info

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

As I am writing this (in Toronto) the snowflakes are falling and I had to shovel snow today! I hope we get the white stuff on Christmas Day! And some for our west coast friends! I'm not sure you would all agree with me. I am happy to be shovelling as long as I catch my flight to Jamaica for a New Year's Eve vacation. It's been an extremely busy year for us at HRSS and I'm looking forward to the break before things ramp up in 2018.

The team at HRSS just met for our annual company meeting to review 2017 and make plans for the future. 2017 was successful from many aspects and for that we thank you for your support. We were very pleased to welcome many new clients to the info:HR User Community. We had not-for-profits, health care organizations, First Nations groups, child-care facilities, and many others join our client base. And our existing clients continue to be our rock - we value you so much. We work hard to support you by responding to your inquiries as quickly as we can, visiting with you to understand your business and how we can be better, and providing you with new product releases that include the enhancements you asked us for. One milestone we are particularly proud of is that our first client we signed back in 1991 is still with us. That's 26 years ago! The Number One song on the Billboard charts that year was "Black or White" by Michael Jackson. "Dances with Wolves" won best picture. The Toronto Maple Leafs finished in last place…no surprise! It was a long time ago.

A final and special thank you to those of you that have referred us to other organizations or acted as a reference to prospective clients when we asked you. It means a lot to us.

Happy Holidays to all of you and we wish you a safe holiday season with your loved ones.

Andy Staniewski

IN THIS ISSUE

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

Highview Residences relies on info:HR Training Plans to keep training on track

by Barbara Chicago, Client Service Representative

Highview Residences and Inspirit Residences, located in London and Kitchener, Ontario, provide care and support for elderly clients in a home-style setting. Care levels vary from minimal support to dementia care. The main goal is to promote independent living in a safe and caring manner. A newer client to HR Systems Strategies with 110 employees, Highview purchased info:HR in May of 2017 with the sole purpose of tracking and recording required training for their employees. Jean Grasby, CFO, had used the system at a previous organization and when the need arose for a system to track employee data she called on HR Systems Strategies, remembering the functionality of the system.

The implementation of the system was assigned to Suzanne Sharp, Administrative Assistant to the CEO and CFO. Suzanne had not been part of the purchase process so she had never seen info:HR prior to her first training.

During the initial training session it was clear to Suzanne the system was capable of so much more than just recording employee training records. The four main screens were addressed; the Initial Data Load had provided all of the employee information required for a solid start to the implementation. The focus then became the Position Master and building Training Plans.

Continued on next page

"The system is amazing. It is so easy to set people up, getting the standard data in and then adding the training is so simple," Suzanne remarked.

The tracking of training being the focus for Highview, Suzanne found the Training Plans quite helpful. Training Plans are a standard feature in info:HR. They provide the ability to generate Follow-Ups for required training automatically for all employees based on required/legislated courses by position, with the ability to supplement and individual's training plan by manually adding courses. The ability to set up a list of courses and assign required courses to a position allows Suzanne to simply enter training records as they are taken by each employee. Reminders are sent when new training is due. Suzanne can confidently at any time assess the training status of any employee and follow up if necessary.

"With all of the new regulations in our industry, info:HR will be vital," said Suzanne. "We can run reports very quickly to ensure we are compliant with Retirement Home Regulatory Authority and Ontario Retirement Communities Association requirements."

Suzanne is managing employees in two organizations, and will have on-boarded a third organization by the end of 2017. All organizations can be reported on separately in info:HR and Suzanne believes this feature will make reporting to the appropriate stakeholders quite simple.

"Every time I log in I see new things to use," Suzanne said. "We are using the Performance Screen and Employee Flags to manage so many things for us now; we are looking at other areas of the system and have begun using the Leave process."

At this time training is the strong focus; however, Suzanne has been exploring the system and is finding new features.

"Every time I log in I see new things to use," Suzanne said. "We are using the Performance Screen and Employee Flags to manage so many things for us now; we are looking at other areas of the system and have begun using the Leave process."

When asked what she thought was the most valuable feature for her organization Suzanne replied, "The reporting is so helpful. I can run reports on new hires and terminations on a monthly basis, and of course our continuing education reporting, knowing who requires what training and when they will need it."

Suzanne is looking forward to continuing to expand her use of info:HR with the new organization coming on board - she believes info:HR will be even more valuable to her as the organization grows.

Get Ready for Ontario Bill 148

Ontario's new Bill 148 introduces several ESA changes that require modifications to info:HR, specifically in the areas of public holiday pay and personal emergency leave. We will have the program changes made shortly and will notify all clients when the changes can be downloaded from the client portion of our website, along with instructions on how to use them.

Tips and techniques: Odds and ends for year-end

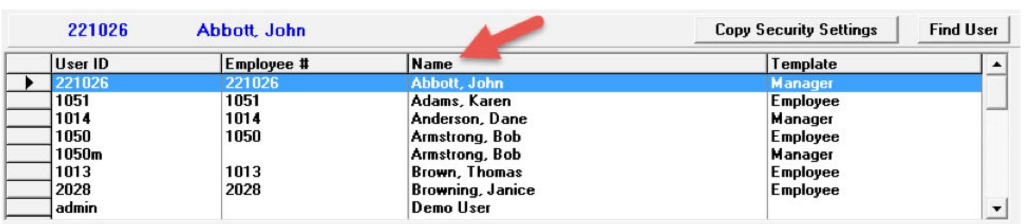
by Hemu Mistry, Manager, Application Development

Season's Greetings Everyone!

In this edition of the newsletter I want to bring to your attention some of the simple features and common messages you see in info:HR and ESS.

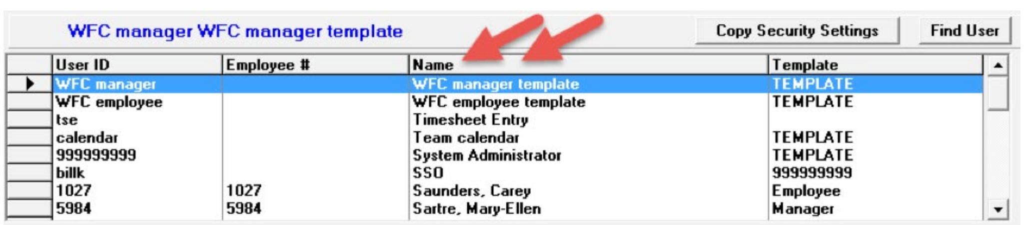
1. Viewing lists

One of the features of displaying lists in info:HR is the ability to sort the rows in the grid/table you see on almost all the screens. Click on the column heading and all the rows will be re-sorted by that column in ascending order. If you want the list to be sorted in descending order, then click again on the column heading. Simple, right? Click once on the column heading to display the list sorted in ascending order, click twice for descending order.



221026 Abbott, John — Copy Security Settings — Find User

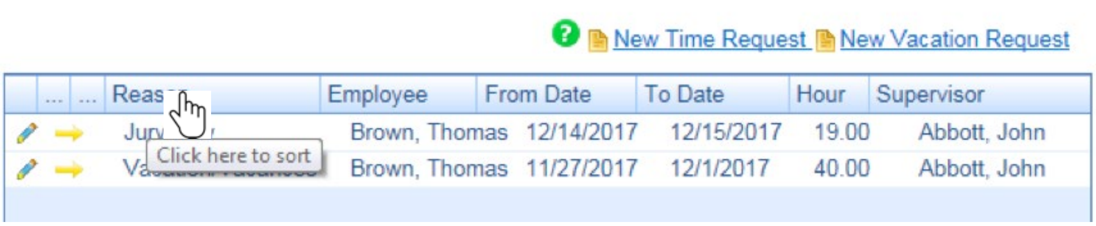
User ID	Employee #	Name	Template
221026	221026	Abbott, John	Manager
1051	1051	Adams, Karen	Employee
1014	1014	Anderson, Dane	Manager
1050	1050	Armstrong, Bob	Employee
1050m		Armstrong, Bob	Manager
1013	1013	Brown, Thomas	Employee
2028	2028	Browning, Janice	Employee
admin		Demo User	



WFC manager WFC manager template — Copy Security Settings — Find User

User ID	Employee #	Name	Template
WFC manager		WFC manager template	TEMPLATE
WFC employee		WFC employee template	TEMPLATE
tse		Timesheet Entry	
calendar		Team calendar	TEMPLATE
999999999		System Administrator	TEMPLATE
billk		SSO	999999999
1027	1027	Saunders, Carey	Employee
5984	5984	Sartre, Mary-Ellen	Manager

The same is achieved in ESS as well though not all columns allow sorting. If you move your mouse over a column and the mouse pointer changes to finger pointer then you can sort the rows by that column.



...	...	Reason	Employee	From Date	To Date	Hour	Supervisor
		Jury	Brown, Thomas	12/14/2017	12/15/2017	19.00	Abbott, John
		Va	Brown, Thomas	11/27/2017	12/1/2017	40.00	Abbott, John

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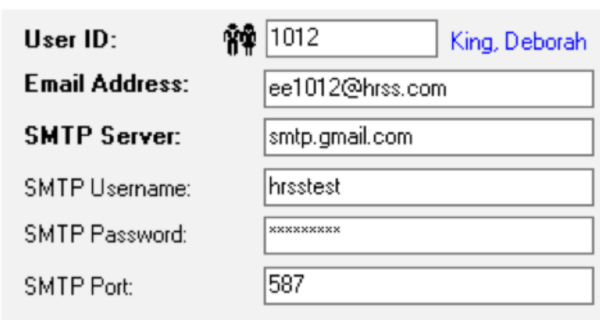
2. Email addresses in ESS

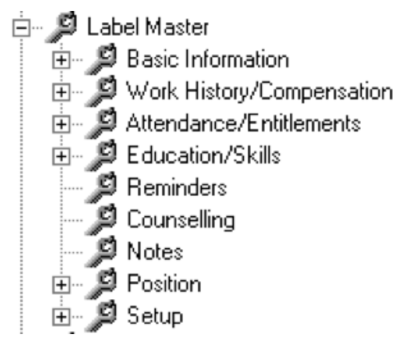
In ESS if you ever see a warning message such as "Employee Email is not set up. Please contact HR Department" or "Logged In User does not have a valid email set up in the system", this simply means the employee you are working on or the logged-in user does not have an email address set up in info:HR. Every ESS user must have their User ID set up with email information on the Email Setup screen. This screen is located in info:HR under the **Setup menu \ Security \ Email Setup.**

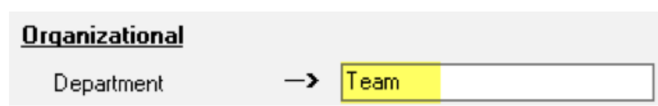


Be careful that you do not create duplicate entries for either the User ID or the email address. That's easy to check by using the list sorting feature described above.

3. Label Master

Another simple feature we have is the ability to change the labels in info:HR for many of the fields you see on the screens. The label changes appear in ESS as well. Take a look at the various screens under the **Setup** menu in info:HR \ **Label Master**. Depending on what screen you want to change the label on, go to that respective screen under the **Label Master** menu. This will give you the list of all labels that can be changed along with their original name. Enter the new name and save the changes. Go to the respective screen or report that displays that field label you changed and you will see the new label. We have been adding more fields to the Label Master screen as time goes by, so you'll have control over a greater number of fields.





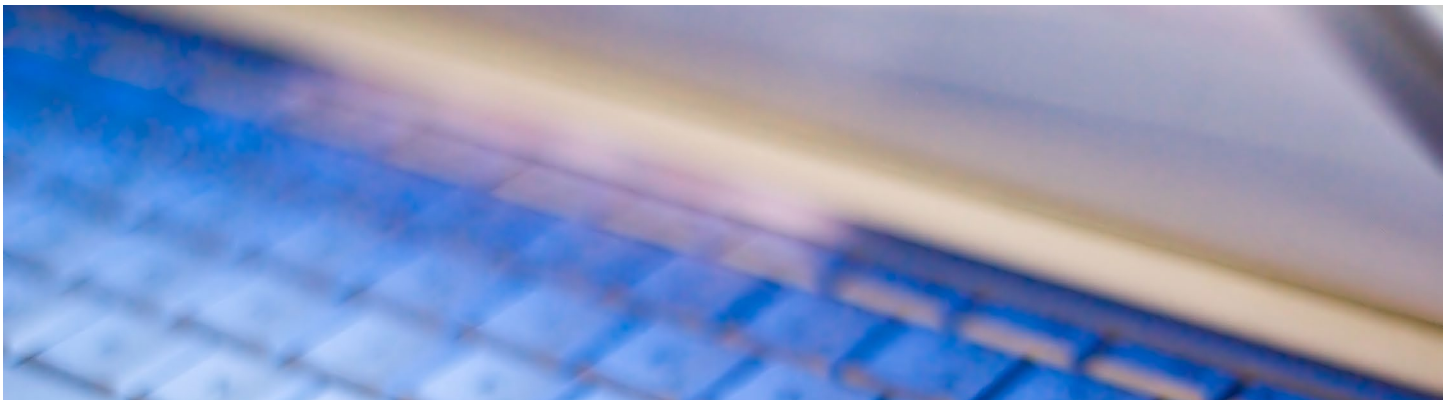
If you have any questions or comments or need any assistance with these features or any other functionality in info:HR or ESS or Timesheets, please do not hesitate to call our support line at 1-800-567-4254 or email us at support@ infohr.com .

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!

2018 New release highlights

by Jerry Rowland, Chief Technology Officer



During the first quarter of 2018 you'll be notified that there are new versions of several of our modules available. Here are the highlights…

info:HR Version 8.2

Enhancements include:

- New Applicant Tracking component
  - Enhanced **Position Requisition** screen to match the new functionality in the ESS module.
  - Setup screens to define the requisition approval workflow procedure.
  - Ability to create user-defined emails to the applicant based on Position Type.
  - Ability to show, hide or rename tabs on the web application form.
- On the **Enter a Leave, LOA Date Change** and **Re-activate from a Leave** screens the Comments box will appear for all transactions. This way you can append comments as needed. On the **Re-Activate from a Leave** transaction, the system will copy the highlighted data from the Comments box to the **Employee/Comments** screen using a Comment Type called: LOA History, with a date set to the leave return date.
- Additional security
  - User login will offer the option to require Two-Factor Authentication.
  - The **Setup/Security Master** screen will be added as a selection option to the New Hire Procedure, giving you the ability to set up a new employee's login credentials for the ESS and/or Timesheets modules at the time of new hire.
- Mass Updating
  - The attendance mass add/update function will provide an option to use employee hours per day instead of a fixed number of hours.
  - There will be a Maximum column on the Mass Update for Hourly Entitlements, similar to that for vacation and sick time.
- Reporting
  - There will be a new Headcount report based on a given date range. This will be useful to answer the question, "How many employees were there on a given date?" since it will include employees that are currently terminated but that were active at the time.
  - Several new reports, to be defined by January 2018.

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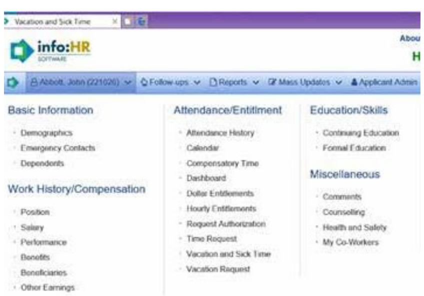
Employee Self-Serve Version 5.3:

- We will be delivering a complete "look and feel" change.
- There will be a re-design of the menu structure items. All pages relating to the selected employee are on the top of the page and not on the left margin as is the case now.
- New controls will be added to look up table entries and calendars.
- We will add online Applicant Requisition workflow to allow front-end managers to request an employment requisition to fill vacancies or to hire new employees. The requisitions go through a user-defined workflow process prior to being posted to an external or internal job site.

Example of new menu structure:



Online Web Application Form:

- We will add an option to require Two-Factor Authentication as additional security for applicants applying for a position.
- The applicant will have the ability to view positions previously applied for and the status of the application.
- The web application form will display using the info:HR setup rules regarding which tabs to display and how they are to be labelled.
- Customizable email responses can be sent to the applicant.
- Note - the new web application form can only be used with ESS Version 5.3 and above.

Timesheets Version 5.3:

- We will provide some basic screen cleanup, but no major "look and feel" changes are made within this release.

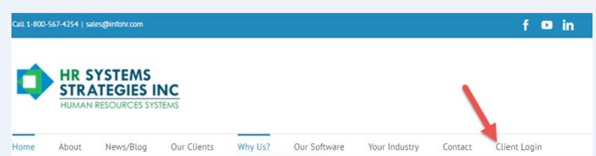
Scheduling Year-End Rollovers

by Barbara Chicago, Client Service Representative

It's the time of year when many of you are preparing for a new year of entitlements – vacation, sick time, and the like.

Those of you who have been using info:HR for more than a year are (somewhat) familiar with the process that needs to take place within the system to instruct it to reset the various entitlement banks for a new year's accruals. For clients who are new this year, this will be a first-time activity for you.

The good news: the process is straightforward and we have it fully documented in our year-end rollover procedure manual, which you can find on the client portion of our web site.



You'll need your serial number and password to log in. If you don't have them, please email us at support@infohr.com and we'll send them to you (sorry, no phone calls for that information).

Since this is a task you usually do only once a year, we understand if you'd like a bit of assistance. Email me at barbarac@infohr.com and we'll book a one-hour slot at a convenient time when I can help you with your rollover. We shouldn't need that much time, but that way we won't have to rush through it.

Once done, your info:HR system will be ready to accrue next year's entitlement balances for all your employees.

Welcome to our new clients

Comox Valley Regional District

Westcoast Child Care Resource Centre

Sarnia-Lambton Children's Aid Society

Whitefish River First Nation

Webinar schedule 2018

WEBINARS 2018	DATE
Year End Process	January 9
New Features: 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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