info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Summer 2013

Maintaining data integrity at Goodmans LLP

Goodmans LLP is recognised internationally as one of Canada's premier transaction law firms. Founded in 1917, Goodmans has offices in Toronto and Vancouver with over 250 lawyers. As a full-service law firm and a member of The World Law Group, Goodmans has the ability to provide clients with a wide range of services both nationally and internationally. The firm acts for Canada's largest corporations, financial institutions and multinationals, and was recognized two years in a row as the National Law Firm of the Year for Canada at the International Financial Law Review's Americas Awards.

HR Systems Strategies has been proud to work with Goodmans since the spring of 1999 when info:HR, which housed and organized all employee information, and an interface to their payroll system were first implemented. In the past year, Goodman's has become very active in searching out other ways to assist in streamlining various functions.

Goodmans began researching options with the goal to automate and streamline the entire

entitlements tracking and benefits administration processes. With info:HR already in place the question was, "Can info:HR do what we require?" The answer is a resounding "Yes!", we are able to provide Goodmans with the assistance they need to accomplish their goal. A three-stage project began in early 2012.

The initial stage, adding the Employee/Manager Self Serve (ESS) module, went live in mid-2012, allowing employees to view vacation and sick

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Goodmans LLP and HR Systems Strategies Inc.

Goodmans LLP Benefits Administrator Shaundra Moniz with Barbara Chicago, Goodmans LLP Customer Service Representative

time balances, and submit vacation and other time-off requests to their supervisors. Prior to ESS, all vacation requests for Goodmans' employees were received in a vacation email in-box. Wilma Lata, HRIS Administrator, would manually enter the vacations into info:HR. ESS has made the use of this in-box obsolete and eliminated the manual entry of vacation, sick and other time off.

The next phase of the project was to activate and use the benefits function in info:HR to track all employee benefits, dependents and beneficiaries. ESS also helps here by allowing employees to view their beneficiary and dependent information online. "Providing the visibility to employees allows them to notify HR if any changes are required to keep the information accurate and up to date," says Shaundra Moniz, Benefits Administrator.

The third and final stage was to create an interface to the benefits provider, to send benefits data electronically to the insurance carrier for processing. This enables Goodmans to streamline the benefits administration process, eliminate a significant amount of manual effort and make info:HR the main source of all HR-related data.

Shaundra has been with Goodmans as Benefits Administrator since May 2011. Shaundra is responsible for administration and management of benefits for over 500 employees. Prior to this year, Goodmans was relying on the benefits carrier for data integrity by updating changes to employee information in the carrier's web-based application. Over this past summer Shaundra and her team began using the benefits function within info:HR, with the goal of making these changes in-house and ensuring full control over the integrity of the data. "Maintaining data integrity is

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“Having info:HR as our sole source of data removes the possibility of human error through mass data entry.”

the top priority. Having info:HR as Goodmans’ sole source of data removes the possibility of human error through mass data entry,” adds Shaundra.

Shaundra worked closely with Chief Technology Officer Jerry Rowland on this project, beginning with a two-day training session to learn how benefits would be calculated in info:HR and how to set up the benefits properly to ensure correct calculations in the system. Shaundra thought the training was “great” and she felt confident she knew how to proceed with the setup after the session. “Benefits in info:HR are new to us and Jerry made it easy for us; he knows his steps and any questions we might have, I know he is just an e-mail away.”

Working with Jerry, Shaundra was able to complete a mass upload of dependents and beneficiaries into info:HR. The system holds and calculates their health, dental, LTD, and life benefits. Now, with the information being held in–house, staff can view their personal information and benefits on-line from the comfort of their work stations. This empowers employees to make their own adjustments when necessary, ensuring the most current and up-to-date information. Shaundra says, “It’s easy for the employees to view their information on-line with ESS. We have had some employees make changes to their information because they can see it now. It is not out-of–sight, out-of-mind anymore. When you can see that information, it makes it a lot easier to manage.”

This is Shaundra’s first experience working with info:HR and she says “it is really working for us”. She is very pleased with the system and its capabilities. Shaundra is looking forward to the final stage of the project, currently in its testing stage and scheduled for full completion in early 2013. “Completing the benefits integration enables Goodmans to transfer employee data to the benefits carrier on a biweekly basis,” thus removing the use of the carrier’s web application and allowing Goodmans to take advantage of a self-billing option with the carrier. Coming to the completion of the project, Shaundra says, “This is so exciting, I can’t wait to see the results of our project; the real time-saver will be when we are able to achieve self-billing.”

With the completion of the project, Shaundra looks forward to spending much less time on clerical work and focusing on more key administrative tasks.

One of Goodmans’ future goals will be to complete the equivalent project with their payroll system, where deductions for employee-paid benefits are passed to payroll, rather than being entered manually.

With the success of this project, we look forward to assisting Goodmans in their future endeavours, to further streamline their HR processes by using the technological solutions available with info:HR.

Get to know your support team: Frank Shen, Senior Software Engineer

If you've been using info:HR for a while, you've spoken to most or even all of us on the phone at one time or another. But you probably haven't had an opportunity to get to know us on a more personal level. There's quite a diversity of backgrounds, experience and interests–this column will give you a chance to learn more about us. In this issue, we profile **Frank Shen, Senior Software Engineer.**

info: When did you start at HR Systems Strategies Inc. and what has been your role/career progression?

Frank: I came to Canada from Shenzhen, China in 1999. My first job after arriving was with HRSS as a Junior Software Programmer. I've been here ever since, advancing to Senior Software Engineer.

A lot of my work revolves around getting info:HR to work with other systems. As a result, I do much of the design and programming required to perform initial data loads for new clients, where we get an extract of employee data from their payroll or other operational systems and use it to populate the employee database in info:HR. I also do most of the programming of ongoing interfaces to other systems, like payroll and time/attendance.

info: What do you like about working at HRSS?

Frank: I like working here at HRSS since it gives everybody opportunities to use their talent and knowledge, and it fully enhances my professional career growth. I also I like the flexible working environment we have, now that we've gone to home offices.

info: What is your favourite memory and what has been your best experience at HRSS?

Frank: In October of 2011, we all went to the HR Technology Conference & Expo in Las Vegas. We got to see and hear what many other technology companies had to offer the HR community. It wasn't all work; we saw a Cirque du Soleil show and a musical, and we had lots of great food. I would love to tell you more, but you know the rule about Las Vegas.

info: What are you most looking forward to in regards to your future projects/work at HRSS?

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Frank: I'd like to take on more business analysis responsibilities. I'm very familiar with the back end of the development cycle, where requirements are translated into computer code. I'd like to get more involved in the front end, dealing with our clients to help define those requirements.

info: What do you like to do outside of work?

Frank: I love to garden, and spend time with my beautiful baby girl and wife.

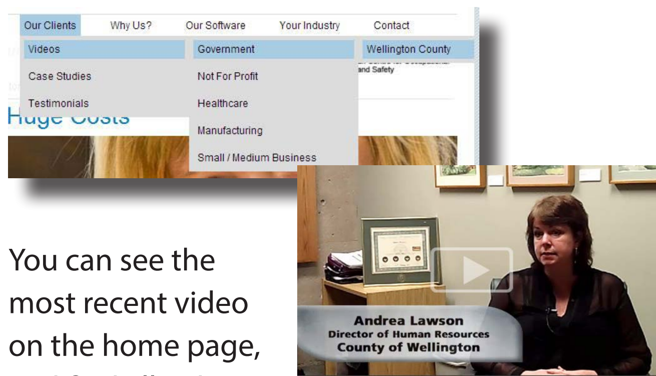
info: What is your favourite movie/TV show/ restaurant/ sports team?

Frank: I really like *Catch Me If You Can*, with Leonardo DiCaprio, especially since it's a true story. On TV I like to watch Dancing with the Stars - it's really impressive how those stars can be so good. I'm a seafood lover, so I enjoy a night out at Red Lobster. I'm a big basketball fan, but my team isn't the Toronto Raptors, it's the Miami Heat. Sorry, Toronto!

Lights, Camera, Action!

by Bill Kennedy, Business Development Manager

If you ever make the occasional visit to our web site, you'll find something new there. For the past few months, we've been posting videos of interviews with clients speaking about their experiences with info:HR.



You can see the most recent video on the home page, and find all videos under the "Our Clients" menu item.

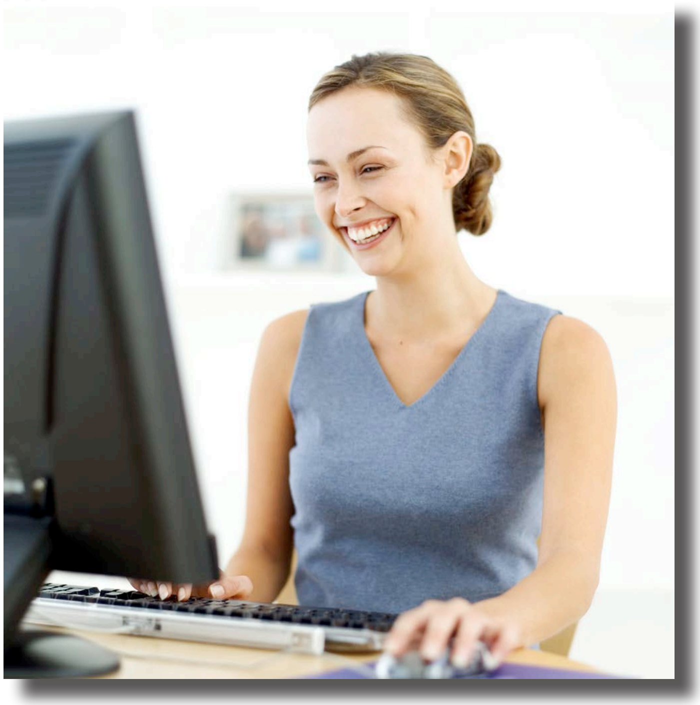
They are organized by category, so if you are interested in a particular business sector, mouse over that category to see what videos have been posted. If a client name catches your attention, click on it to be taken to the video.

We haven't got all categories populated yet, but we are adding new videos every month, so check back now and again to see what's new. If you'd like to share your experiences with others, please contact me – we'd be happy to shoot you (you know what I mean).

"Alright Mr. DeMille, I'm ready for my close-up."

Training and education

by Michelle Forman, Manager, info:HR Training



Hello again, and welcome to the Training and Education column for this month's issue of *info*. I love talking about training because it's the number one thing you and your company can focus on to ensure you are realizing the full benefits of info:HR.

Human resources is under more pressure than ever before to present the key personnel data your senior executives require to make decisions about your business, and we want to be a trusted partner in ensuring you are getting the full value of the data you've built up in info:HR.

To that end, we want to make it as easy and cost-effective as possible for you to get the training you require. In this column, I'd like to focus on web-training.

Some benefits of web training include:

- It conforms to your busy work schedule. You have a full work schedule and it's challenging taking an entire day out of your calendar. Web-training sessions are typically conducted in two- to four-hour blocks.
- Web-training sessions are tailored to your needs (I'll give you some ideas later in this column).
- Web training is great for new hires, and is much better than forcing a printed manual on a new starter.
- With web-training, we will select an instructor who is an expert on the topic. For example, Jerry might conduct benefits training, Hemu might conduct attendance and time banking, I would provide ESS training, etc.
- Web-training is very cost effective. The partial-day sessions have much less impact on your training budget, and there are no travel expenses.
- It's convenient for you and can be conducted in the comfort of your office or meeting room.

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One of the most common uses of web-training is for refresher training courses. Have you been using info:HR for a year or more and wondering if you are getting the greatest benefit from it? Have you have experienced some turnover in HR and question if your processes of inputting data into the system are consistent among all staff?

It is very common that users get comfortable with the capabilities of info:HR when it is first implemented. The problem with this: as years pass, users may not keep up with the new features that we have added to the system. A refresher training session will look at current processes and streamline those with the latest functionality in info:HR.

Refresher courses are customized and tailored to each client and each session. Some of the most common sessions would include:

- New hire processes, leave of absence tracking, employee flags and follow-ups
- Attendance management and reports
- Continuing education tracking, renewals and reports

If you would like to find out more about web-training and refresher training courses, please call me or send me an email at michelleb@infohr.com. Enjoy your summer!

HRSS on the road

In April, Michelle and Andy travelled to Edmonton to attend the 2013 HRIA conference and trade show. Michelle reports that the trade show was well-attended and that she had many visitors to the booth. Here she is, hard at work.

Troubleshooting tips and techniques

by Hemu Mistry, Application Development and Support Manager

Well, summer is almost here, and I feel this year is going by really fast. But, I am looking forward to the warmer temperatures and saying goodbye to the cold weather.

I hope info:HR has been treating you well, and you are making use of the new functions that we have added in our 7.9 version. And on an exciting note, we will soon be launching the 8.0 version of info:HR with a whole lot more new functionality.

In this issue of the newsletter, I am going to concentrate more on how to troubleshoot some of the common issues that we have come across on our support line. Even though these may sound more like technical issues that you would rather have your IT deal with, you'll be surprised how much you can troubleshoot yourself to make sure that things are set up correctly from your end, right from the start.

Error #339 or #374:
One of the issues that we have come across a number of times is related to the "Error #339: Component 'IHRCtrls.ocx' or one of its dependencies not correctly registered: a file is missing or invalid" or "Error #374: Failed to activate control 'VB User Control'. This control may be incompatible with your application." Whenever you get this error, it indicates that your info:HR application file is out of sync with info:HR's control file, 'ihrctrls.ocx'. Most of the time you will need IT to resolve this issue for you, but you can try to troubleshoot yourself if have Admin rights on your computer. Follow the checklist below to first make sure the info:HR setup is correct on your computer:

- Is the info:HR shortcut (ihr.exe) pointing to the info:HR folder (shared info:HR folder)?
  If no, then make sure you change the shortcut to point to the info:HR folder and then try running info:HR to see if the error is fixed.
- Is 'ihr.exe' (application file of info:HR) older than the 'IHRCTRLS.ocx' file in the info:HR folder? In the folder, change the view to Details and check the Date Modified on the two files.
  If yes, let your IT know and have them contact our Support line for assistance on this.

If the above is set up correctly then it seems likely you will need to re-register the control file on your computer. To register the control file, which actually updates your computer's registry file, you will need Admin rights on your computer. If you are not sure you have the Admin rights, you may try the following steps anyway and, if that does not work, you will need to contact your IT, who can give you the Admin rights. IT can also log onto your computer as an Admin user and do the following steps:

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1. Turn OFF the UAC.
2. Run the regsvr32 command from an elevated Command Prompt, i.e. click Start\All Programs\Accessories -> right-click Command Prompt, and click on "Run as administrator" -> at the prompt type the following, replacing {path to info:HR folder} with the actual path to info:HR shared folder: regsvr32 "{path to info:HR folder}\IHRCTRLS.ocx"
3. Press Enter.
4. You should get a message as "Dll......registered successfully." If you don't get a 'successfully registered' message then let your IT know. IT will need to log into this Windows environment as an Admin user and then try the manual register steps again.
5. Reset the UAC to its previous level.

If the error still persists, contact our Support line.

Installing info:HR on Windows 7 environment:

This can be a little tricky due to Windows extended security that causes the control (ihrctrls.ocx) file that would normally register automatically not do so. To avoid this type of situation, you have to follow our specific steps to install info:HR on Windows 7. Please download the instructions from www.infohr.net/support/files/infoHR_SQL_Client_Installation_Instructions.pdf to install info:HR on Windows 7. Basically, you have to turn OFF UAC on this Windows 7 computer, then right-click and run the install file as "Run as Administrator". And whenever you want to set/change the Data Source for Database connection in info:HR, you also run info:HR as "Run as Administrator". Both the client installation and Data Source setup are updating your computer's Registry setting, and this can only be done if the UAC is turned OFF and the user logged into the Windows 7 has permission to update the Registry keys. Once complete, you can reset UAC to its normal setting.

Windows 8 and Internet Explorer (IE) 10 environments:

We are aware of the issues info:HR is facing on Windows 8 and we are working on the resolution. We are in a process of releasing a service patch to resolve this issue this year.

As for our web modules running on IE 10, you will notice some of the features not working. Some of the issues involve incompatibilities between different Microsoft components, which may not be resolved until Microsoft releases a fix. Others can be dealt with locally.

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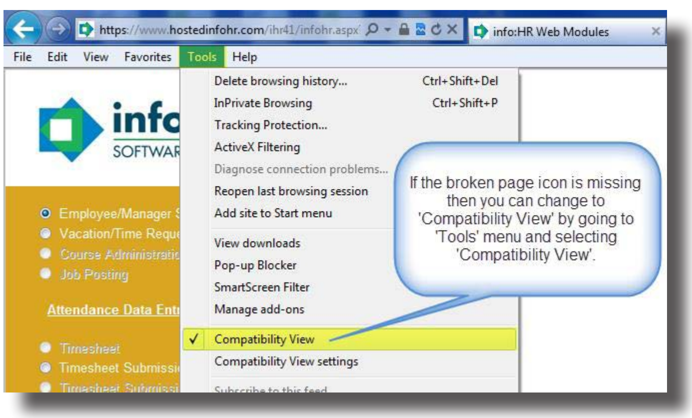
Troubleshooting tips and techniques

In order to fix this, you will have to load the web module page in Compatibility View. There are two ways to do this:

1. Click on the broken page icon in the Address bar.

2. Use Tools menu and choose Compatibility View.



Tips:

Did you know info:HR has an option to send out email notifications on various types of transactions?

You can send out email notifications on functions like: new hire, salary change, benefit change, termination, etc. These options are available under the Setup menu -> Company Preference screen. You can turn ON or OFF the type of notification by simply clicking on the associated checkbox. In the email text box, specify the email addresses of the employees who should be receiving the notification for that type of transaction. For more than one email address use a semicolon (;) to separate each email, without any spaces or line breaks. In case the recipients are dependent on the employee in question, use the "More emails" button. On this screen, create employee group(s) using the selection criteria and add the associated recipients' email addresses.

If you want to test the email sending option or simply want to send out emails from various info:HR screens independent of email notifications, turn ON the "Email Functions" on the Company Preference screen under the Setup menu.

For all these email sending and notification functions to work, you first need to set up the Email Setup screen for each info:HR user under the Setup menu\Security\Email Setup screen.

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The "SMTP Server" address would normally be same for each of the users set up on this screen. Your IT will be able to give you the SMTP Server name/IP address that is used for by your Exchange Server to set up on this screen.

To test that email sending works in the first place, even before testing the notification emails, go to the Status/Dates screen under Employee menu\Basic Information, select an employee if prompted, set the Email Address on this screen if not already set up, click on the Mail icon on the toolbar -> send out a test email. If the email is sent out successfully and the recipient receives the email, then your email notifications will work fine and your Email Setup is correct. If you get an error then check the SMTP log. This log file is located under the info:HR folder (shared info:HR folder). You can send this file to our support to identify the problem or you can send it to your IT.

Have you ever come across a need to change the Employee # in info:HR?

If so, then the step to change the employee # is very simple and the system will change it wherever it is used in the system. To do this, go to Mass Updates menu\Employee Number. Under this option you have option to change the Employee # of an Active employee or Terminated Employee, select as appropriate. You will be prompted to select the employee for whom you wish to change the Employee #, or if you had already used the Find Employee menu function, that it will be put against the OLD Employee #. If that's not the correct Employee #, then call up the Employee lookup and find the correct employee. Now enter the NEW Employee # and then click on the Mass Update (multiple disk) icon on the toolbar to update. At the prompt, click on 'Yes' to proceed. This will update all the employee records of this employee with the new employee #. If for any reason the NEW Employee # already exists, the mass update function will prompt you accordingly and will not allow you to proceed until you enter a new unique Employee #.

This is how you can also change any of the codes in the code lookup as well. To do this, go to Mass Updates menu\Codes. This screen gives you the option to change the Codes for different types of code tables. Select the appropriate type of code. The option for Table Master is all the of the codes in info:HR. After selecting the appropriate type of code, enter the OLD Code and NEW Code. If the new code does not already exist then create one and select it. Then click on the Mass Update (multiple disk) icon on the toolbar to update. This option will not only replace occurrences wherever the old code is used with the new code, but will also delete the Old code from the system for you.

I hope this section has been informative as previous ones. See you in our next issue and until then, have a great year! ☺

Employee/Manager Self Serve and Online Timesheets v4.2 are here!

by Jerry Rowland, Chief Technology Officer

Last summer we announced that there would be new versions of our web-based modules. We are happy to say that they are now available, and have been in use at several client sites for over a month now. Here are some of the highlights you'll see in the new modules.

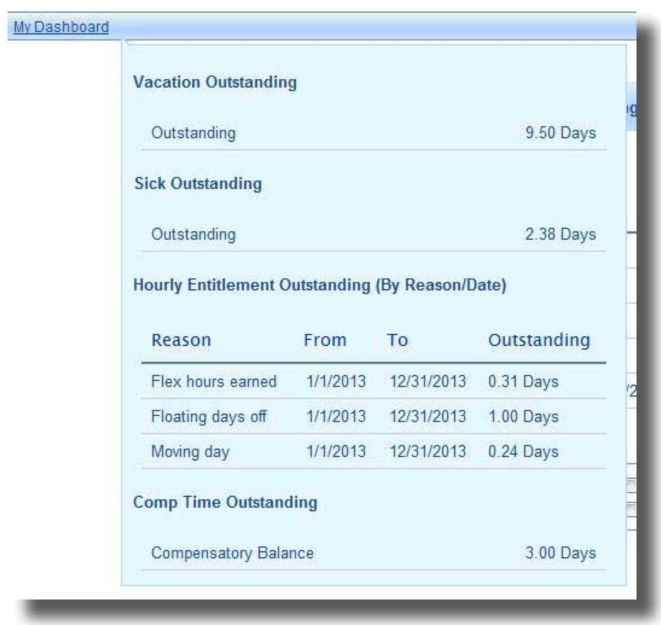
In order to help users, especially new users, navigate their way through ESS, we've standardized the overall look and feel across all the screens by using consistent colours, fonts and buttons. Now,when you move from one screen to another, you'll see a high degree of similarity in the layout of data on the screens, including button text and location. For users familiar with previous versions of ESS, most changes are relatively minor, and should not present any difficulties for people familiar with earlier versions.

The menu structure has been changed to expand and collapse dynamically as you mouse over to see the screen options for each section. This makes the menu much more unobtrusive, showing you only the screen options for the section you're interested in.

You'll notice three new options you can make available to the users through their info:HR security settings. These are…

- My Dashboard on the breadcrumb line
- Entitlements / Dashboard
- Entitlements / Calendar

The breadcrumb dashboard shows a pre-determined (via info:HR setup) list of entitlements for the employee. Mouse over the "My Dashboard" hot spot on the breadcrumb to display the list; click on the hot spot to close it.



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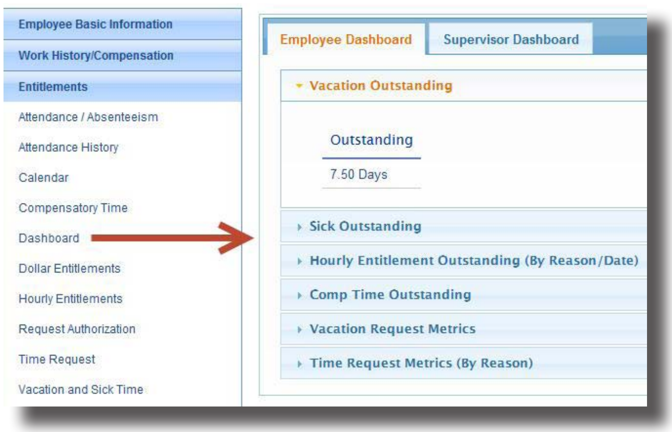
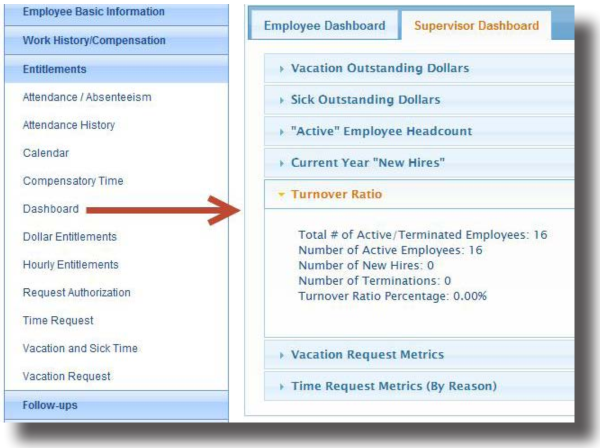
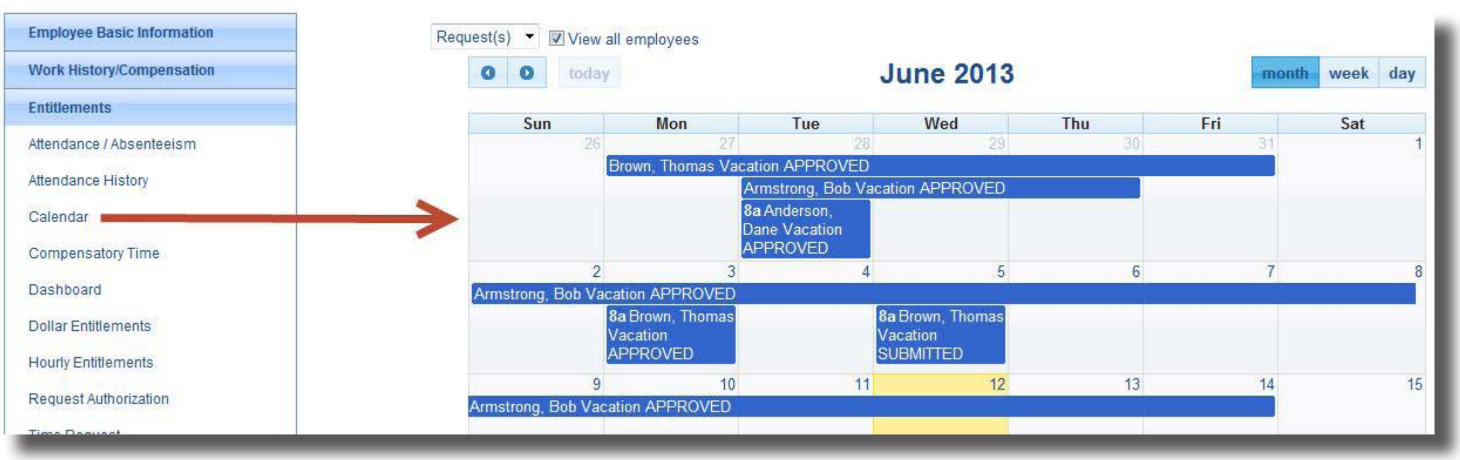
The entitlements dashboard shows a list of selected items, defined in the info:HR Setup section. Employees will see their own dashboards. Supervisors will see their own dashboards, plus a different set of cumulative statistics for their employees.





The entitlements calendar shows a calendar view of all submitted and approved vacation/time requests. Employees will see their own requests. Supervisors can choose to see a single employee, or all employees reporting to them.



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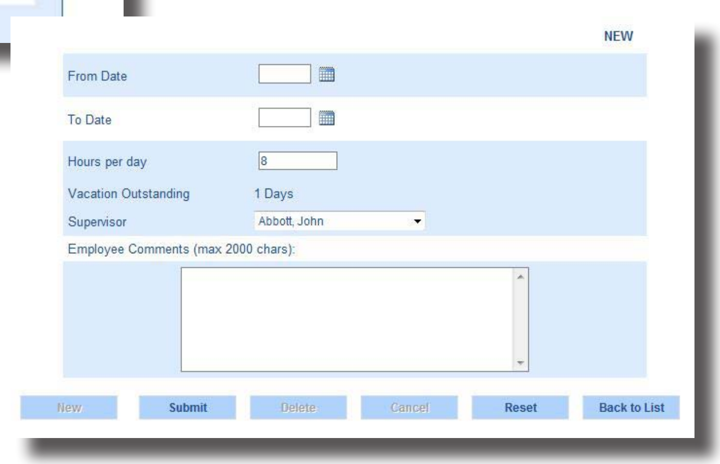
Employee/Manager Self Serve and Online Timesheets v4.2

You can click on any entry in the calendar to see its details.

You'll also see improvements in the three main request screens: Vacation Request, Time Request and Request Authorization. In all cases, what used to be displayed on a single screen has been broken into two screens, a summary list screen and a request detail screen. Here are examples for the vacation request function…

Click on the pencil icon or click on New Vacation Request to move to the request detail screen.

Note that the supervisor's name, rather than email address as in the previous version, is displayed.



Changes to the Online Timesheets screens are less, but we have adopted the same colour / font / button scheme that ESS uses.

Clients currently using an older version can move up to v4.2 at any time. We'll be providing a live tutorial to review the differences between the old and new versions, as well as the new setup, security and IT admin settings introduced in the new version.

Welcome new customers!

Crossroads Children's Centre

Decor Cabinet Company

Guelph/Eramosa Township

Mosaic Counselling and Family Services

The Town of Greater Napanee

Polycultural Immigrant & Community Services

Township of Severn

Workers Health and Safety Centre

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