info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Spring 2015

Letter from Andy: Announcing Mobile Modules

Today almost everyone is carrying a mobile device, whether you are 5 or 85 years old. Is that progress? I think yes with a couple of caveats. I have three children that are 20-something years old. I have a rule that when we are out for dinner, we put our phones away so we can have a conversation together. I can just see how anxious they are, that they might miss a Snapchat from a friend! I attended a conference recently and was struck by how many people were on their devices and how little interaction and networking was going on.

Don't get me wrong, I see the tremendous benefits of mobile technology, social media, etc. I own my treasured iPhone 6+ and was headfirst into Twitter, Facebook, Instagram, etc. However, I had to pull back and evaluate the amount of time I was spending on certain apps and the value I was getting. I feel I am getting closer to a disciplined approach to how I take advantage of the applications available to me. No question there is so much valuable information out there and it's seconds away.

The employees coming into the workforce are living and breathing the rapid changes that are taking place. Your existing employees as well. We recognize this and have released a mobile version of our Employee/Manager Self Serve module. It looks great! Your employees will love it and I hope you check it out!

Andy Staniewski

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

Training Plans Lead to Successful Audit

info:HR has always been a popular HR Information System with manufacturing and distribution companies of all sizes. One such company is an industry leader in the fabrication and distribution of protective packaging materials, custom designed products and corrugated boxes of all sizes and grades.

Although having started small, the company now operates various facilities totalling over one-third of a million square feet and services over a thousand clients throughout Canada and the mid-northern United States.

The company is ISO 9001-2000 registered and serves all sectors of the economy from award-winning point of purchase displays to the heaviest industrial packaging.

In 2007 the company became a client of HR Systems Strategies. A new Human Resources Manager began with the organization in 2010, who has consistently expanded the use of the system over the past five years to include access by supervisors in three plants. This allows all management and supervisors to review employee records. "We find it so helpful for all of our Supervisory team to have access to information when they need it. From performance reviews to attendance and training records, supervisors can access what they need instead of waiting on HR to retrieve the information for them. It has really streamlined our processes, which everyone loves," the Manager remarked.

Upon acquisition in 2012 by a large Canadian conglomerate, a greater demand for the organization of record keeping was required. Prior to acquisition the Manager used info:HR to track and maintain training records for the company's ISO certification purposes. "Audits were much smoother using info:HR, with the document attachment feature and the reporting functionality.

"When I was asked for a document I was able to produce it in a couple of clicks for our Auditors. Our decision to import documents and the ease of retrieving our documentation was remarked on and praised in a number of our ISO Audit reports," she explained.

After the amalgamation there was an added requirement for documentation and reporting of Health and Safety training records specifically for the Corporate Management Team.

"Our new owner has an exceptional safety standard, requiring continuous health and safety training for their employees at every level. This is strictly maintained through a 'Pop-In Audit Practice'. Being new to the corporate family, it's important for us to show our new peers that we share the same health and safety values," said the Manager.

An internal Health and Safety audit team from the corporate offices will arrive unannounced at a facility and spend time speaking with the staff regarding health and safety practices at the host facility.

"We as a management team are required to produce comprehensive reports in an Excel-style format on all of our health and safety-related training, complete with the status of each training course and renewal information. Noncompliance is not tolerated," she described.

info:HR employee training plans were introduced to the Manager in early 2014 through conversation with Barbara Chicago, HRSS Client Service Representative and Trainer.

"She contacted me to ask if there was a way to store records for reporting purposes in the required format. We discussed Training Plans and the Training Matrix report - this was my favourite report to give to my auditors," Barbara commented.

Shortly after their conversation Barbara began working with the Manager to build employee Training Plans to suit their organizational requirements. Barbara has had real world experience working with info:HR and the Continuing Education section of info:HR, coming from a manufacturing and auditing background herself.

"I was thrilled to be able to assist her with setting up the framework for the continuing education records required by the new owner. She and I had a number of discussions regarding the best way for the records to be stored to ensure the criteria for ISO and the health and safety auditors would be met equally; we also considered ease of reporting in our plan."

Barbara and the Manager began working together on the project in June of 2014. Through discussions and training they created a plan to move forward with a solution.

"Barbara took the time to really get to know our business and understand our requirements, when she was unavailable Bill was always there to help me as well," the Manager said.

In September of 2014 the corporate audit team arrived at the local facility for a health and safety audit.

"I am pleased to say I was fully and completely confident when the auditors arrived that our records were accurate and up to date. I produced the reports in the format required by our auditors quickly and easily," the Manager continued. "With this being our first audit it was important for us as an organization to be compliant. We succeeded! The auditors did not require any further information from me; we satisfied the requirements with the reports I ran from info:HR in a matter of minutes with a few clicks of my mouse," she declared.

"I was so thrilled to hear that the audit went well for her and her team. I understand how stressful the audit process can be and making it just a little easier for someone, well it is just good to know we could contribute," added Barbara.

Tips and techniques

by Hemu Mistry, Manager, Application Development

Hello everyone! Welcome to the tips and techniques section of this newsletter. In this issue I will talk about some of the new functionality we have added in info:HR release 8.0.

Importing Email Addresses

There are two places where you can store an employee Email Address in info:HR. One is on the employee's Status/Dates screen located under the Employee menu/Basic Information, which stores email addresses for all employees in the organization. The other is on the Email Setup screen located under the Setup menu/Security, which stores email addresses for the users of the ESS and Timesheet modules.

The email address on the Status/Dates screen is used as the "To" email address when sending out an email from info:HR directly using the Email Sending icon ( ) on the toolbar. The email address on the Email Setup screen is used when sending out request and approval notifications from the ESS and Timesheet modules.

Instead of manually entering each individual employee's email address on the Status/Dates screen and/or Email Setup screen, you can mass import email addresses on these screens from an Excel spreadsheet created with the format dictated by the system, which is dependent on the screen you want to import the email addresses to. For this, go to Mass Updates menu/Import Email Address screen.

On this screen you have the options to import email addresses on the Status/Dates screen or Email Setup screen. The file layout for each is displayed when clicking on the question mark ( ) icon. When ready to import the Excel spreadsheet, select the appropriate screen to update the email address on, i.e. "Update on Status/Dates screen" or "Load Email Setup", then click on the Browse icon ( ) to select the Excel spreadsheet file to import email addresses from and then click on the "Import" button to import the email addresses.

Reporting Authority Mass Change

Did you know we have now added more selection criteria on the Reporting Authority screen under Mass Updates menu? This will allow you to mass update the employee's current Reporting Authority (1-4) on the employee's current Position screen meeting the selection criteria conditions. For example, if you want to replace the Reporting Authorities of employees regardless of what their current Report Authorities are, then simply enter the New Reporting Authority, then select the appropriate selection criteria to define the group of employees whose current Reporting Authority has to change to New Reporting Authority, and/or simply select the Employee Number(s) to update under the "Update Employees" section (optional) and then click on the Mass Update icon ( ) on the toolbar to replace the existing Reporting Authority of the employees with the new Reporting Authority. These will update all the employees meeting the selection criteria or the Update Employees list with the New Reporting Authority.

As another example, if you want to replace the existing Reporting Authority of the employees with a New Reporting Authority based on what the existing Reporting Authority is, then enter the Old Reporting Authority (i.e., existing Reporting Authority) to be replaced and then enter the corresponding New Reporting Authority to replace it with. Thereafter, select the appropriate selection criteria to define the group of employees whose current Reporting Authority has to change to New Reporting Authority or simply select the Employee Number(s) to update under "Update Employees" section (optional) and then click on the Mass Update icon ( ) on the toolbar to replace the existing Reporting Authority of the employees matching the Old Reporting Authority with the New Reporting Authority. This will update all the employees whose current Reporting Authority matches with Old Reporting Authority with the New Reporting Authority and meets the selection criteria or the Update Employees list. If an employee's current Reporting Authority doesn't match the Old Reporting Authority then that employee's Reporting Authority will not change.

info:HR Attendance Maintenance

Did you know that if any attendance records in info:HR that were created via ESS, using the Vacation and Time Off Requests Approval page, are changed or deleted on the info:HR Mass Employee Attendance/Entitlements menu \ Attendance screen, the system will give a warning message with a prompt on the Attendance screen asking, "This record was added from ESS – Request Approval. Are you sure you want to change / delete this record?"? You can click on the Yes button at the prompt to save the changes or delete the record; however, this change will not be reflected in the approved ESS request. In order to have a proper audit of changes, these types of changes should go through the ESS module itself as a cancellation or a negative hours per day request. That way, there is a match between approved requests and the attendance records that are generated.

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.

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

Get to know...

... your support team: Jerry Rowland, Chief Technology Officer

It all started with one company in London, Ontario looking for a better way to track their personnel files. The call went out to Jerry to design and build a software application that would fill the bill. What started as a system for one client has grown to be the general-purpose HR Information System we all use today. Here's a bit more about Jerry.

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

Jerry: I'm one of the original owners and founders, and started when HRSS was first incorporated back on April 1990. I can't believe it's been 25 years. Time does fly when you are having fun! Since 2008, I've been working for the new owner, Andy, doing similar type of work.
I am responsible for the design and development of the info:HR application and associated modules, interfaces and integrations with third-party systems like payroll.

info: What do you like about working at HRSS?

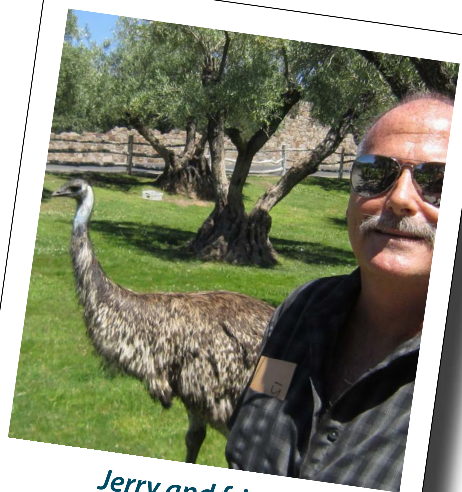
Jerry: The co-workers. We have a wide variety of cultures that mixes well together. Having to deal one-on-one with clients is enjoyable too.

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

Jerry: After 25 years, I have many favourite memories. It's hard to identify one specific experience that stands out the most. My best experience has been to see the company grow from two people to where we are now.

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

Jerry: Taking advantage of current technology - further development of the web interface for info:HR, including some dashboard designs.



Jerry and friend

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

Jerry: As little as I can get away with! That said, I live in a tourist town so there are plenty of activities available to do. The Coachella Valley in southwestern California, where I live, has 128 golf courses. After many lessons and attempts, I've determined that golf isn't my game.

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

Jerry: TV: NCIS (et al), Modern Family, The Big Bang Theory and a number of other shows on History, Home & Garden, Military and National Geographic channels. Movies: Most action flicks provided that they are not based on a cartoon character. This rules out most, if not all, of the Marvel films. Restaurants: More formal – Johanne's, Steakhouse, Chop House, Miro's. Casual – Grind, Lulu's, Dan and Sweet Sue's. All are good places to check out if you're in the Palm Springs area. Sport team: For football it would be the San Diego Chargers. Second would be the New Orleans Saints or the San Francisco 49ers.

Email Servers and Automatic Emails

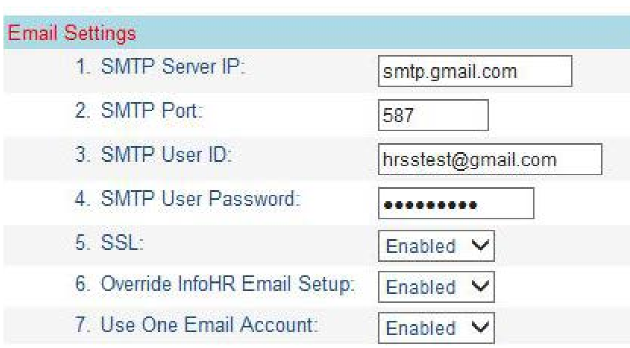
by Mostafa Hasheme, Senior Web Developer

As you probably know, various modules of info:HR generate automatic emails on certain conditions. For example, the Employee/ Manager Self-Serve module generates an email to the supervisor when an employee submits a vacation or time request for approval, and the Timesheets module generates an email to the supervisor when an employee submits a timesheet.

In order to send an email successfully, the module needs to know specifics of the email server to be used. This can be entered on the Email Setup screen in info:HR under Setup / Security…

This screen defines the email address associated with a User ID, and whether or not the user is a supervisor. Beyond that, only the SMTP Server name is required.

An easier way to provide the server information is to use the Application Settings screen of the ESS and Timesheets modules. The Email Settings section allows you to set the values once, rather than having to enter them for each user…



If option 6 is enabled, server settings are taken from this screen rather than the info:HR Email Setup screen.

Enable option 5 if your email server accepts only secured transmission. Although option 5 is labelled as SSL, it also works for TLS.

Option 7 is new with ESS/Timesheets v5.0, designed for clients who would prefer that all automatically-generated emails come from a single account (like vacationrequest@ xxx.com), rather than the email address of the employee causing the email to be generated. We have encountered this requirement with the Microsoft Office 365 mail server, an external cloud server.

If you enable option 7, then options 3 and 4 will define the "From" address for all automatically-generated emails. You will need to set up the email address you want to use, e.g. vacationrequest@xxx.com, as a real address in your system since the ESS/Timesheets modules authenticate the "From" and "To" addresses with the email server each time an email is generated and sent.

If you run into email-sending issues or have any questions for us, please call our support line at 1-800-567-4254 / 416-599-4747, or email us at support@infohr.com.

Partnering with Advanced Tracker

by Michelle Beasley, Business Development Manager

For quite a few years now we've had a strong working relationship with Advanced Tracker Technologies Inc. (www.advancedtracker.net), provider of Employee Tracker, a robust time/attendance/scheduling system popular with small- and medium-sized organizations across Canada. Clients are using info:HR and Employee Tracker to fully manage employee master and attendance data, with real-time sharing of master data.

HR Systems Strategies recently formalized the relationship with Advanced Tracker by becoming an authorized reseller of Employee Tracker. So now, it's "one-stop shopping" for organizations looking for best-in-class HR and attendance management.

I'll be the main point of contact here at HRSS, so if you have any questions or would like to discuss your attendance/scheduling requirements, please contact me at 1-800-567-4254 x 2027 or michelleb@infohr.com.

Webinar update

by Barbara Chicago, Client Service Representative

We have set our webinar schedule through the end of this year and the first half of 2016. We are pleased to see that attendance is strong and feedback positive.

The schedule and instructions for enrolling are posted on the client portion of our web site. You'll need your serial number and password to log in; you can email me at barbarac@infohr.com for that information if you don't have it (sorry, no phone calls).

If you have a topic that you'd like to see addressed in a webinar, please let me know. If it's of interest to you, it will probably be of interest to others. Here's what's coming over the next 12 months…

2015	
Continuing Education, Training Plans	June 17
New Features - info:HR 8.0 and ESS 5.0	September 9
Follow-Ups, Flags, Comments, Leaves	September 16
Continuing Education, Training Plans	October 14
Email Sending Functions	November 18
Reporting	December 16

2016	
Year End Process	January 6 & 13
Email Sending Functions	February 17
Reporting	March 9
Year End Process	April 6 & 13
Follow-Ups, Flags, Comments, Leaves	May 18
Continuing Education, Training Plans	June 15

Got a question? Ask for Support!

by Jerry Rowland, Chief Technology Officer

As I'm sure you know, one of the benefits you receive from your annual support fee is the ability to contact our support line with questions you have. We have a toll-free number (800-567-4254) for clients outside our local (Toronto) dialing area, and a local number (416-599-4747) for those in and around Toronto.

Sometimes it's more practical to email us, especially if you have a screen shot you want us to see. The best way to reach us is to send an email to support@infohr.com.

When you call in, most times your call will be answered by one of our staff. You might occasionally get the automated attendant, but it will be much more common that you're talking to a real person. The fastest way to get connected with someone who can help is simply to say, "I have a support question".

Different staff members are assigned daily to the support line, so it's best not to ask for someone by name, unless you're following up on a previous support issue. If you identify your call as a support call, you'll get right through to the person staffing the support line today; if you ask for someone by name, maybe because you've dealt with them in the past, you may end up having to leave a voice mail because they're busy working on a project.

It's always our goal to answer all calls before they go to the automated attendant, and then to deal with the call as quickly and professionally as possible – especially for support calls. You can help out by making sure you identify your call as a support call so we can get you connected with the right person to help you, without delay.

Welcome New Clients!

Rideau Family Health Team

Woolwich Community Health Centre

Grand Bend Area Community Health Centre

Mount Forest Family Health Team

Let's Talk Science

info:HR
SOFTWARE

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