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Answers and Insights for users of info:HR Software from HR Systems Strategies Inc.

Customers can download the latest info:HR patches from the HR Systems Strategies website at any time using the Client Login link. By Hemu Mistry.

Tips and Techniques: Downloadable patches

Who doesn't love summer? Taking a holiday, relaxing and recharging our batteries. Which brings me to the topic of our Tips and Techniques column: regularly recharging info:HR with **info:HR Patches.** Did you know that you can download the latest info:HR patches from our web site under the Support page at any time using our Client Login link?

We update our web site with the latest patches at least twice a month. These patches contain fixes and/or additional useful features. We recommend a regular download of the latest patches from our web site. It's easy; each download comes with installation instructions.

Although the latest patches are uploaded multiple times in a month, you don't have to keep up with all the patches. The info:HR patches are cumulative; if you download the patch, after two months, you will get all the fixes provided in those two months—you will not miss out on any fixes.

Also, if by any chance you are not up-to-date with our latest release, the download will bring you the latest product version, and you won't have to wait for our new release announcements.

Please call our Support line at 1.800.567.4254 to get login information to our Support page.

I hope this sheds some light on what info:HR can do for you! See inside for more Support tips.

Unique training requirements spur enhancements to info:HR Continuing Education and Work History Modules.

The product's extensibility and the user's expertise contribute to successful development project.

Customer inspires development of info:HR enhancements in Continuing Education and Training

The success of Friesens Corporation can be attributed in equal measures to people and technology. Friesens manufactures and ships full-colour hard- and soft-cover books for publishers all across North America; implementing the right business applications—for printing, shipping and warehousing—in the ever-changing book publishing world is important.

But it's the people who make things happen. At Friesens, the staff owns the company. With over 600 skilled employees at multiple locations, the techno-savvy Friesens managers know that implementing the right Human Resources management software is equally important.

Learning from experience

Friesens first adopted info:HR in 1999. Since then, they have become excellent info:HR users. They deduced that their unique training requirements could be met by extending the functionality provided in the info:HR Training and Continuing Education Module, and decided to work together with the development staff at HRSS to achieve this goal.

Each of Friesens' 600 employee positions has a number of specialized training requirements. Based on business needs, an employee may be scheduled to run different machines at different times. This multi-tasking makes up-to-date training—and tracking that training—essential. The complex environment is such that the Human Resources department needs to monitor employees and their different functions as well as training completed, training required and cross-training.

Friesens was looking for three main work improvements:

- First, to allow all training records to be accurately recorded and kept up-to-date.
- Second, to remind managers of recurring training requirements for workplace safety.
- Third, to improve efficiency in the HR Department by allowing for the automatic generation of commonly used forms.

Friesens contacted HR Systems Strategies Inc. to discuss implementing enhancements to the Continuing Education and Work History section of info:HR. Freisens had done their homework, and knew that they could rely on info:HR's extensibility to meet their needs.

"The staff at Friesens are experienced users of info:HR and were able to define the enhancements that would benefit their business," says Hemu Mistry, Manager of Application Development and Support at HR Systems Strategies Inc. "They were able to evaluate the Work History and Continuing Education sections of info:HR before providing us with their requirements and design suggestions. As a result, they are able to obtain maximum productivity from info:HR for their day-to-day business needs."

Extending the capabilities of info:HR

Developers wrote a custom enhancement to the Continuing Education section of info:HR. Friesens wanted to be able to track employees training requirements for:

- positions they are working in
- positions they were temporarily assigned to
- positions they were cross-trained for

Another enhancement under the Work History section of info:HR will keep track of employees:

- temporarily assigned
- cross-trained positions

Usually, the standard info:HR Required Course screen is used to record all the courses required by each position. For tracking employees' temporarily assigned and cross-trained positions, programmers developed a new Temporary/Cross Training Assignment screen (which is exactly like the employee's Position screen).

Defined Renewal Periods for Each Course

Renewal periods for each course are defined in order to keep track of when to retrain employees on a periodic basis. These renewal periods can be defined for position-dependent courses and for courses that are independent of positions. Friesens Human Resources staff identified two types of renewal periods:

- one for current & temporary/cross-trained position courses
- one for past position courses

Given that not all past position courses need to be renewed, the user has the option to flag which employee's past position course will be required for renewal. If a renewal period is not defined, the course does not need to be renewed.

Employee-specific Training Lists

Based on these renewal periods, the system generates an employee-specific Training List. The Training List lets info:HR users know what course(s) need to be taken for which positions, as well as the renewal dates and the course completion date (if the course has been taken before).

Here's how it works:

1. Employee completes a course.
2. User updates the Continuing Education screen with the course completion date.
3. The system automatically calculates the new renewal date (if the course needs to be renewed) based on the pre-determined renewal period.
4. The new renewal date is automatically updated in the employee's Training List. If the course does not require renewal, the system automatically removes the course from the employee Training List.

A course will not appear more than once on the Training List, if it is required by more than one position the employee is holding or held in the past (and is tracked for course renewal) unless the course renewal period is position-dependent.

There are times when a particular course is independent of the position the employee is working in or dependent on the location the employee is allocated to. These courses can be entered directly on the Training List by the user. If the system finds the independent course is actually required by one of the current, temporary, cross-trained or past tracked positions, then it automatically associates the position to it.

The Training List is also automatically updated when the course renewal period changes or a new course is assigned to or removed from the position.

Friesens continued

Automatic Follow-Up Record

For each of the renewal dates computed, a Follow-Up record is automatically created to alert users about upcoming training. When the training is completed, the Follow-Up record is automatically flagged as complete. Friesens managers are able to switch between department security and reporting authority on the Follow Up overview screen so that the user views only the Follow-Up records of the employees who are reporting to them.

Exportable Pre-Formatted MS-Word-Based Reporting

The enhancement allowed for the creation of several useful reports that equip management on the employee's training status, such as

- list of employees with positions
  - current
  - temporarily assigned
  - cross-trained and
  - past tracked for course renewals.
- list of employees by positions for which they have been
  - trained or cross-trained
  - and if they have completed the training on those courses.
- list of employees with
  - required course
  - renewal date
  - last course completion date
- list of courses required by the employees but not taken or if the renewal is overdue as of date provided by the user.

In addition, multiple document attachment features via direct link have been added on the Position Master screen. This allows Friesens to keep position information centralized so that info:HR users can see changes made to these documents immediately using the employee's Position screen.

With this collaboration, info:HR is able to generate various MS-Word reports for Friesens based on provided formats. Report forms are populated with info:HR data and are exported to user-defined locations on the network.

Accessing Enhancements Made Easy

"What this demonstrates is how easy it is to add functionality and modules to the base info:HR software. And this isn't the first time we have performed custom programming and extensions to info:HR," says Hemu Mistry. "This is a consulting service we offer to all of our clients. Sometimes it's just a case of the customer defining a need. Then we can step in and fill it by extending info:HR's capabilities."

At Friesens, the Human Resources department will be doing most of the data entry, with department heads and managers generating forms and reports. Department and shift managers will use the Follow-up Overview screen to help keep track of training obligations.

The generation of MS-Word forms has been rolled out completely for use by the HR department and departmental and shift managers. The task of data entry has begun for employee Continuing Education and Training, and, when completed, the HR department will communicate with managers to execute an improved workflow.

"Overall I am really pleased with the way the project management has proceeded," said Trish Rempel, software developer at Friesens. "info:HR Support staff have been diligent about understanding our business logic and requirements, and responsive in communications and in resolving issues. Working with them has been a pleasure!"

On the road with info:HR

Our own Michelle Beasley telling the info:HR story across the country

Michelle Beasley with 2009 HRPA Draw prize winner Linda Tremble

Saskatchewan Association of HR Professionals Annual Conference Saskatoon

Northern Ontario HR Business Conference and Expo Thunder Bay

Eastern Ontario HR Conference & Trade Show Ottawa

Ontario Municipal HR Association Spring Workshop Ottawa

Atlantic HR Conference Halifax

BC HRMA Conference Victoria

Canadian Payroll Association Conference and Trade Show Victoria

Barrie and District HRPA Annual Conference Bradford

Association of Ontario Health Centres Annual Conference Toronto

2009 HR Executive's HR Technology Conference & Expo Chicago

OMHRA Fall Conference Orillia

HRPA Annual Conference & Trade Show Toronto

Canadian Manufacturers & Exporters Human Capital Conference Oakville

Box event Toronto Blue Jays vs. Detroit Tigers at Rogers Centre Toronto

Upcoming Events ● **Past Events** ●

Your Frequently Asked Questions answered by info:HR support

Q I have created new Employee Comments and other users are not able to view them. Why?

A This is because other users do not have access rights to view them. info:HR considers Employee Comments to be confidential information and therefore provides security. Since not all types of Comments are confidential, the administrative user has option to grant other users to add, edit or view Comments by Type of Comments code. To grant users access to Employee Comments, go to the Setup/Security/Security Master screen:

• select the user who needs access
• select Employee Comments under the More Security menu option

For each type of Comment,

1. click on Edit button
2. grant the user with "Inquire" right (to view only) or "Maintain" right (to add, edit and view)
3. click on OK button to save the changes

Q How can I hide inactive positions in the Position lookup window?

A Simply identify the inactive Positions on the Position Master screen with Position Status code as "INAC" (create the code if it does not exist). When the Position lookup window is called, the "Hide Inactive Position" checkbox (located at bottom of the screen) is checked by default hiding inactive positions. When unchecked, it will list inactive positions in red font.

Q I need to produce a Cost of Employment Report. Does info:HR have this functionality?

A Yes! It is located under Reports/Work History/ Compensation menu. Use it to produce a one-page summary of the costs of employing the employees or groups of employees selected. Costs are grouped into categories and each category of costs is analyzed as a percentage of the total cost. Use the 'Company' option to generate a one-page summary of the investment in human resources for the entire organization. Enter the From/To Dates so that costs for a specific period of time are calculated. To exclude certain costs, uncheck the items you wish excluded.

Question?
Problem?
Idea?
Let's chat.
Call info:HR Support
today. **1.800.567.4254**

Better service through leading-edge communications software, new offices

Delete 2 Carlton Street out of your address book. After ten years, HR Systems Strategies Inc. is moving. And shaking things up a little.

"Our new work structure will be a combination of work days at one of two new office locations. Our new main office in King City, Ontario and the downtown offices of The Toronto Board of Trade (TBOT), a fantastic meeting facility in the heart of Toronto's business district," says company president Andy Staniewski.

A membership with the TBOT enables HR Systems Strategies Inc. to connect with more than 200,000 business professionals and influencers. The facility is first class and provides state-of-the-art meeting and presentation rooms for working, for sales and client meetings, training courses and user group conferences.

The new King City location offers a more relaxed setting away from the city, with access to the facilities of the adjacent King Valley Golf Club for client and staff meetings.

When not at either of the two offices, employees will be teleworking. The concept of teleworking or telecommuting is a growing trend gaining a wider acceptance from employers and employees alike, according to a recent study released by the International Telework Association and Council (ITAC). Telework is increasingly being recognized as a necessary component of the evolving structure of modern work, the report states.*

"We are excited to be at the leading edge of this new approach to workplace management and service delivery," says Andy Staniewski. "Offering clients the best service we can is behind every business decision we make, and we anticipate several advantages arising from this new service delivery mix."

Through teleworking, employees will gain access to the technology—VOIP, hosted service, virtual meetings—and flexible work environment they need to best support info:HR clients.

In addition to upgrading communications technology, HR Systems Strategies has implemented a Project Coordinator program and is evaluating and implementing Collaboration and Project Management software.

Source: "Telework Has Many Advantages"
HR Magazine, January 2000.
Author: Bill Leonard

We've moved!
Our new mailing address is 117 Country Club Drive, King City, Ontario, L7B 1M4. Phone numbers and e-mail addresses remain unchanged.

Project coordinator program

We are pleased to announce the introduction of a new program that will ensure smoothly run info:HR development projects, both for new implementations and existing projects. Every project will now have an assigned HR Systems Strategies project co-ordinator with full accountability for the success of the project. Roles and responsibilities of the project coordinator will include:

- working with the client Project Team Lead to finalize project objectives, expectations, timelines, responsibilities and deliverables;
- developing a project plan with tasks and deliverables as well as timelines and responsibilities;
- scheduling and coordinate project kick-off and status meetings to review progress against the project plan;
- dealing with project issues, changes and requirements as they arise.

HRSS project coordinators have been assigned to almost all development projects currently in progress, and the feedback from clients so far has been tremendous. If you have any questions about the project coordinator program, please call Andy at 1-800-567-4254.

New info:HR clients

Charton Hobbs Canada **Vancouver, British Columbia**
County of Lanark **Perth, Ontario**
County of Perth **Stratford, Ontario**
East Ottawa Family Health Team **Orleans, Ontario**
Merrickville Community Health Centre **Merrickville, Ontario**
NorWest Community Health Centre **Thunder Bay, Ontario**
Women's Health in Women's Hands Community Health Centre **Toronto, Ontario**

Helpful results from our first-ever client survey

Thanks to all who participated in our recent client survey; the response was tremendous! So far, 72% of all clients have responded. The feedback we received was insightful and will have a direct impact on many of our upcoming initiatives:

- 82% of respondents expressed an interest in info:HR public training and as a result we are holding our first series of info:HR training courses this Fall. Look out for dates soon.
- 88% said they would be interested in attending our first ever User's Meeting. As a result, we are planning a Spring 2010 two-day conference to be held in Toronto. The agenda will be packed with sessions about info:HR usage, client presentations, HR Systems Strategies directions and topical HR issues and speakers.
- Feedback about info:HR enhancements was particularly useful and will be incorporated into our product planning.
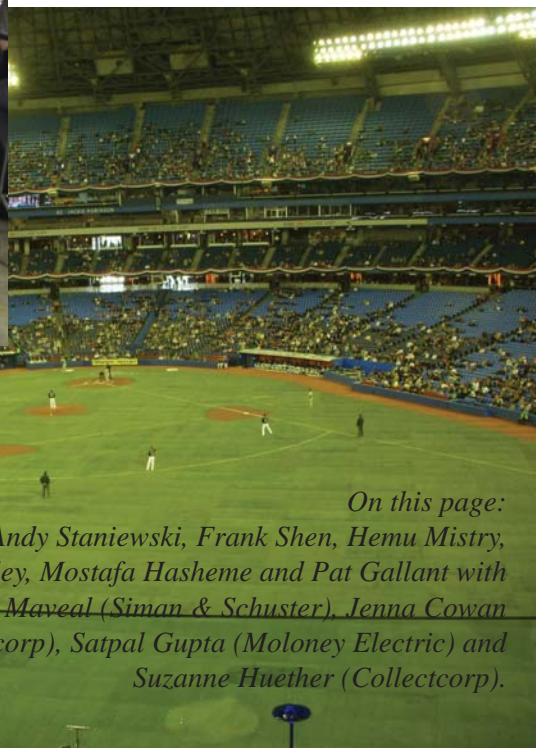
A few comments from the survey:

"Technical tips are great!"

"Keep up the great support!"

"We are thinking of using the Employee Self Serve module for attendance and personal information updates in 2009."

Thanks again for your feedback and hope that you enjoyed the movie tickets!

Having a ball with the BlueJays!

HRSS clients day out at the Rogers Centre June 9/09

On this page:
Hosts Andy Staniewski, Frank Shen, Hemu Mistry, Michelle Beasley, Mostafa Hasheme and Pat Gallant with guests Jan Maveal (Siman & Schuster), Jenna Cowan (Collectcorp), Satpal Gupta (Moloney Electric) and Suzanne Huether (Collectcorp).

info:HR
SOFTWARE

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

117 Country Club Drive
King City, Ontario L7B 1M4
Telephone 416.599.4747
1.800.567.4254

www.infohr.com