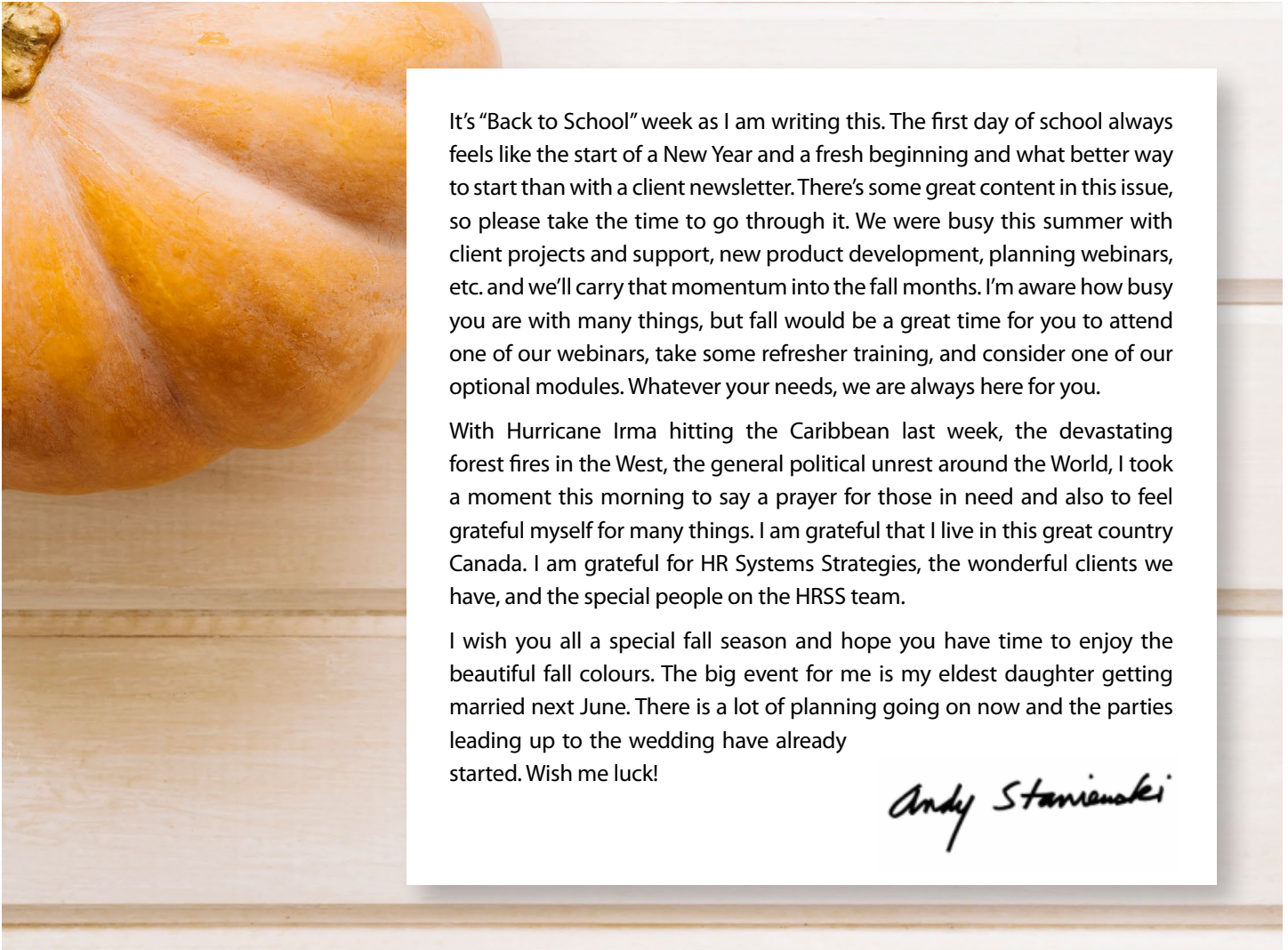




HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Fall 2017



It's "Back to School" week as I am writing this. The first day of school always feels like the start of a New Year and a fresh beginning and what better way to start than with a client newsletter. There's some great content in this issue, so please take the time to go through it. We were busy this summer with client projects and support, new product development, planning webinars, etc. and we'll carry that momentum into the fall months. I'm aware how busy you are with many things, but fall would be a great time for you to attend one of our webinars, take some refresher training, and consider one of our optional modules. Whatever your needs, we are always here for you.

With Hurricane Irma hitting the Caribbean last week, the devastating forest fires in the West, the general political unrest around the World, I took a moment this morning to say a prayer for those in need and also to feel grateful myself for many things. I am grateful that I live in this great country Canada. I am grateful for HR Systems Strategies, the wonderful clients we have, and the special people on the HRSS team.

I wish you all a special fall season and hope you have time to enjoy the beautiful fall colours. The big event for me is my eldest daughter getting married next June. There is a lot of planning going on now and the parties leading up to the wedding have already started. Wish me luck!

Andy Staniewski

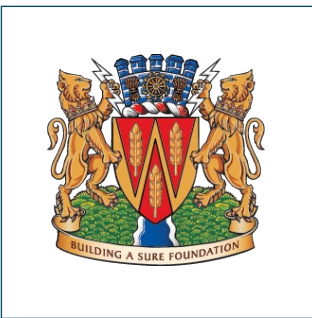
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Township of Wilmot: Collaboration leads to efficiencies and continuous improvement

by Barbara Chicago, Client Service Representative



A small municipality just west of Kitchener-Waterloo, the Township of Wilmot has been a client of HR Systems Strategies for almost a decade. Initially purchasing info:HR for 200 employees with a interface to the Easypay payroll system,

within two years they increased their license limit to 300 employees, where it now stands.

Lorena Caprar, Manager of HR for the Township, has been an active user of info:HR since she arrived in 2011. Lorena came with a large body knowledge of info:HR that she gained from her previous employer since 2007, where she was responsible for managing employee data, attendance and reporting.

In her role with the Township she was exposed to more of info:HR and its functionality. Over the years she has become a strong user of the system, continually looking for better ways to take advantage of the system in her organization to streamline what were manual processes.

Naturally, when the info:HR User Group began in 2014 Lorena was excited to join, saying "What a great idea for smaller organizations - we can celebrate our successes and get ideas from each other."

This User Group began as a municipal client group and quickly expanded to include many of our clients from other business environments. The group meets quarterly to share ideas and ways in which each client is using the system in their respective organization.

The group was started by clients and is run by clients; HRSS was invited to attend group meetings shortly after it began, providing users with immediate answers to questions raised during the meetings.



Lorena Caprar, Manager, Human Resources, Township of Wilmot

"The group really helped me move forward to purchasing the new modules. It helped me plan out what I wanted to roll out and gave me a great picture of the end result, what I could expect. One of the other members has the exact same systems as I do," stated Lorena.

In 2016 Lorena began a significant project, with the purchase of the ESS and Timesheets modules and an enhancement to her payroll interface currently in operation.

"I was a little hesitant with such a large project at first. But ESS was easier than I thought it would be to implement; I wish I had done it sooner. It has really helped me save a lot of time. Instead of entering all attendance manually I now simply audit the entries made by employees and approved by management," she explained.

Lorena has superior info:HR reporting skills and is able to use this knowledge to pull the data needed by payroll staff to manually complete payroll.

Lorena is now in the process of implementing the Timesheet Module. Currently she is working on entering employees' profiles. "This from experience seems to be the most difficult part of the launch," Lorena commented. As with any implementation the planning is the most important step toward an effective execution.

"I am looking forward to the time savings. If ESS is any indication, Timesheets are going to continue to save us more time," she added. Currently payroll staff is responsible for manually entering paid time into the payroll system. When asked what she sees as a greater benefit she said, "Supervisors will be able to manage their employees' timekeeping in a more efficient manner; this will also reduce the probability of errors. The system naturally creates audit checks - employees are responsible for entering time and managers for approving, from there we simply need to audit the hours entered".

The last and final stage of the project is to automatically transfer the data to payroll. At this time the payroll interface transfers basic employee data, which works very well; without this feature there would be a requirement to manually enter employee data into the payroll system. Lorena pointed out, "My goal with the enhancement is that all hours to be paid are collected from ESS and Timesheets and will transfer to payroll. Again, my responsibility will be to audit check, removing the manual data entry of paid hours".

The project has taken more time than Lorena has liked due to competing priorities, however when asked about the project's completion Lorena concluded, "I am excited to see this project complete. Timesheets have been rolled out to our full-time employees and my intention is to have the system rolled out to our part-time employees by the end of this year, with complete data transfer into payroll by early next year."

HR Systems Strategies provides support in various ways: from email, telephone and webinars to attending user-driven groups. We make every effort to reach out to our clients and assist them in any way possible.

“

"The support I have received during this project has been wonderful. I have had lots of questions and I can usually get an answer in the same day. It is really comforting to know there is someone there to run scenarios with and guide me with such a large project."

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When asked about the support options available to her, Lorena enthused, "I have attended webinars in the past, and they are great. This year I will be signing up for any webinar related to ESS and Timesheets so that I can become more comfortable with the programs. They are a great way to get a refresher."

As always, we at HR Systems Strategies encourage our clients to call on the expertise of our implementation specialists to maximize their use of info:HR, freeing up time to focus on value-added activities within their organizations. Webinars and User Groups are a great way to share the wealth of knowledge and experience of all the participants.

Tips and techniques: Correcting an employee's vacation and/or sick time

by Hemu Mistry, Manager, Application Development

Hello everyone!! I hope you all had a great summer – it's hard to believe that it's over already.

Occasionally we get calls from you telling us that an employee's **Vacation** and/or **Sick Time** balance is not displaying the proper value. There could be number of reasons for this:

1. The time-off balances are blank when viewed in Days but correct when viewed in Hours

If the Vacation / Sick Time shows in hours but not in days then make sure employee's **Hours per Day** is filled in on his/her **Current Position** record on the **Position** screen under **Work History/ Compensation** menu.

Position Code: HRCLK HR CLERK
 Start Date: Dec 14/93 Tuesday
 Rept. Authority 1: 1012 King, Deborah
 Rept. Authority 2:
 Rept. Authority 3:
 Rept. Autho:
 Hours/Day: 8
 Hours/Week: 40
 Hours/Pay Period: 80

Current Position Record

Also, make sure the employee has a Position record marked Current.

2. Time Taken is missing or in error

If an employee's Taken balance is not showing or is incorrect then check the Entitlement Period on the **Vacation and Sick Overview** screen under the **Attendance/Entitlement** menu.

HOURS						
	Previous	Current	Taken	Outstanding	Based On	Date Range
Vacation	443.00	240.00	16.00	673.00	Entitlements Date	Jan 1/17 - Dec 31/17
Sicktime	221.00	40.00	0.00	261.00	Entitlements Date	Jan 1/17 - Dec 31/17

If it is not correct or blank then go to **Mass Updates menu \ Entitlements \ Vacation Entitlement Master** screen (and/or **Sick Entitlement Master** screen) and make sure the employee belongs to one of the rules set up on this screen. Verify the employee's data with the respective rule and make the necessary changes. Then go back to **Attendance/ Entitlement menu \ Vacation and Sick Overview** screen, highlight the employee and click on the "**Recalculate 1 Employee**" button at the bottom. This should fix the Entitlement Period and show the employee's Vacation and/or Sick Time Taken correctly.

3. Current year's accrual is incorrect

If the employee's Current balance is incorrect then it could be because the employee is not part of the Vacation/Sick Entitlement Master rules or the employee's entitlement calculation-related data is not set up correctly. Check the following and make the necessary changes.

- Go to the **Mass Updates menu \ Entitlements \ Vacation Entitlement Master** screen (and/or **Sick Entitlement Master** screen) and make sure the employee belongs to one of the rules set up on this screen.
- Make sure the employee's "Entitlement based upon" date is entered correctly on the **Status/Dates** screen under the **Employee** menu.
- Make sure the employee has Current marked Position record on the **Position** screen under **Work History/ Compensation** menu. This would usually be the top row in the list.

- Make sure the employee has **Hours per Day** and/or **FTE** filled in on his/her **Current Position record** on the **Position** screen under **Work History/Compensation** menu.

Once these changes are complete, depending on your rule, you may need to manually enter the correct Current entitlement. If the entitlement rule is **Monthly** then the fixes done above will be in effect from the next month's entitlement update but for the entitlement balance earned up to the current month you will need to manually fix the Current value on the **Vacation and Sick Entitlement** screen under the **Attendance/Entitlement** menu. If the entitlement rule is **Annual or Annualized Monthly** then you can either

Zero Out the entitlement for all the employees in that group and re-run the entitlement update for that group only or simply correct the entitlement of the employee manually for the current period.

If none of the above suggestions works then please give us a call and we will be happy to help you resolve this issue.

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

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

Software versions we support *by Jerry Rowland, Chief Technology Officer*

info:HR and the web-based ESS and Timesheets modules operate in a Microsoft environment, using various Microsoft components, along with a few others from various other sources. That support on our part is always a moving target, since Microsoft and the other providers will introduce new versions and drop support for older versions of their modules on a fairly regular basis, most notably with the web browsers. Here are the main components we use and the supported versions as of this writing (early September, 2017).

ON THE SERVER	Microsoft Windows Server 2012 R2 and above Microsoft SQL Server 2008 Standard Edition Service Pack 4 and above
ON THE DESKTOP	Microsoft Windows 7 and above
WEB BROWSERS	Microsoft Internet Explorer version 11 Microsoft Edge version 40 and above Google Chrome version 60.0 and above (the oldest supported version changes frequently) Mozilla Firefox version 55.0.3 and above (the oldest supported version changes frequently)

That is not to say that our modules won't work with older, unsupported versions. It's very likely that there would be no problem. But, as we enhance our modules with new features it is possible that we might introduce functionality that works fine in the supported versions of the above components but not in the older ones. In the same vein, you might find a software defect using one of our modules with an unsupported component. If we can replicate the problem using the supported component, then of course we will fix it. If we can't, then we'll ask you to upgrade to the supported component and see if you can reproduce the problem. If you can, then again it's our responsibility to fix it.

If you have any questions on versions and support, please feel free to contact me at jerryr@infohr.com.

New info:HR enhancements

by Jerry Rowland, Chief Technology Officer

Over the last few months our development team has put in many specialized enhancements around the calculation of vacation or other paid time-off based on certain conditions. Below gives you a 'Reader's Digest' overview of those enhancements.

Daily Vacation Entitlement

info:HR can now calculate an employee's vacation entitlement daily. This gives the employee the ability to know how much time they've earned to-date and how much time they will accumulate by any given date within the Vacation period.

There are specific rules to be followed, especially if starting this calculation change mid-vacation year. Once you identify that vacation will be calculated daily, the Daily Vacation Accrual Master needs to be completed. This master sets up the criteria used by the feature.

- Sample of daily accrual logic: (1 day * annually earned accrual hours per year) /365 or 366 (if it is a leap year). The result is rounded to 4 decimals. For example, if an employee falls under the Service Range category of 120 to 999 the formula would be:

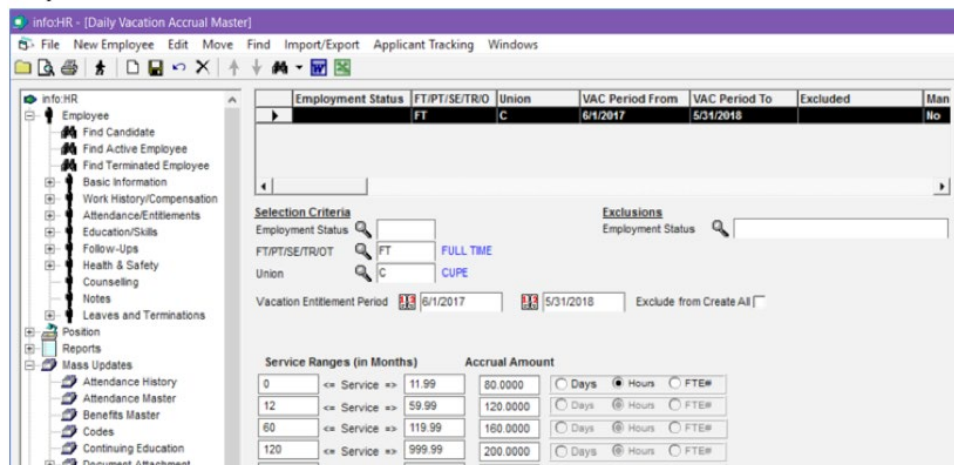
$$(1 * 200) /365 = .5479 \text{ hours accrued daily}$$

- If during the Vacation Period an employee moves from one Service Range to another, the daily accrual logic will calculate the accrual up to the end of the first Service Range and then calculate the remaining Vacation Period using the new Accrual Amount.

Nightly, a program runs on the server that will automatically add a day's accrual to all applicable employees. Should for any reason the program not run overnight, it will run automatically when the first person who has security access logs into info:HR. The Accrual Report shows the day-by-day update of an employee's vacation accrual.

This enhancement is available to all clients as part of your annual maintenance fee. If you wish to learn more about how this functionality works, please contact me at jerryr@infohr.com.

Daily Vacation Accrual Master



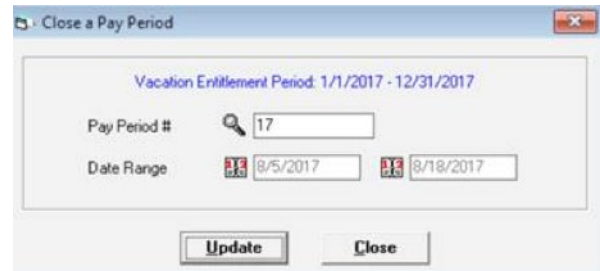
Paid Time-Off Based on Hours Worked

This option provides the ability to calculate paid time-off accruals based on the number of hours worked within either the previous or current pay period. The accruals are stored in info:HR's Hourly Entitlement Master.

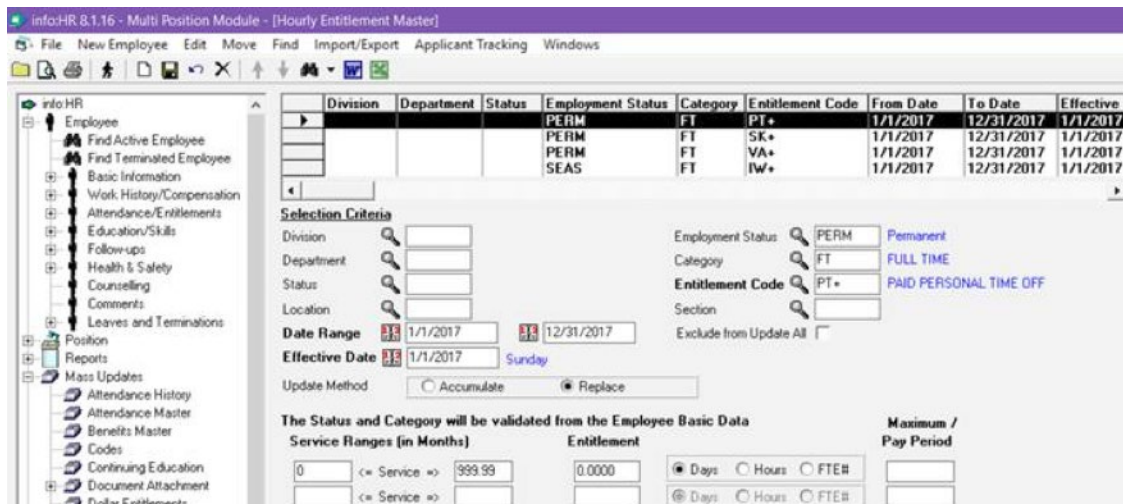
Steps to implement this function are:

1. Identify which Attendance Reason Codes will be used. Each paid time-off can have its own set of Attendance Reason Codes that qualify for inclusion in the calculation.
2. Using the Vacation Pay Percentage Master, create and apply the rules for the vacation percentage that will be used by the program.
3. Using the Hourly Entitlement Master, create all the paid time-off rules. The maximum number of hours that can be accrued within a pay period can be identified for each Service Range. The paid time-offs are set up with a zero-paid time off that is applied at the beginning of the year. Each pay period then adds to the current year accrual.
4. Set up the Pay Period Master.

When a Pay Period is closed the program calculates the Hourly Entitlement Accruals based on the 'worked' hours within the pay period and adds the accrual to the existing current year column.



This enhancement is made available to all clients. A configuration fee may apply based on your organizational requirements. If you wish to learn more about how this functionality works, please contact me at jerryr@infohr.com.



These are the rules set up to indicate paid time-off based on hours worked. The codes use the "Flex" logic - positive codes (with a "+") add to the entitlement and negative codes (with a "-") subtract from the entitlement. There may be multiple negative codes subtracting from one positive code.

Welcome to our new clients

Highview Residences



Highview Residences

Hamilton-Wentworth Catholic Child Care Centres



HAMILTON-WENTWORTH
Catholic Child Care Centres

If you are attending either of these events this fall, please stop by our booth and say hello.



AFOA Canada International Conference
October 2-5 in Vancouver, BC

The Law Office Management Association
Conference & Trade Show
October 26 in Huntsville, ON

Webinar schedule 2017-18

WEBINARS 2017	DATE
Features of info:HR 8.1 and ESS 5.1	September 12
Security Templates	September 19
Flags, Follow Ups, Comments & Counselling	October 17
Continuing Education and Training Plans	November 14
Reporting	December 12
WEBINARS 2018	DATE
Year End Process	January 9
New Features of info:HR 8.x and ESS 5.x	January 16
Mass Updates	February 13
Reporting	March 20
Year End Process	April 10
Security Templates	May 15
Email Sending Functions	June 12

NOTE: 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.

See you at the next webinar!



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