info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Spring 2016

Finally!! Spring has arrived.

Whether you live in Ontario or the western provinces, spring weather is in the air. Sorry, east coasters, about your snow storm! You can just see it in everyone's faces. People are smiling and have an extra jump in their step. It's unfortunate not one Canadian NHL team made the play-offs, but instead we can enjoy the outdoors, whether your activity of choice is golfing, cycling or walking. It's refreshing to be outside.

I was looking at the list of new clients highlighted elsewhere in this issue. It makes me extremely proud when I look at the quality and diversity of the businesses that have made the decision to invest in our products. We are fortunate to have large groups of not-for-profit and health care clients. These are organizations that are providing valuable services to the people in our communities, whether they are children with autism spectrum disorder or other developmental disabilities, abused or homeless women, and children, teens, or families in need of support. It is a joy for us at HR Systems Strategies to be serving special organizations such as these.

I have worked in the software industry for over 30 years. When the point in my career came that I invested in and joined HR Systems Strategies, it was high on my priority list to seek out something more than a job, but rather an opportunity to make a difference. That was one of the things that attracted me to HRSS. The company's client base was very impressive. While our business is providing HR software solutions to you, our clients, in some small way I feel we are helping you to become more efficient and better able to focus on the important aspects of your business - serving your own audience.

We are fortunate to have a very diverse client base. We have a very large municipal, county and city group of clients. With my Mechanical Engineering education, I get excited every time we add a new manufacturing or auto parts client. I'm always interested to learn about the particular products you are producing and manufacturing. When clients or new organizations express an interest in us, the first thing I do is learn as much as I can about their business. I review their website and read any recent press releases and other news stories they have posted. It's so important for us to know as much as we can about what you do in order for us to be the best HR software provider we can be (and I encourage the same with all of our employees). Whether you are a law firm, a charitable organization, a credit union, etc., you are all very important to us.

Thank you for your continued support. We've had a great start to the year and I hope you can tell I'm excited and enthused about our outlook and of course that spring weather. It's Sunday as I'm writing this, so time to head outside and hit that little white ball!

Andy Staniewski

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

Client Spotlight: Erb and Erb Insurance Brokers Ltd.

by Barbara Chicago, Client Service Representative

Erb and Erb Insurance Brokers Ltd. has been in business since 1919 in the Tri Cities of Kitchener, Waterloo and Cambridge. After 95 years, Erb and Erb remains family owned and operated, and has grown to employ 60 people. The company provides general insurance and financial service products from their head office in Kitchener.

After an exhaustive search in 2014, Erb and Erb selected info:HR and ESS to manage its HR information. The company searched for over a year to find an HRIS that would meet its current requirements and provide the ability for growth and expansion in the future. "We were looking for a long-term solution, not a quick fix. I wanted a system that would grow with our organization while staying on budget," said Shawna Bourke-Heimpel, Human Resources Manager at Erb and Erb.

After preparing a business case and discussions with the senior management team, Shawna compiled a list of requirements for an HRIS. Shawna began researching systems online to see what was available in the market, eventually narrowing her search to 10 vendors, after which she issued an RFQ to each.

The top three choices were invited to demonstrate their products. "I had a long list of requirements and HRSS met most of my criteria; what didn't quite fit we were able to work on together to make it fit for us," remarked Shawna.

Prior to implementing info:HR, Erb and Erb was managing all of its HR information manually, using paper files and spreadsheets. "Producing reports was very time consuming with the system we had in place. Now having all employee information in one system allows me to produce reports, including historical data, very quickly," Shawna explained. "We have also granted our managers access to select data, elevating some of the reporting I was required to do prior to implementing info:HR."

Erb and Erb has implemented ESS to provide a more automated approach to handling vacation and time requests. As she started the rollout, Shawna declared, "Right now we are combining our manual process and ESS. We will be releasing it to our employees soon. I can already see how well this will work in our organization. The managers who have access now really like the new process."

ERB and ERB INSURANCE BROKERS LTD.

Shawna has also been populating the Continuing Education section of info:HR. In the insurance industry, tracking of licensing and continuing education credits is very important to ensure all brokers are compliant with industry regulations. "This is a great feature we did not count on in an HRIS. The reporting will be a tremendous time saver for me," stated Shawna.

HRSS strives to provide the best service while incorporating client feedback into its products. Shawna is no exception to this rule. "The sales process was fantastic; our sales rep was so patient with me throughout the process, answering all of my questions quickly and concisely, without being pushy. My experience with everyone at HRSS has been great; in fact, everyone has been patient and very quick to get me the answers I require," Shawna said.

Client Spotlight: Let's Talk Science

by Barbara Chicago, Client Service Representative

Let's Talk Science, headquartered in London, Ontario, is an award-winning, national charitable organization focused on education and outreach to support youth development. The organization creates and delivers unique learning programs and services that engage children, youth and educators in science, technology, engineering and math (STEM). Through programs, resources and services, they inspire Canadian children and youth of all ages to fulfill their potential and prepare for future careers by supporting their learning and engagement through STEM. Let's Talk Science has excited, inspired and engaged more than three million children, youth, educators and volunteers in STEM since its inception.

Last year, Let's Talk Science upgraded from the Access version of info:HR to the SQL version to take advantage of the latest enhancements, adding Employee/Manager Self Serve and Applicant Tracking capabilities to complete its HRIS suite.

Let's Talk Science became a client of HR Systems Strategies in 2004, using the core administrative module of info:HR. Anticipating growth in its requirements, Heather Small, HR & IS Coordinator, began investigating options to better track employee information.

"We had been using info:HR to store basic information. I had a wish list of what I wanted in a system and I was pleased to find that the SQL version of info:HR was able to accommodate our requirements. Our main goal was to have one system to store all of our information, while allowing our employees the ability to view specific aspects of their personnel files. The end goal was to streamline our process, eliminating email, phone calls and spreadsheets for day-to-day enquires. We have a computer savvy work force that truly appreciates efficiency," Heather explained.

Let's Talk Science has doubled its work force over the past five years and is projected to increase it by 33% over the next two years. "With the growth we have experienced and our projected growth, we wanted a system that could grow with us and was easy to implement and use," Heather added. "HRSS is also a Canadian-based company that specializes in small-to medium-sized organizations and has a great service record. If we require on-site assistance, I know its available. The software also matched our price point, which is always an important factor in the charitable sector."

Heather continued, "Although we are still in the implementation phase, we are looking forward to more accurate and timely reporting capabilities; employees will be able to log in and see the time-off entitlements they have available and make changes to their personal information. Our process will be more automated and there will be less room for human error. I am excited by what info:HR will offer when we are in the process of recruiting for new hires. I will be able to run reports to determine candidate qualifications in a more efficient manner."

When asked about the purchase cycle, Heather said about the HRSS team, "Our requests were always met with prompt and thorough responses. Everyone was very patient with us and walked us though the process step by step, ensuring we received the information we required."

All of us here at HRSS are pleased to see Let's Talk Science upgrade to the latest version of info:HR and include additional modules that were not available to them when they first signed up with us. Our goal is to constantly add new functionality to help reduce the cost and effort of HR administration; now Let's Talk Science will be able to take advantage of it.

Tips and techniques: managing documents

by Hemu Mistry, Manager, Application Development

Hello everyone!! I hope 2016 has had a great start for you all. It certainly has here at HRSS as we recently released our 8.1 version of info:HR with 5.1 version of the ESS and Timesheets modules. I hope you have had the chance to upgrade your info:HR and ESS and Timesheet modules (if you have either of these) with the new releases as I will be talking about one of the two new great features that we have added: the new Document Type code lookup and the Document Attachment mass update option.

Under the document attachment feature of info:HR, and also available in ESS, we have added a new field called **Document Type** code lookup. This field is a mandatory field on the Import Attachment screen, allowing users to categorize the documents being attached to employee records. Using the document type code, you can make confidential types of documents that will be available only to users you wish to share the documents with. And with the new report based on Document Type code you can see the employees who have or do not have these types of documents attached to their HR profiles.

The Document Type field is a lookup code field, so you can create as many different type codes as needed. For each of these type codes you can give users security access to view those documents. The following are the steps you need to take in order to use the Document Type field.

1. Setting Security on the Document Type Lookup field

Since the Document Type field is a mandatory code lookup field, you will need to first give users security access to use this code lookup. For this you need to go to the Codes security screen located under the Setup menu \ Security \ Security Master screen and then under the More Security menu option, for each of the info:HR users. On this Codes security screen look for the Document Types Codes item from the list of codes and give the user at a minimum "Inquire" security rights, which will enable them to at least assign a Document Type code to a document they are trying to attach to the employee's record. The additional Maintain security right will allow users to create/view/change/delete the Document Type codes list. At least one user will need this "Maintain" security right to be able to create the list of various document type codes. You need a minimum one Document Type code created so the users can use it when attaching a document to employee records. A red X will appear beside the Document Type field if the user is missing the minimum "Inquire" security and they will not be able to attach any documents to the employee records.

The user with the "Maintain" rights can now create the list of document type codes and also attach documents to employee records. Please note that every time a user creates a new document type code, and you wish to share this new code with other users, you will need to give other users access to this code (see 2, below) so that they can view and/ or maintain the documents of the employees with the new document type code.

2. Setting Security Access on Document Type Codes

In order for the users to view or maintain documents of employees with a specific document type code, you will now need to give users security access to those codes. To do this, for each user go to Setup menu \ Security \ Security Master screen and then under the More Security menu option select the Document Type menu item. On this screen you will see the list of all the document type codes created in the system so far. For each of these document type codes, set the Inquire rights to allow the user to view documents of that document type, and the Maintain rights to allow users to add, view and delete employee documents with that document type. If you do not wish to give users permission to view certain types of documents based on its document type code then do not give the "Inquire" or "Maintain" security rights on those codes.

For these two security settings to take effect, the respective users will be required to log off info:HR and log back in.

Tips and techniques: managing documents (cont'd.)

Also note that users will automatically get security access of Inquire and Maintain on codes that they create.

You are now set to use this feature of assigning document type codes to the employee documents. With this new feature we have also added a mass update option to update employee documents with document type information as mentioned below.

Mass Update Document Type Information

Since the Document Type is a mandatory field for attaching a document, you will need to make sure all your existing documents that you have uploaded in the system (before the release of info:HR 8.1) have a document type associated to them. For this we have added a new Mass Update option under the Mass Updates menu \ Document Attachment \ Attach Document Type screen. On this screen, for each of the employee screens from where you can attach a document, you can now mass associate the Document Type and/or Document Description to it. You will need to do this at least once for all your documents uploaded in the system prior to Release 8.1 as they do not have any document type information associated to them yet. You also have an option to update only those employee records whose Document Type information is missing using the Replace Existing Document Type Information checkbox so you do not overwrite the document type information that already exists for the documents attached. To use this mass update option simply select the Document Type code and/or enter the Document Description, and then select the screen under Update Document Type Info.on. Depending on the type of the screen you are updating, you may need to enter additional information (you'll be prompted for this). Then click on the Mass Update icon on the toolbar to update the existing documents with appropriate document type information.

Document Type Report

By assigning document type information to each of your employee documents, you can now take the advantage of the new report we have added on Document Types. This is located under the Reports menu \ Document Type screen. This report provides you with the list of employees having certain types of documents and also gives you an option to list employees who do not have certain types of documents uploaded for them.

Tips and Techniques

Did you know you can mass attach documents to employees records in info:HR? Take advantage of our new mass attach documents option, added under the Mass Updates menu \ Document Attachment \ Import Attachment Files. You can only mass upload one type of document based on one type of screen at a time. First, rename the documents you wish to attach to employee records with their respective info:HR employee numbers. Then, select the screen you wish to attach the documents on and, using the Import from Path, select the folder where these documents are located. Thereafter, select the documents you wish to attach using <shift> or <ctrl> keys for multiple select; enter the Document Type information and check the Replace Existing Attachment checkbox if you want to replace the existing documents. Finally, click the Mass Update icon on the toolbar to attach the documents to the employee records on the respective screen selected.

If you need any assistance or have any questions on above, please call our Support line at 1.800.567.4254 or email us at support@infohr.net. Our support staff is always there to assist you promptly.

We hope these new features and many more that we have added in Release 8.1 of info:HR are valuable to you. You can check out our Summary of Release 8.1 Changes document on the client portion of our web site for all the new features in Release 8.1. See you in our next issue!

Webinar Schedule 2016 - 2017

WEBINARS 2016	DATE	TIME
New Features of info:HR 8.x & ESS 5.x	SEPT 14	1PM
Security Templates	SEPT 21	1PM
Work Schedule & ESS	OCT 19	1PM
Email Sending Functions	NOV 16	1PM
Reporting	DEC 14	1PM
WEBINARS 2017	**DATE**	**TIME**
Year-End Process	JAN 11	1PM
Email Sending Functions	FEB 15	1PM
Reporting	MAR 22	1PM
Year-End Process	APR 19	1PM
Security Templates	MAY 17	1PM
Continuing Education and Training Plans	JUNE 14	1PM

To register for the above webinars, please send an email to support@infohr.com. In the subject line of your email indicate the webinar of interest. Space is limited, so in fairness to others please register only if you fully plan on attending. Also, if there is more than one interested party at your organization, share the registration and webinar log in.

You will receive a confirmation that you have been registered. Monday prior to the webinar you will receive a link and any supporting documentation for the upcoming webinar.

Whenever possible, we like to create an interactive environment during our webinars; we encourage questions throughout the webinar. Please, when you are attending mute your telephone or computer microphone to minimize the background noise for other attendees.

Welcome New Clients!

- Centre francophone de Toronto
- Family & Children's Services of St. Thomas & Elgin
- Oxford-Elgin Child & Youth Centre
- Peterborough Family Health Team
- Phoenix Centre for Children & Families
- Scott Steel Erectors Inc.
- Windsor Family Credit Union Ltd.

info:HR
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