# info

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

Wow! In my nine years with HR Systems Strategies Inc., I don't think I've seen a year like 2016. It seems like we had everything and more. We started the year with completing an upgrade of our network system with two brand-spanking-new servers, with one dedicated to our growing list of hosted clients. It was quite the project, but the new systems have been very reliable and will provide a good foundation moving forward.

It seems like the team has been running hard all year from start to finish. We like to be busy and we appreciate the decision many new clients made to join the growing info:HR user community, and the support of our existing client base using our support line, training services, and engaged in projects with us. Thank you!

And finally there was the recent office move into Toronto to cap the year off. The holidays can't come soon enough for us to catch our breath.

I'm sure 2017 will bring new challenges and focuses. In addition to our office move to Toronto, we will work hard to grow our client base on the west coast. On behalf of the team at HRSS, we thank you for your continued support and wish you a happy and safe holiday season. See you in 2017!

*Andy Stanienski*

**HR SYSTEMS STRATEGIES INC**
HUMAN RESOURCES SYSTEMS

# Give credit where it's due: dedicated HR team oversees successful implementation

## by Barbara Chicago, Client Service Representative

WFCU Credit Union has long been recognized as one of the leading, progressive financial organizations in the City of Windsor and Essex County. Serving Windsor and surrounding communities for over 75 years, WFCU Credit Union began in 1941 with assets of less than $10,000 and now has $2.9 Billion in Managed Assets and Member Service Totals of $4.0 Billion. WFCU Credit Union is the sixth largest credit union in Ontario, operating nine retail locations and serving 37,085 members, including 33,195 personal members in 17,330 households, 2,390 businesses and 1,500 organizations. WFCU Credit Union membership is open to anyone who lives and/or works in Ontario.

With a long-standing mission to 'provide services and a full range of highest quality financial products to make our community the best place to live and work', WFCU Credit Union stands true to its vision: Quality, Convenience, Innovation, Open to Everyone and Yours to Own.

Prior to purchasing info:HR, WFCU Credit Union's employee information was stored and maintained within Excel spreadsheets. Multiple Excel books were maintained for different reporting purposes (e.g. employee information, position changes, retiree information, etc.).

Drawing reports was very time consuming and required at least three team members for verification to ensure no copy/pasting or manual errors were made..

Training was completed in one week with Sheila Geddes, Vice President, Human Resources, and Celesta Gaba, Human Resources Coordinator, being the participants in formal training. Sheila and Celesta elected to become the trainers for other members of their team.



Celesta Gaba

They chose this style of training to ensure that the focus was on implementation of info:HR. After formal training, two additional members of the team were to be trained on the system's use and functionality. This approach for training was selected for a number of reasons, the primary reason was efficiency.

"We had scheduled the time in advance and cleared our schedules, putting a back-up plan in place so that we could focus solely on the implementation process," Celesta explained.

Celesta personally liked this approach. With a clear understanding of her own learning style, in creating a plan such as this she was able focus on info:HR and the requirements of the system. The one-week focus allowed her to immerse herself in the system and learn about its features and functionality with minimal interruption, enabling her to become the expert she is now.

She now devotes one day a week to the system for the purposes of maintenance and continued learning. When asked how she feels about her comfort with the system after training, Celesta responded, "I feel very confident with the system, it is very intuitive and easy to use. I am a person who likes to click around to get to know any system and the layout of the system, coupled with the manuals provided online, are logical and very simple to follow." Celesta has successfully trained one team member internally and the fourth will be trained in February of 2017.

There were two customizations required by WFCU Credit Union. The first was a feature unique to them, where the executive team and employees are identified as separate groups, enabling department security to show employees by level. Sheila will manage the executive team's confidential information and the balance of the employees will be managed in the system by Celesta, as required by the organization.

The second was an enhancement to allow the recording of multiple charges on the Dollar Entitlements screen so that employees could view in ESS the usage of their dollar entitlements. WFCU Credit Union's benefits are managed as banks for each employee; they have chosen to utilize the Dollar Entitlement screen to manage these banks. This customization provides the ability for employees to have one source for their personal data; they are now able to log in to ESS to see the usage of their personal benefits through this enhancement.

"In the past employees would call HR to check to see what the remaining funds in their entitlement were or to find out when their entitlement renewed. Now employees are able to log in and see for themselves what they have left. HR is no longer the gatekeeper for the information, which allows us to focus on other tasks," explained Celesta.

"Another thing we can do with this enhancement is pull reports on benefits used, enabling us to reconcile our benefits and report to management on usage of benefits," said

Celesta. "We also appreciate how much cleaner the tracking is for us now; we were entering all of the information on Excel spreadsheets previously and verifying usage of various benefits was time consuming."

An additional project headed by the IT team is utilizing the database in info:HR to drive other activities and portals within the organization to streamline other HR processes. Currently the info:HR database is used to populate an electronic employee directory referred to as the yearbook. IT has created a program to read the info:HR database for specific employee information to populate various aspects of the yearbook, which is available online for employees to access. This is now done in real time; when information has changed or been added to info:HR the yearbook is automatically updated, again saving HR more time. Previously the HR team would be required to update two databases with data changes.

The IT Team is now in development of another program that will enhance the onboarding process in the organization, again using the info:HR database as the triggering source of information. The goal will be to automatically generate system user IDs, telephone extensions, and email setup, also making adjustments when information is changed in info:HR.

The implementation of info:HR took two weeks for WFCU Credit Union, due in great part to careful planning and team dedication to the implementation process. ESS will be implemented sometime in the spring of 2017, and Celesta expects this implementation will be as seamless as the info:HR one.

# Tips and techniques:
# The Holiday Master

*by Hemu Mistry, Manager, Application Development*

## Season's Greetings Everyone!

As we roll happily into our holiday season in this issue, it leads me to talk about our Holiday Master function in info:HR.

This function is located under the **Mass Updates menu \ Entitlements \ Holiday Master.** You can use this screen to set the holiday schedule for the year or for the years ahead in advance, as each set of holidays is stored under its respective year. You also have the option to enter dates based on the **Section, Province of Employment** and/or **Province of Residence** that qualifies for this holiday.



To start using the Holiday Master, if you have not already used it before, is first to set up the list of holidays using the New Record icon on the toolbar. Enter the Holiday Date, Name of the Holiday, and if applicable enter the Section, Province of Employment and/or Province of Residence and save the record. If all the employees qualify for a particular holiday then leave Section, Province of Employment and Province of Residence blank. Enter the rest of the holidays

this way. You can then view the holidays list by Year, by selecting the year under the **"Year"** drop down list.

Once the Holiday Master is set up for a particular year, you can update an employee's Attendance screen with these holidays with the Attendance Reason code **"STAT"** for Statutory holiday. To do this use either the **"Update Attendance with SELECTED Holiday(s)"** button or "**Update Attendance with ALL Holidays"** button. To update employees with specific holidays, click on one of the Holidays to update in the grid box, then while holding the CTRL key click on other Holidays for multiple holiday selection. Once you have selected one or more Holidays this way click on the **"Update Attendance with SELECTED Holiday(s)"** button to update the Attendance records of the employees. If you want to update employees with all the holidays then you don't need to select them all, simply click on the **"Update Attendance with ALL Holidays"** button.

The system will prompt you to confirm the update and also tell you how many employees will be updated with these holidays. The employees will only be updated based on the **Section, Province of Employment** and **Province of Residence** of the employee if a holiday has these values defined, otherwise all the employees will be updated. If you want to update only a group of employees by Category, then there is a selection criteria field available to select one or more Categories.

If you are using the ESS and/or Timesheet web modules, then this Holiday Master is used there as well. The system will automatically recognize the requested day in ESS as a holiday and will not count it in the total number of days requested, and in the Timesheet module the respective holiday will appear in different color.

If you do not want to use the Holiday Master feature in ESS and Timesheet, then you can easily turn it OFF from the **Application Settings** page under **Feature Settings.**

As we know, the same set of holidays occurs every year. We have provided an option to copy these holidays of the selected year to the next year to save time with re-entering them. To do this, select the year from the Year drop down list to duplicate the holidays from and then click on the **"Duplicate for Next Year"** button, at the confirmation prompt click on **Yes.** This will create a list of holidays with the same Holiday Name, Section, Province of Employment, Province of Residence and same dates but with the next year. You can then edit and save the specific holidays that may have a different date in the next year.

Also, if you want to delete the holiday setup for a particular year, then you can do so by first selecting the year from the **"Year"** drop down list and then clicking on the **"Delete Year"** button.

If you have any questions or comments or need any assistance with this feature or any other functionality in info:HR or ESS or Timesheet, please do not hesitate to call our support line at 1-800-567-4254 or email us at support@ infohr.com.

Also, for many of you December would be the last of month of the entitlements period and running the Year End procedure in info:HR will be on your mind. I recommend that you download the latest Year End Procedure documentation from our website or email us at support@ infohr.com to get a copy. If you need one of us to go over the Year End process with you over the phone, please call our support line or email us at support@infohr. com to book a time with one of our support staff.

I hope this section has been informative as previous ones. Wishing you all a very happy and safe holiday season!

Once again see you all in our next issue!
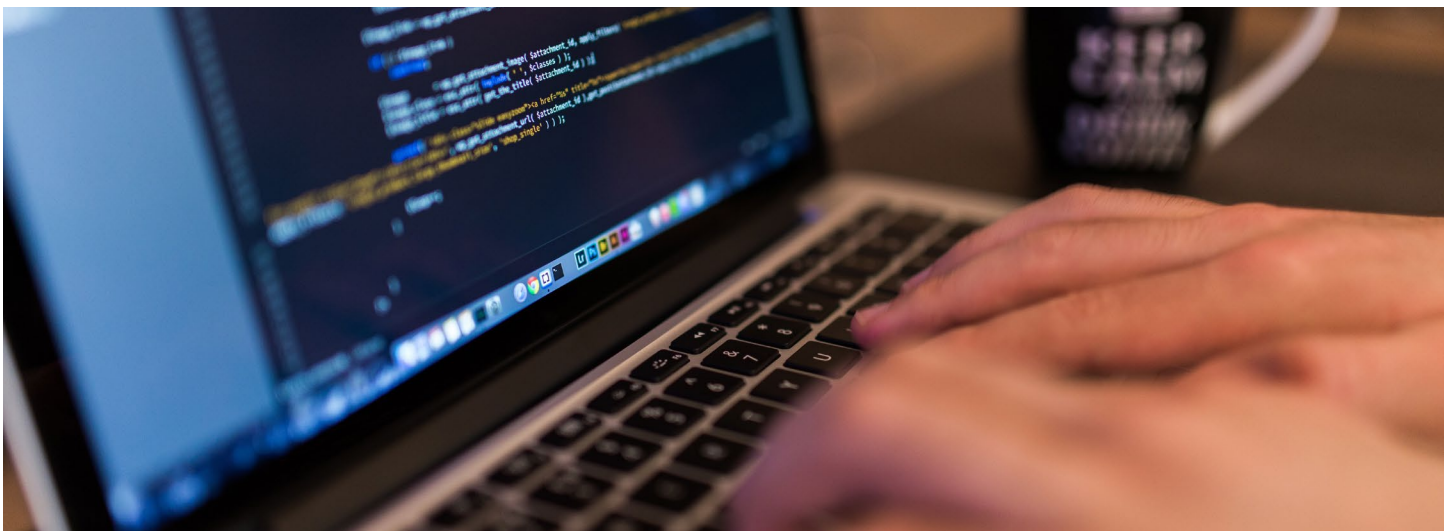
# Webinar Schedule 2017

| WEBINARS 2017 | DATE |
| --- | --- |
| Year-End Process | JAN 11 |
| Email Sending Functions | FEB 15 |
| Reporting | MAR 22 |
| Year-End Process | APR 19 |
| Security Templates | MAY 17 |
| Continuing Education and Training Plans | JUNE 14 |

**Please note that all webinars start at 1PM Eastern Time.**

To register, 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 supporting documentation.

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.

# Congrats to our winner!



**Congratulations to Andrea Bull, HR Manager at the County of Haliburton. Andrea won our draw prize of a Keurig coffee system at the Ontario Municipal HR Association fall conference.**

# Welcome to our new clients

| Marvin Windows and Doors |  |
| --- | --- |
| Sudbury and District Health Unit |  |

**info:HR** SOFTWARE

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