interfaces to payroll, time/attendance and benefits, and special programming to implement collective agreement requirements. These are all normal and expected "changes".

But sometimes there are tasks you need to do in your HR process that are yours alone, and they aren't currently part of info:HR. This is where you can ask us to customize the system. We can help you make it your system; we can make the system match your process, rather than changing your process to fit an inflexible system.

Continued on page three

Happy New Year

and welcome to the first issue of *info* in 2009. 2008 was a very successful year for HR Systems Strategies and we are carrying this positive momentum into 2009—a year when we aim to focus on you, our customers, more than ever before. It all starts with regular and on-going contact with you whether its through this newsletter, an on site info:HR update meeting or a quarterly conference call with the HRSS support team to ensure you are getting maximum value from your use of info:HR. Inside this issue of *info* are examples of initiatives we have undertaken to support your efforts to meet the demands of your organization during what could be the most difficult economic period in our lifetime: From a product standpoint, we profile our ESS and Time Sheet modules which have been recently released for .NET. Many clients have implemented and found these to be tremendous time-savers in streamlining business processes; Jerry describes the Customization Services we provide which many clients have utilized and benefited from; and we continue to add to the HRSS team with experienced and capable people in support, product development, training and operations (see page three). It's shaping up to be an interesting year to say the least and we will be there every step of the way in supporting you with your HRIS needs. Please feel free to contact me with questions and comments at andys@infohr.com.



**Andy Staniewski, President,
HR Systems Strategies Inc.**

Employee Self Serve and Time Sheet Entry

By Michelle Beasley, Manager, info:HR Training, HR Systems Strategies Inc.

Are your employees currently filling out manual timesheets? Does HR produce monthly/quarterly reports with outstanding entitlements for each employee? How are supervisors managing vacation requests to ensure there is enough staff at any given time?

I would like to share with you some of the benefits of two web-based modules we offer and explain how they increase the workplace efficiency.

Automated Timesheets

If you are currently engaged in a manual time and attendance tracking system you are spending far too much time, which equates to cost, on a process that could so simply be automated. Do you have problems with timesheets disappearing on a desk full of papers, or being misplaced in the transfer from employee to supervisor to HR? With automated timesheets, employees are able to log in at their desktops, complete their timesheets, and then submit. Upon approval by their supervisor, entitlements are automatically updated. Your next question is, "We have various groups of employees with different entitlements, and so we need many different timesheets." The answer is simple: you can

create multiple templates with different attendance codes. This automated process allows for a much more efficient use of time by all members in the organization.

Employee Self Service

Now that you understand the implications of the automated time sheet, you are going to be even more captivated with the benefits of our Employee Self Service Module. The most common question HR receives from employees pertains to their outstanding Vacation, Sick, and any other additional entitlements. Each time a question like this is asked there is a disruption in work flow for both the employee and HR. Wouldn't it be great if you were able to eliminate these questions that could so easily be answered by the employees themselves? With the ESS Module, employees can sign in at any time and view their outstanding entitlements, demographics, emergency contacts, etc.

Another important aspect of this module is the **Vacation and Time Requests** option. We have simplified the approval process and created a common area for supervisors to manage and track employee schedules.

This allows supervisors to ensure departmental staff coverage levels are always maintained.

This merely scratches the surface of the capabilities and functionality of these two modules. Contact me at michelleb@infohr.com if you'd like to learn more.

Recently Implemented

One of Ontario's social services agencies has been using info:HR for over 14 years now. They recently implemented the Employee Self Service and Time sheet Modules to replace a manual time sheet tracking system. By switching to an automated system, hours of data entry have been eliminated and employees are able to view their up-to-date entitlements from their desks. The integration of these two modules is a benefit to the entire organization: employees no longer need to call HR inquiring about outstanding entitlements, attendance history or approved time requests. These modules foster a working environment that encourages employees to take pride in getting their time and attendance records submitted efficiently.

Visit HR Systems Strategies Inc. at the following events:

HRPA 09 Conference, Toronto, ON.....Jan 28-30
OMHRA Spring Workshop, Ottawa, ON.....Apr 22-24
Cdn Payroll Association Annual Conference, Victoria, BC.....Jun 9-10

Customization *cont'd from page one*
Examples of customizations we have done include creating custom reports, adding fields to screens, or even adding brand new screens. In each case, the client saw an opportunity to reduce manual effort and more completely model their HR environment by having us customize info:HR to meet their needs.

Consider customization as an iterative process —there will be refinements based on test feedback. And we find customization is more successful if we are involved in the design process; we can help avoid designs that are off the mark in regards to cost and effort, or that don't fit with the normal workings of info:HR.

Is there something you'd like info:HR to do that it doesn't today? Ask me at jerryr@infohr.com. We are always happy to discuss your customization requirements. Here's just one example:

The Catholic Children's Aid Society of Hamilton has been using info:HR for over 10 years. During that time, they have requested a number of customizations to meet their internal policies and procedures.

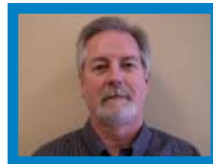
One recent request, to be used in conjunction with Employee Self Serve / Time Sheet Entries, was to generate an e-mail that would automatically go out weekly to all supervisors with employees who had unapproved time sheets outstanding.

Mark Galli, CCAS IT Manager, explains: "Time sheets are due in for approval each Monday at 10AM. Before the info:HR customization, supervisors had to make a note to themselves to check each employee's records to see if the previous week's time sheet was in. Now, thanks to the customization work we had done, it's all automated. An e-mail lands in each supervisor's mailbox telling them whose time sheets are missing. The supervisor can quickly follow up with each employee to resolve it."



Bill Kennedy presents a digital picture frame to Bernadette Hagan of Runnymede Healthcare Centre, our lucky prize draw winner at the November HealthAchieve2008 Conference in Toronto.

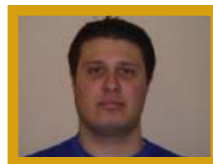
New faces at HR Systems Strategies Inc.



Bill Kennedy, our new Business Development Manager, joins us after several years running his own high tech sales and marketing consulting company. Bill is responsible for introducing info:HR to prospective clients, as well as acting as an initial point of contact for all sales-related inquiries.



Welcome to Michelle Beasley, Manager, info:HR Training. Michelle comes from the HR department of a children's aid society. Michelle will be responsible for conducting client training sessions in person and over the web, delivering product demonstrations, and fielding support calls.



Mostafa Hasheme, Senior Web Developer, brings experience gained at one of North America's leading integrated energy companies. Mostafa is responsible for developing info:HR web-based modules, completing custom modifications, and fielding support calls.



Robin Muir, CGA, joins us as Controller. Robin has over 15 years of financial and accounting experience in the software industry. Robin will be responsible for managing all the accounting functions at HR Systems Strategies Inc.

Welcome to the info:HR client community:
County of Frontenac, Glenburnie, Ontario
Delisle Youth Services, Toronto, Ontario
Township of Wilmot, Baden, Ontario
Wellington-Dufferin-Guelph Public Health, Fergus, Ontario

Notes from the info:HR Support Desk

By Hemu Mistry, Manager, Application Development and Support,
HR Systems Strategies Inc.

First of all HAPPY NEW YEAR and all the best in 2009!

In this edition I will talk about one of the most popular tasks in the HR & Payroll world around this time of the year, and that's YEAR END! Since info:HR keeps track of employee's vacation, sick and hourly entitlements, and overtime banked time, there is also a YEAR END process required in info:HR (This discussion assumes your entitlement period ends in December). The standard year end procedure involves the rolling over of the outstanding 2008 entitlements to 2009, computation of new 2009 entitlements and archiving of 2008 attendance records. These steps may vary from client to client depending on the organization's entitlement policies.

For more detailed information on the steps to carry out in the year end procedure, please visit our website, log in to our Support page under the Client Login link and download the "Sample Year End Procedure" documentation. If you require more information, please call our Support line at 1-800-567-4254.

FAQ

Q: Employee's Vacation entitlements and Sick entitlements comes up blank when viewed in "Days", but in "Hours" they show the correct entitlements. Why?

A: You are required to specify the Hours/Day on the employee's Position screen for the Current Position.

Q. Why is a red X showing on various codes lookups?

A: The user does not have security access on those codes. Have the Admin user go to the Setup\Security\Security Master screen and:

- highlight the User ID who needs access to those codes
- select Codes under More Security menu option (located at the top left corner of the screen)
- this screen has a list of all the code lookups used in info:HR
- give the user at least the "Inquire" right on the respective codes
- save the changes
- have the respective user log off info:HR and log back in for the change to take effect.

Useful Tips/Techniques:

In our last issue I had mentioned that there is more built-in functionality to record Overtime at straight time, time and a half, and at double time. This is done by recording the actual hours worked on the employee's Attendance screen against the predefined Attendance codes.

- For Straight Time, record against Attendance code prefixed "OT"
- For Time and Half, record against Attendance code "OT15"
- For Double Time, record against Attendance code "OT20"

Any time taken from the above banked time will have to be recorded against the Attendance code prefixed "CT", e.g. CT to record time taken, CTP to record time paid out.

Please call us at 1-800-567-4254 if you need any assistance with this functionality. You can also contact me directly at hemum@infohr.com.

Hope this section has been informative. See you in our next issue!

HR Systems Strategies Inc. (HRSS) develops, implements, and maintains info:HR, a proven high quality Human Resources Information System. info:HR provides customers at over 300 organizations in 12 countries worldwide with user-friendly, robust and adaptable software solutions for today's human capital resource management challenges.

Visit our website at www.infohr.com.

