info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Fall 2014

Letter from Andy: Pet peeves, customer support, and successful webinars

One of my pet peeves is calling a customer support helpdesk and getting stuck in an automated attendant merry-go-round. My "favorite" is my telecommunications provider. I've been in a queue for hours and then found out I'm in the wrong line. If there was a bridge nearby I might have jumped off it. It's rare today to have the privilege of speaking with a live person who is qualified to field your questions. This is something at HR Systems Strategies Inc. we pride ourselves in. I always want one of my team members (or myself) to answer the phone and if necessary patch the call as quickly as we can to an experienced support person. There are always dedicated staff on the support line and back-up staff if necessary. Whether it's Hemu, Barbara, Michelle, Frank, Mostafa, Jerry, etc. you should be speaking with one of them within seconds or brief moments from making your call. The average tenure of our support staff is close to 10 years, so you will be in good hands when you call. We have a support ticketing system and "meet" regularly to review outstanding support calls and issues. So how are we doing? Please let me know if we are being as responsive as we strive to be. This is an area I will remain passionate about and hope it distinguishes us from our competition. I'm so pleased you have received our webinar series so well. It tells me you are wanting to become better info:HR users and utilize more functions in the system. We will continue this program on an on-going basis and welcome your ideas for future topics. Thanks as always for your continued support!

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HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

Tips and Techniques

by Hemu Mistry, Manager, Application Development

Hello everyone!! I hope the summer has been fabulous for you all as it has been for us. We are rolling out our new release of info:HR, release 8.0, full of new features and functionality. Let me take this opportunity to provide you with insight on one of the functions.

Follow-up Emails:

We have extended the functionality on Employee Follow-ups in release 8.0. So far you have only been able to see on screen and on reports various follow-ups that were due. Now, release 8.0 can send out automatic email notifications to inform an individual or individuals of various follow-ups that are due.

You will first need to set up the Follow-ups Code Email Matrix, under the Setup menu. If you don't see it there that means you do not have the Security rights to use this function. The security setting is located under the Setup menu \ Security \ Security Master \ More Security \ Utilities. The matrix allows you to define for each follow-up code who should be notified via emails, e.g. reporting authorities, the employee him/herself, other employees, and/or specific email addresses. This also allows you to define how many days in advance the email should be sent out and how often. The emails will only be sent out for those follow-up codes for which the matrix has been set up and the codes that have been tagged to send out the emails. Since it is possible that you may want to set up the matrix but not send out the email notifications for certain follow-up codes yet, we have provided the tag option, i.e. to turn ON or OFF the email sending for each of the follow-up codes. This option is located under the Follow-up Code lookup screen called 'Send Email'. If the matrix for a Follow-up Code is set up but the Follow-up Code itself is not tagged to 'Send Email' then the email will not be sent out.

Once the Follow-ups Code Email Matrix is set up, you will then need to make sure the Email Setup screen under the Setup menu \ Security, is also set up for at least one user of info:HR. This user's email sending credentials, e.g. the SMTP Server, SMTP Username, etc., will be used to send out email notifications for all the Follow-up Codes set to send out emails and have been defined on the matrix. You will probably need the assistance of your IT to set up the Email Setup screen.

The final step is for your IT to do an info:HR client install on the info:HR server and then set up a scheduled task to run the infoHR_FollowUpEmail program once a day. Once this is done, depending on when the scheduled task is set to run next, the follow-up emails will start going out as per the setup on Follow-ups Code Email Matrix.

If you need more information on the Follow-ups Email setup, please refer to our Summary of Release 8.0 Changes document that has been provided to you with the info:HR Release 8.0 shipment.

Quick Tip

If you ever find an employee missing in info:HR reports and you have made sure all the related data entry screens have been filled in for that employee, then please check to make sure that this employee has a 'Current Position Record' on employee's Position screen and a 'Current Salary Record' on employee's Salary screen checked for the most recent position and salary records. Most of our info:HR reports are Position and Salary record dependent, therefore every employee must have at least one Position and Salary record marked as 'Current'.

If you need any assistance or have any questions on the above, please call our Support Line at 1-800-567-4254 or email us at support@infohr.net. See you in our next issue!

New releases!

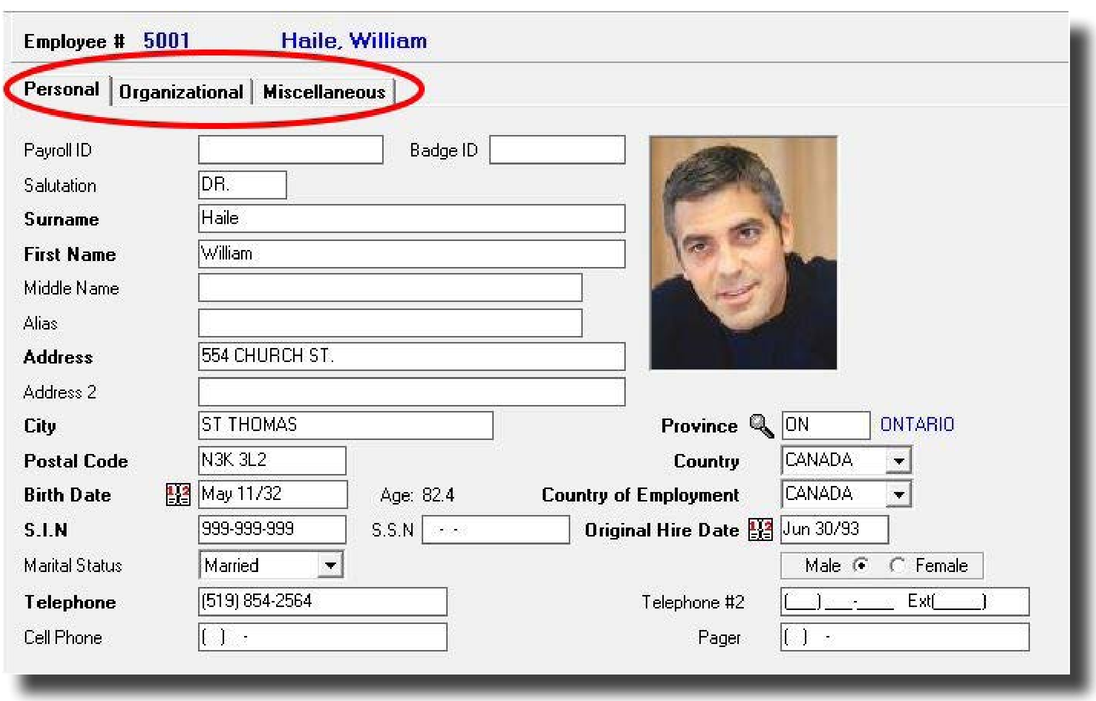
by Jerry Rowland, Chief Technology Officer

info:HR release 8.0 is out!

It's been a busy year for our development team here at HR Systems Strategies. There has been work on a number of different fronts, including the core HR administration module. Here are a few highlights of release 8.0:

- Redesign of the Employee Demographics page.
- Ability to store employee photos in a folder on the server and not within the info:HR database.
- Automatic follow-ups are created whenever the Employment Status To Date, Passport Expiration Date or Visa Expiration Date is entered.
- Existing follow-ups can be maintained during an employee salary adjustment or performance review, thus saving time from having to go to a different menu item.
- Automatic emailing when follow-ups are coming due.
- During a termination, if the employee is a Reporting Authority, you have the ability to mass change the terminated employee number with the employee number taking over the reporting authority responsibilities.
- Enhancements were made to the Mass Update menu item including the ability to perform monthly year-ends for clients whose entitlement dates are based on the hire date.
- New reports were added, e.g. Employee Dates and Length of Service, and other reports were enhanced.

All this and more is fully described in the Current Release Documentation, available on the client portion of our web site. We are releasing in stages, so you'll receive an email when it's ready for you to install.



Release 5.0 of Employee/Manager Self Serve is here!

New versions of the web modules, including ESS/MSS, Timesheets, Simple Timesheets (new), Punch In/Out, and Applicant Tracking web form are available. Here are some highlights:

- In ESS, dashboard enhancements and a "Quick info" link. Both are controlled via info:HR security settings.
- On the Request Authorization page, the user has the ability to see which other employees have time off within the same period as the request in question by clicking on a new "Other Time Off" link.
- Enhancements to the menu item Calendar display.
- Ability to have an approved vacation/time request update the requester's Outlook calendar.
- Improved reporting.

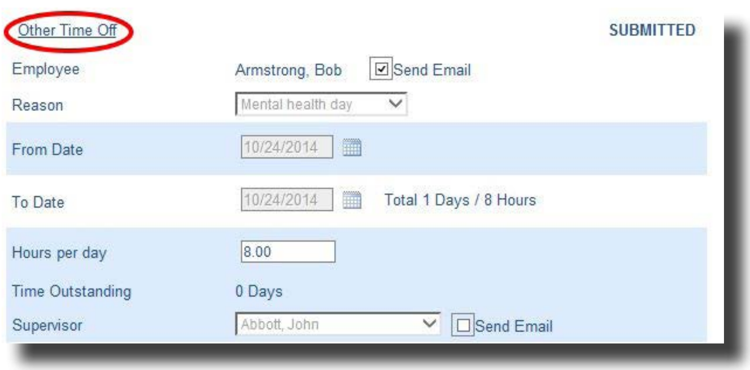
Release 5.0 and the latest version of the Applicant Tracking web form require release 8.0 of info:HR. As with info:HR, we are shipping release 5.0 in stages, so you'll get an email when it's available for you.

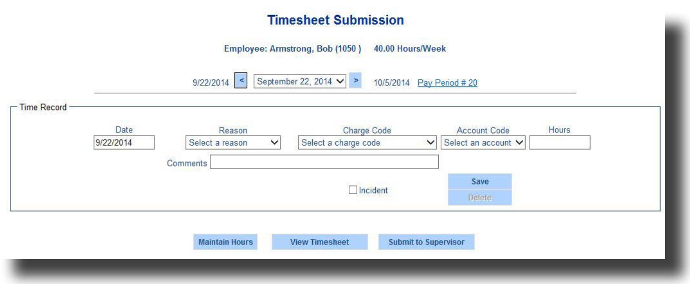
Timesheets – a simpler way

Up until now, the presentation of the online timesheets has been a grid style – pretty much like an Excel spreadsheet. If you have many rows on the grid because you are tracking many attendance reason codes, the grid can be more difficult to navigate. For that reason, and at the request of one of our excellent clients, we developed what we call the Simple Timesheet display (we know, not a great name but it's the best we have right now).

The simple display lets a user deal with one date and one reason code at a time. A series of dropdown lists makes it simple (there we go again) to select the correct values for reason code, and position, charge and account codes if you're using them. When the entry is saved, it automatically populates the correct cell in the grid view. A button lets the user toggle back and forth between either view.

If your employees are struggling with the grid view, show them how simple (!) it can be.





Webinars – an update

by Barbara Chicago, Client Service Representative

We began our webinar series last year with a pilot project to assist our clients with their Year End Process. The response was very positive, and we expanded the series to include Security Templates and Training Plans. Again, the response was very enthusiastic. That led to a further expansion of the topic list and as before the response has been overwhelmingly favourable.

The first webinar after the summer break was "Flags, Follow-Ups, Comments and the Leave Process". The first session filled up in a matter of hours, so we opened a second session that filled up in a few days. The 1pm session had a 95% attendance rate and the 2pm session had a 115% attendance rate. Wonderful!!

Some of the comments we have received so far:

Thank you, we have not used these sections before but I can now!

Awesome, this will take the place of my sticky notes. Thank you!

Wow! I can do that?

Very informative! Thank you.

Thank you to all of our clients who participated to make this program such a great success. As always, your feedback is very important to us. Our next webinar is on November 19th and the topic will be "info:HR Reporting". If it fills up, we will open a second session to accommodate the overflow.

Don't forget to check the Client Section of the web site for our current schedule. We will be adding to it over the year. Please, if you have a topic of particular interest, send your suggestion to support@infohr.com and we will consider adding it to our calendar.

We have a winner!

We usually offer a draw prize at trade shows for people who stop by and say hello to us.

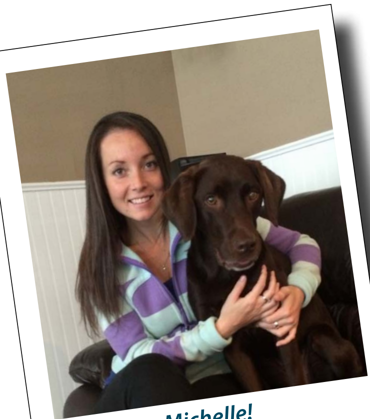
Check out some recent winners…

The Law Office Management Association 2014 Annual Conference draw winner, Bernard Quilty of Davis LLP, with Barbara Chicago

Ontario Municipal Human Resources Association Fall Conference draw winner, Sandra McKenzie of the City of Vaughan

Get to know...

... your support team: Michelle Beasley, Business Development Manager - Western Region



Michelle!

If you've taken any info:HR training over the past five plus years, or are lucky enough to live out on the west coast, then you've probably met or spoken with Michelle. Here's a bit more about her.

info: When did you start at HRSS and what has been your role/career progression?

Michelle: I started in January of 2009 as the Training Manager. In 2011 I moved to Vancouver and my role broadened to include Business Development Manager for British Columbia and Alberta.

info: What do you like about working at HRSS?

Michelle: I love working with a great bunch of people who all have the same goal in mind – to help serve our clients to the best of our ability. We really pride ourselves on working as a cohesive group to help each other and our clients with the use of the software.

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

Michelle: I really enjoy attending the tradeshows. It's nice to get out there and meet potential and current clients, demo our software, and more importantly scope out the other booths for candy and prizes. ☺

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

Michelle: I really look forward to growing the business on the west coast. I love being able to visit the clients that are in the lower mainland and have those face to face meetings. It's very fulfilling being able to leave a client site and know that you have just alleviated some manual work or a report by showing them how they could use the system to do it for them.

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

Michelle: I have a 4 year old Chocolate Lab and a 5 year old Golden Retriever. My time outside of work is spent with them hiking the mountains, or walking the beach and tossing the ball into the ocean for them to fetch.

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

Michelle: My favourite movie would definitely be The Notebook. I love the storyline, and of course Ryan Gosling. I don't watch too much TV, but when I do its reality TV. Embarrassing I know, but I tend to get caught up in The Bachelor/Bachelorette and Big Brother.
I don't know if I have a favourite restaurant, but living on the west coast I definitely love the sushi! As for sports team…I'm an Ontario girl through and through. I love the Leafs and will forever, hoping one day they can bring home the Cup.

Welcome New Customers!

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HR SYSTEMS STRATEGIES INC
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117 Country Club Drive, King City, Ontario L7B 1M4
Telephone 416.599.4747 Toll Free 1.800.567.4254
www.infohr.com