



HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Spring 2017

Yeah!! Spring is finally here. I do my best to get through the winter months, but relieved when the spring months arrive. Warmer temperatures, outdoor activities, budding plants and trees, cherry blossoms, patios opening are just a few of the things that I love about spring. I live near Trinity Bellwoods Park in Toronto and close to Stanley Park in Vancouver and it's invigorating to see all the activity outside. My big new "thing" is cycling. I purchased a new bike and so happy to be taking advantage of the many bicycle paths and trails in the city (the picture is a view of the Toronto skyline one early Sunday morning cycle from Tommy Thompson Park). I do it to boost my level of physical fitness, work off the excess winter pounds, and also for my emotional well-being. It's great to have time alone doing an activity where I'm able to reflect, think, plan, and move forward. I hope all of you are similarly motivated this spring/summer season to pursue new and old activities and hobbies.

At HR Systems Strategies Inc., the first few months of the year have been similarly invigorating and busy. Historically, in our industry, the first quarter of the year will be slower than other quarters, but not so this year. We are thrilled with the new clients that have joined the growing info:HR user community, as well as the continued support from existing clients. You have kept us on our toes and there isn't any other way we'd want it. It's great to be busy! We've done a ton of training, implementation projects, client visits, webinars, and the support line has been buzzing with calls. Jerry and his team have been planning and working on new releases of info:HR, ESS, and other modules. I know he has been carefully considering your valuable feedback.

I hope you enjoy reading this Spring issue of info. We enjoy putting it together for you. It's another way for us to stay connected.

Happy Spring everyone! All the best with your personal and professional goals over the next few months. And I've just been told by my partner that on top of cycling, I'm starting yoga this weekend! Ugh.

Andy Stanianaki



IN THIS ISSUE

Crossroads Children's Centre launches ESS/2 New clients/3
Tips and techniques/4 Put your logo on the ESS/Timesheet Login Screen/6
Let us host you/7 Webinar schedule 2017-18/8 ESS Release 5.2 is coming!/8



Crossroads Children's Centre launches ESS

by Barbara Chicago, Client Service Representative



ESS has been successfully launched at Crossroads Children's Centre!!

The Crossroads Children's Centre has been providing treatment and support in the Ottawa area to children and their families dealing with complex mental health challenges for the past 20 years. In late 2012 they chose info:HR and the employee/manager self serve module (ESS) to assist with tracking and automating their Human Resources processes. Like many organizations, prior to info:HR all entitlement banks were managed using paper and spreadsheet processes.

"I was getting calls on a regular basis from employees asking how much time they had available; managers were keeping records of their own as well. As you can imagine, this process was not working for us at all," explained Lynn LaHam, Director of Finance.

When Lynn saw a demonstration of info:HR and ESS, she realized there was a much better way to track the multiple time banks, and employees could in essence manage their own time. "I was so relieved to see that we would one day be able to automate these processes and empower our employees," she commented.

The final goal of automation and empowerment of employees has now been realized by launching ESS to a group of approximately 65 employees organization-wide.

Lynn was very pleased to inform HRSS, "ESS has been launched to all employees at the Centre and the launch went smoothly. ESS has been very well received by everyone; they really like the software. The work has paid off!"

As the Director of Finance and managing the HR duties for the organization, the project was planned over the course of a few years. Completing milestones over the course of this project has brought Lynn to the end with great success.

Crossroads has a very complex entitlement structure. With ESS employees are now able to manage their time banks on-line, providing more accurate and timely entitlement tracking. Always looking forward, Lynn is now making plans to enhance the use of ESS, launching the mobile version of ESS in 2017.

The final stage of the project for Lynn, not in the original scope, was to move to the hosted info:HR solution. "We wanted to allow our employees to access ESS at any time and from any place. Our work force is mobile and our employees are not always in the office, so going hosted for us means that our employees can access their ESS when they need to without the requirement of being in our offices. It is great! Employees have received the system with enthusiasm and they feel responsible for keeping their own time banks up to date," explained Lynn.

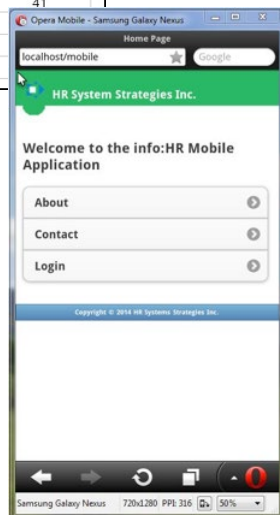
"It was a long project, but I am glad we are now finished. ESS has made things so much easier."

A common concern with a number of organizations using ESS is allowing access to their networks and servers from outside the organization. With a move to the HRSS hosted environment, employees at Crossroads are able to access their ESS from anywhere they have an Internet connection. Submitting time requests, checking balances on the go from their cell phone, tablet and yes, even their personal computer. This solution is perfect for a mobile work force such as at Crossroads.

HRSS does provide info:HR hosting services, which you can read about elsewhere in this newsletter. This alternative gives clients the option to have HRSS host info:HR, freeing them from maintenance of servers and updates while allowing safe and secure access from any Internet-enabled location. HRSS hosts the database, providing a secure portal to the data stored in Ontario. The concern of allowing a portal through the client's firewall is eliminated.

In with the new and out with the old at Crossroads Children's Centre

	A	B	C	D
1	Name	Vacation Outstanding	Sick Outstanding	Personal Outstanding
2	Bradly Kierstead	21	15	22
3	Charlotte Feldt	24	46	13
4	Deedra Jin	6	12	41
5	Faye Murph	2	7	19
6	Jeanne Danna	45	48	17
7	Mariela Butterfield	12	9	2
8	Rueben Boyd	6	5	41
9	Seth Mroz	12	24	
10	Sherice Bloyd	6	30	
11	Winnie Adkisson	26	45	



Welcome to our new clients

Women's Rural Resource Centre of Strathroy & Area

Northumberland Family Health Team

ONE CARE Home & Community Support Services

Treaty 4 Education Alliance

Interim Place

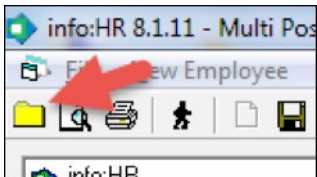
Tips and techniques: Frequently asked questions

by Hemu Mistry, Manager, Application Development

Hello everyone! A few issues ago our experts provided help on questions we get on a fairly regular basis. We have more of these to discuss, so without further delay...

Q: How do you skip a New Hire screen while in the middle of the New Hire Procedure?

A: Sometimes we know that you may not have all the information available while entering the new hire in info:HR. During those times, you may need to skip the respective screen and proceed to the next. You can easily do this by clicking on the yellow folder icon on the toolbar (top left corner of the screen)

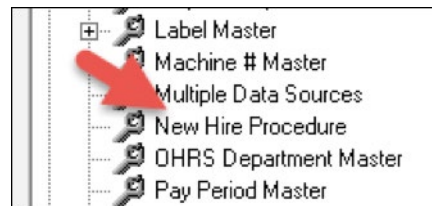


or you can click on the gray "x" button located on the top right corner of the screen.



At a later time when you have the information available to feed into the system, simply open the respective screen directly from the **Employee menu** and enter the necessary information.

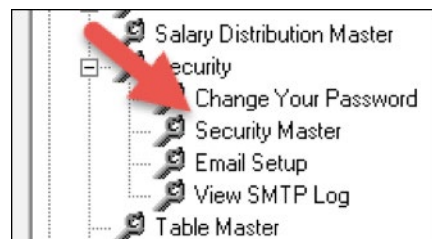
If for some reason you do not want this specific screen to be part of the New Hire Procedure, then you can go to the **Setup menu \ New Hire Procedure** screen



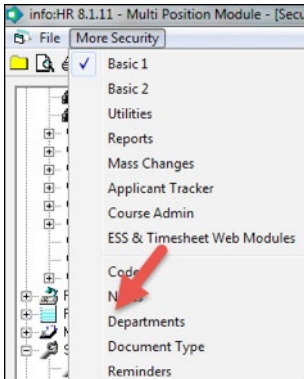
and uncheck the specific screen that should not be part of the new hire procedure and save the changes. Log off info:HR and log back in for the change to take effect.

Q: Managers/Supervisors cannot see their employees or cannot see themselves.

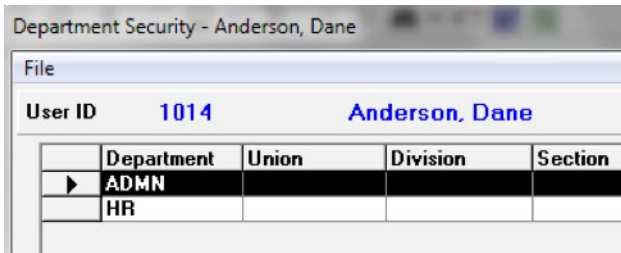
A: This is a very common question. The employee listing in the info:HR, ESS and Timesheet modules is based on the Department Security of the logged-in user. Therefore, if a Manager, a Supervisor or a regular user cannot see their employees or themselves that means the Department Security of this user does not include the missing employee's group as part of their department security setting. To resolve this issue, go to the **Setup menu \ Security \ Security Master** screen.



Select the user missing the employees, then go to **More Security menu option \ select Departments.**



On this screen verify if the department security group(s) setup includes the missing employees.



If not, then you may a) add a new group that includes the missing employees; b) make changes to the existing group settings; or c) use the **“Include Employee Numbers”** field to include the missing employees by entering their Employee numbers.

On the other hand, if for some reason you want to exclude specific employees from this user’s employee listing without making changes to the department security group(s), then you can use the **“Exclude Employee Numbers”** field to enter the Employee numbers to exclude. For the changes to take effect, have the user log off the info:HR / ESS / Timesheet module and log back in.

Q: Supervisor sees only him/herself in the employee listing in info:HR / ESS / Timesheet.

A: This usually happens for a new supervisor, where they don’t see an employee listing of the people reporting to them. Go to Setup menu \ Security \ Security Master screen, select the user who is seeing him/herself only, go to **More Security menu option \ select Basic 1** screen, uncheck the **“Employee Number Based Security”** checkbox and save the changes.



For the changes to take effect, the user must log off the info:HR / ESS / Timesheet module and log back in.

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.com. Our support staff is always there to assist you promptly.

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

Put your logo on the ESS/Timesheet Login Screen

If you use either the employee/manager self serve or online timesheet module, chances are you are still displaying the standard info:HR logo. But, with a few minutes of configuration, you can put your own logo there in place of ours. It's easy...

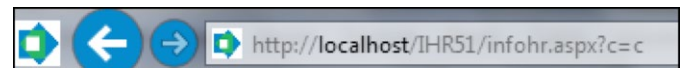
There are two locations for logos. A big logo can be displayed right under your organization name, like the picture on the left. A smaller logo can be displayed above the selection menu, like the picture on the right.



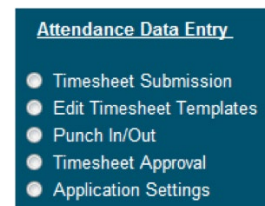
The two logo files can be any image type. The examples here are PNG files. Have your IT group copy your logo files to the IIS server, in the folder .../inetpub/wwwroot/<your ESS-timesheets folder, possibly called IHRWebDN>/customer logo/.

Next, you have to tell the ESS/Timesheet module the names of the two files. The ones here are "biglogo.png" and "tinylogo.png". These names must be entered on the Application Settings screen.

To update the application settings, make sure all users are logged out of the ESS/Timesheet module. Go to the ESS/timesheets login screen. In the address bar make sure that "c=c" appears after the question mark...



That will provide you with an extra menu option, Application Settings...



Log in to application settings with your administrator user name. Set items 16 and 18 as follows...

16. Login Page Logo:	customer logo/biglogo.png
18. Top Logo:	customer logo/tinylogo.png

Tab out of both fields and click on Save Settings at the bottom of the screen. That will take you back to the login page. You may need to refresh the page to see the logos.

You may find that the top logo is too big for the space provided. Use a picture editor to resize the logo. The sample image here is 70 pixels high, which works quite well. It's better if you do this before you give the logos to IT for saving in the customer logo folder; that way, they'll only have to do it once, rather than after each resizing exercise.

If you have any questions or need help, please contact us at 1-800-567-4294 or support@infohr.com.

Let us host you

by *Bill Kennedy, Manager, Business Development*

Do you know that HR Systems Strategies now offers the ability to host your info:HR implementation remotely using our servers and not your own? The way you work with info:HR does not change; it's the same set of modules as you use now, just stored in a different location. A new icon on your desktop launches info:HR securely on our server. The look and feel of the product remains unchanged. Users accessing the web product are given a new secured web address to add to their favourites.

Why consider the change?

- No more waiting for your technical staff to perform any tasks on info:HR.
- All module updates or service patches are maintained by us and not your local IT department or 3rd party provider.
- Nightly database backups are completed and maintained by HRSS technical staff.
- Your data is maintained and stored in a Canadian state-of-the-art datacenter (Rogers Data Centres) located in downtown Toronto. You can think of the application as being "in the cloud", but in this case you actually know where "the cloud" is!

Port Hope Northumberland Community Health Centre in Port Hope, ON made the switch in August of 2016. Taryn Rennicks, Director of Corporate Services, comments, "Like all healthcare organizations, the Port Hope Northumberland CHC is working to improve systems and efficiencies. Moving info:HR to a cloud-based system was a cost effective and simple process. The transition from in-house hosted to the cloud was seamless."

If you'd like to learn more or discuss any particular details, please email me at billk@infohr.com.



"Like all healthcare organizations, the Port Hope Northumberland CHC is working to improve systems and efficiencies. Moving info:HR to a cloud-based system was a cost effective and simple process. The transition from in-house hosted to the cloud was seamless."

Webinar schedule 2017-18

WEBINARS 2017

	DATE
Security Templates	May 17
Continuing Education, Training Plans	June 14
New Features of info:HR 8.x and ESS 5.x	September 12
Security Templates	September 19
Flags, Follow Ups, Comments and Counselling	October 17
Continuing Education and Training Plans	November 14

WEBINARS 2018

	DATE
Year End Process	January 9
Mass Updates	February 13
Reporting	March 20
Year End Process	April 10
Security Templates	May 15
Email Sending Functions	June 12

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

To register, please email support@infohr.com with the webinar of interest indicated in the subject line. You will receive a confirmation that you have been registered. Monday prior to the webinar you will receive a link and supporting documentation. Space is limited, so in fairness to others please register only if you fully plan on attending. If there is more than one interested party at your organization, please share the registration/webinar log in. Whenever possible, we like to create an interactive environment during our webinars; we encourage questions throughout the webinar. Please mute your telephone or computer microphone to minimize background noise.

ESS Release 5.2 is coming!

We have started work on a new release for the employee/manager self serve module. This release is scheduled for Fall 2017 and will include some of the following changes: The look and feel on certain pages will change. For those pages (like the Performance screen) that have a summary list of items in a grid box at the top and the detail of the currently selected item below, on the new pages the grid box will show first and once a particular row is selected in the grid box, the detailed page is displayed. This is the same method currently used when accessing the vacation/time request and request authorization pages. An Employee Course Administration function with workflow is being added. New pages include:

**Course catalog • Course calendar • Ability to view required courses based on your current position or training plan
Ability to request attendance at a course or seminar • Supervisor Approve/Reject of the requested course or seminar
Ability to generate attendance records • New Reports (as defined later in the development)**

Development will take place over the summer, and we'll send out an email announcement to all clients when the new version is available. Barbara Chicago is planning on providing a "what's new" webinar in the fall, so the webinar schedule published in this newsletter may change slightly, depending on the actual release date of ESS v5.2.

Jerry Rowland, Chief Technical Officer



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