HR Systems Strategies Inc.
and info:HR software
**Client Newsletter**
**Spring 2018**

# Yeah!! Spring is finally here

... and for us at HR Systems Strategies Inc. we love to reach out to our clients with our Spring Newsletter. We hope you enjoy the read.

There is so much in the news today. One issue that has caught my attention is the plethora of news items pertaining to Artificial Intelligence (AI). Being in the Human Resources industry these articles certainly have got me thinking. OK, I am a self-confessed sci-fi geek. In my earlier years I would curl up in my bedroom with the latest Isaac Asimov novel. And I have probably seen *2001: A Space Odyssey* at least 10 times. That doesn't mean that I am a fan of everything moving our world forward from a technology perspective. Yes, there are lots of positives. Especially the breakthroughs in the healthcare industry. And how would I live without my iPhone today? But how will life be 10, 20, and 50 years from now? For certain they are going to get self-driven cars right. And you will be served by a robot at your McDonald's drive-through. And you may not even know it's a robot, because it will look human. OK, so maybe I'm getting ahead of myself. But, as leaders and practitioners in the people and HR Industry, these are issues we are all thinking about and how they affect us personally and professionally. For me, I accept and welcome the on-going and new innovations in technology. But I still want my morning coffee order to be served by my favorite barista.

Thanks as always for your continued support!

Andy Staniewski

IN THIS ISSUE

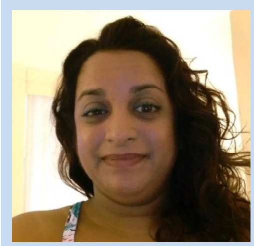

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

# Marvin Windows and Doors Canada moves to info:HR cloud-hosted solution


Since its founding in 1986, Marvin Windows and Doors Canada (Marvin) has grown to include 20 showrooms across the country, with locations from Newfoundland to Vancouver Island. As the premier manufacturer of made-to-order wood and clad wood windows and doors, Marvin focuses on design flexibility, innovative products, and individualized customer service.

When Human Resources Manager Masha Ali started with Marvin in 2015, the human resources team at the Mississauga head office supported a cross-Canada Marvin family of 70+ busy sales and service people with a combination of spreadsheets and paper-based payroll reports. It wasn't long before Masha started looking for an HR system that would deliver the same flexibility and individualized service the Marvin team provides to their customers.

"One of the first questions I asked when I started was 'Can I get access to the HR system?' and the answer was 'Here's the spreadsheet,'" said Masha. "Everything came from one computer and the payroll system is not cloud-based. Half of our workforce is in sales, so it's important that we understand everyone's pay structure and draw."



*Human Resources Manager Masha Ali*

Restricting her search to Canadian companies offering cloud-based storage and proven functionality eventually led Masha to HR Systems Strategies Inc. and infohr.com, where she signed up for info, the customer newsletter.

"I found a lot of the systems looked more bubbly than they were functional, and they were all built for the U.S.," said Masha. "When I found info:HR online and saw what it included, I asked for a demo… and my mind was made up."

Before implementation planning could begin, Masha worked to overcome a stumbling block familiar to many HR Managers: convincing upper management to invest in a human resources information system (HRIS).

Masha secured executive go-ahead by explaining basic HRIS functionality and outlining how an HRIS could increase efficiency, offer employees access to their own files, and contribute to overall growth – while aligning with a company-wide initiative to reduce paper.

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Knowing that her product of choice – info:HR -- offered proven functionality made it easier to request approval for the investment in new software.

"info:HR has everything that would not only cover our record keeping and data needs, but it has the self-serve features like reminders for anniversaries, tasks, and performance reviews that are so important," said Masha. "All the functionality was huge for me."

In addition to implementing info:HR ESS, Masha opted to take advantage of info:HR subscription hosting. Having data centrally located in the cloud makes it easy for employees to access information from multiple locations across the country.

"We basically have no IT," said Masha. "We don't have servers, so having full access to a system hosted offsite where we don't have to worry about security and backups was a huge deal for me. And knowing that there are people who are quick to respond if I need help through the transition and implementation."

Implementation of the Employee Self-Serve (ESS) started late in 2016, and proceeded quickly through the first round of data entry and audits. Masha outsourced recruiting in order to spend more time in the system and plan for a successful roll-out of the first phase for employees in Ontario, where the bulk of the Marvin workforce is located.

"It's easy to learn," said Masha. "After I got it through my head that there are two things I need to do to log into the approval screen on the ESS, it's just clicking the button. Once you are in the system it's pretty standard."

Masha credits info:HR support for helping her through the initial implementation: "I would rate them highly. Everything was super quick in terms of implementation, setting up the system, and training."

"...having full access to a system hosted offsite where we don't have to worry about security and backups was a huge deal for me. And knowing that there are people who are quick to respond if I need help through the transition and implementation."

With a Canada-wide rollout still to come, Masha has already noted a significant reduction in paper and filing, and a general increase in employee satisfaction: "People seem genuinely happy that we have an HR system where they can view their own information. Our service technicians can sometimes end up on long road trips where they accumulate overtime, and they had nothing to record it in. Now with the mobile ESS they can do it on their phone or on their iPads and they know their information is going somewhere."

Sales staff are scheduled for quick hands-on training on how to complete vacation and absence requests in the Employee Self-Serve.

"The training takes five minutes for employees - it's so quick," said Masha. "I think they are going to like it. No more forms, and they will have their vacation and training information at hand instead of having to ask us. That's the biggest thing for them."

For Masha Ali, info:HR has delivered worry-free cloud storage, happy employees, and accessible support, opening the door to a better HR experience at Marvin. "I like the one-on-one, and it's nice not to have to put in a ticket for a request and wait hours for a response. If I have a problem I can jump on the phone and someone will help me work through it. Overall I have been very happy with the experience."

# Tips and techniques: Document attachments

***by Hemu Mistry, Manager, Application Development***

Hello everyone!! I hope 2018 has been off to a great start for you all.

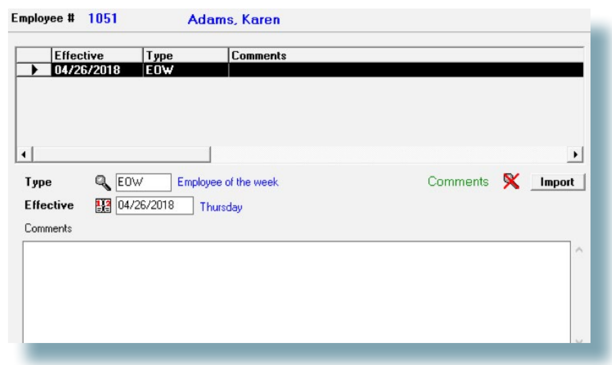
In this edition I want to bring to your attention the document attachment functionality in info:HR and in ESS. I know many of you must have already been using this function but for those who have not had chance to try this out, I'm sure you will find this a handy feature to have.

You must have seen this icon Import on various employee screens in info:HR. This is the Document Attachment icon, used for uploading employee documents on that respective screen. You can attach Word documents, Excel spreadsheets, PowerPoint files, Publisher files and even PDF files – basically, anything that is in an electronic format. Almost all the screens under the Employee menu have this option of attaching documents to the employee's records. If a screen holds multiple records of the employee, e.g. Employee Comments screen, each of these records can have its own document attached. Once the document is attached you can view the contents of that document from info:HR, provided you have security access to view them.

If you do not see the document attachment icons on the screens then it means the document attachment functionality has not been turned ON or that screen does not have the option to attach a document. To turn ON the functionality, go to **Setup menu \ Company Preference \ General**, check the Attachment checkbox and save the changes. Log off info:HR and log back in.

Below is how you can attach documents and view them. I am using the employee's Comments screen as an example but it's the same procedure for all the other screens that have the document attachment option.

In this example this employee does not have a document attached to her "Employee of the Week" Comment record.




Wherever you see the icon on the screen, it means you have not attached any document to that record yet and so you have option to upload one on that screen for that respective employee's record. To attach a document, click on the Import button (if missing, then click on the new record icon on the toolbar first). This will pop up an **"Import Attachment"** screen. Use the ... button to locate the document you wish to attach. Specify the **Document Type**, which is mandatory.

- Remember info:HR provides security access on each of the **Document Type Codes**, which means you can control who can view which type of the document based on the document type code linked to the document. You can do this using our security function located under the **Setup menu \ Security \ Security Master** screen. Highlight the user you wish to assign the security rights to, then click on the **More Security** menu option (located at the top left corner of the screen) and select the **Document Type** menu item. On this screen for each document type code, you can give user rights to Maintain the document (attach or remove) and/or Inquire (view the contents of) the document.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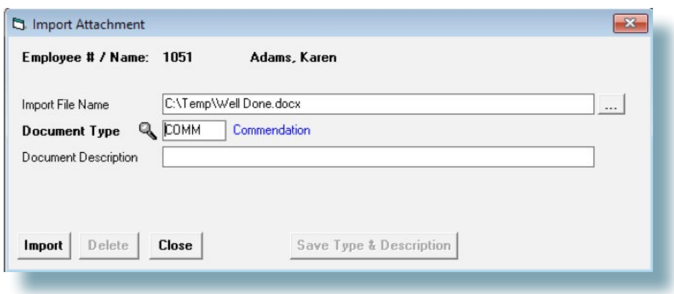
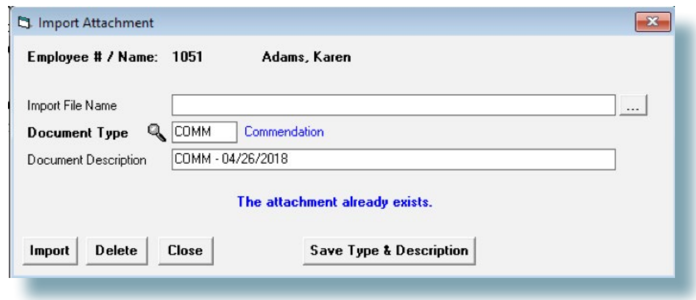
- If you see a red "X" over the magnifying glass on the Document Type field that means the user does not have access to "Document Type" code lookup function. Use the **Setup menu \ Security \ Security Master** screen, highlight the user who does not have security rights, click on **More Security** menu option \ select **Codes**. On this screen locate the **"Document Type Codes"** from the list and give user access to Maintain and/or Inquire rights. Have the user log off info:HR and log back in for the security change to take effect.

You also have the option to specify the **Document Description.** This is free-form text. Finally, click on the Import button to attach the document and **Yes** at the prompt. Once you have attached the document, save the change on the employee's screen.




The document attachment icon on that employee's record will change to Import . You can now view the contents of the document by clicking on the icon.


- If you want to change the Document Type code associated to the document attached or change the Document Description, click on the Import button, make the necessary changes and click on the **Save Type & Description** button and then **Close**.
- If you want to remove the existing attached document and/or attach another document, then click on the Import button, and then click on **Dele**te button to remove the document. To attach another document, click on the ... button.




All the documents attached in info:HR are stored entirely in info:HR's document database, with no link back to the original location of the document. Therefore, if the document is moved or deleted from its original location, info:HR will continue to have a copy this document on file and it will exist in the document database until it's deleted from info:HR directly.

## Document Type Report

You can use the Document Type Report under the Reports menu in info:HR to help you list the employees who have particular type of documents attached. It also has an option to list the attached documents by its Document Type code. Please try this report out as it has lots of options on it based on what type of list you are looking for.

If you have any questions or comments or need any assistance with this feature or any other functionality in info:HR or ESS or Timesheets, please 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. Once again, see you all in our next issue!

# Next and future releases

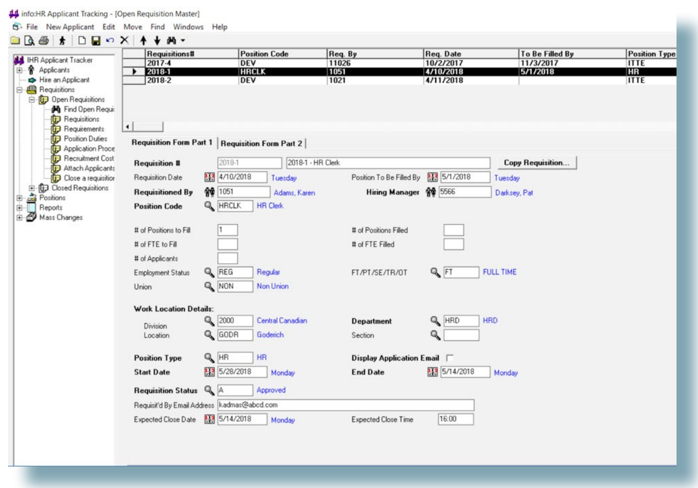
*by Jerry Rowland, Chief Technology Officer*

As mentioned in our last newsletter, in April we released a new HR admin module patch upgrade (version 8.2). This release is available on the client portion of our website for downloading. Currently, it only contains program changes to accommodate Ontario's Bill 148.

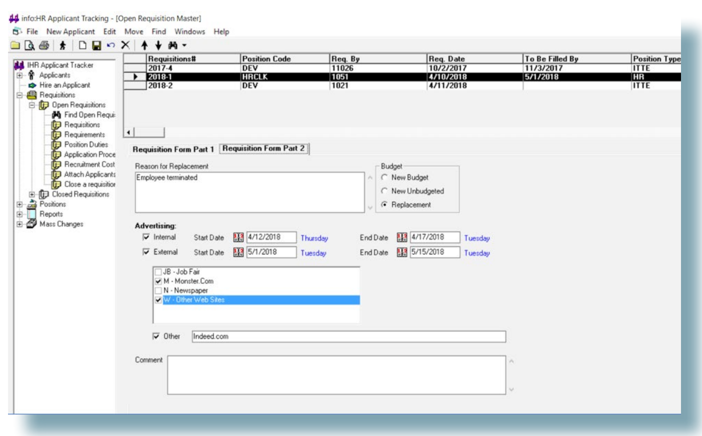
Beginning in June and throughout 2018, we will be modifying this version to include:

- Redefine Applicant Tracking requisitions and reports.
- Define work flow needs for position change. Make sure all effective dates are the same, i.e. Department, Division, Position Start and/or Salary Effective Date.
- Dollar entitlements mass update: allow an option to use the FTE#.
- Headcount reports based a specific time period.
- Append comments to the leave of absence date change and reactivation screens. Also, provide the ability to print the comments even when an employee is not on a leave.
- Additional health and safety reports.
- Security: Two factor login authentication can be used if desired.
- More efficient table and employee lookups, ability to navigate quickly through the tables.
- Additional document attachments on various screens.
- Continuing education and training data entry flow improvements.
- Adding additional sorting capacity to the Employee/Comments report.

## New Applicant Requisition Form – Page 1:



## New Applicant Requisition Form – Page 2:



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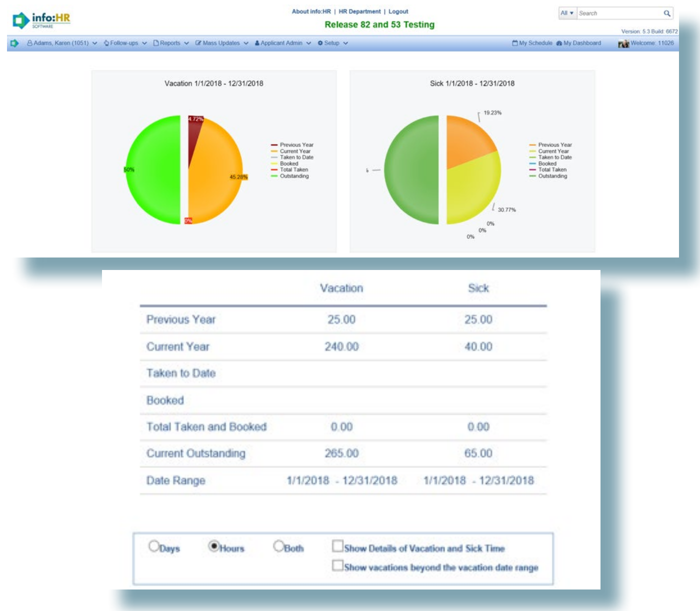
By late June improvements to ESS and Timesheets will include:

- Major change to the ESS look & Feel. See the example below.
- For clients who own the applicant tracking module, there is an ability to add a new requisition and have this requisition go through a workflow request/approval process defined by the type of position that is required.
- More filters on the ESS Calendar.
- On the Timesheet Approval page, the Comment box located on the top of the page will wrap the text within the box, reducing the need to scroll through the box to read the comments.
- Security: Two factor login authentication can be used if desired.

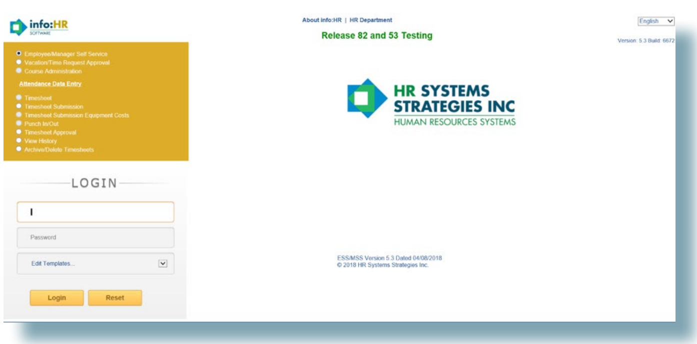
## Vacation & Sick Overview:



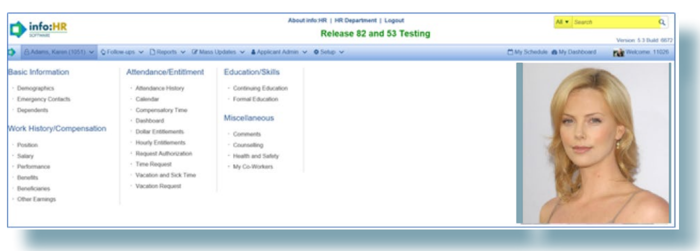

| | Vacation | Sick |
|---|---|---|
| Previous Year | 25.00 | 25.00 |
| Current Year | 240.00 | 40.00 |
| Taken to Date | | |
| Booked | | |
| Total Taken and Booked | 0.00 | 0.00 |
| Current Outstanding | 265.00 | 65.00 |
| Date Range | 1/1/2018 - 12/31/2018 | 1/1/2018 - 12/31/2018 |



## New Login Page:




## New Employee Maintenance Structure:




- New method to search for employees (highlighted area).
- New menu structure for all employee-only based screens.

# Ontario Bill 148 – Changes to info:HR

*by Barbara Chicago, Client Services Representative*

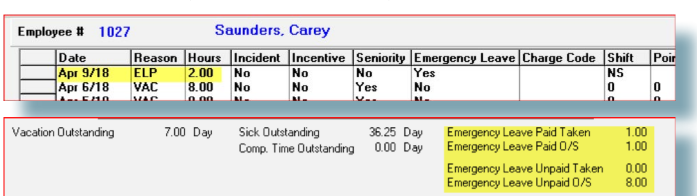
As we all know, Ontario's Bill 148 was launched in January 2018. This Bill outlines a number of changes for Ontario employers, with two that specifically affect info:HR. Modifications have been added to track Paid/Unpaid Emergency Leave and to produce a Statutory Holiday record in accordance with the new calculation specified in the Bill. These enhancements are now available as part of version 8.2, the current version available for download from the client portion of our website.

## Emergency Leave

Bill 148 provides for 2 paid and 8 unpaid emergency leave days. If you plan on tracking these leaves by the hour, e.g. for an 8-hour day the leaves would provide 16 and 64 hours respectively, then you can use info:HR hourly entitlements to do that; no special set-up is required. If you are unsure of how to create the hourly entitlements, contact us at 416-599-4747 or 1-800-567-4254. We're happy to help.

Bill 148, in combination with the ESA Act of 2000, also allows you to track emergency leave by occurrence, meaning that a part-day absence can be counted as a full-day absence. If you plan on applying this interpretation to your Emergency Leave policy, then there is some special set-up in info:HR that you must complete.

The emergency leave counter on the Attendance screen is then managed by occurrence and the attendance records provide the actual hours taken, allowing you to analyse the use of emergency leave if necessary.

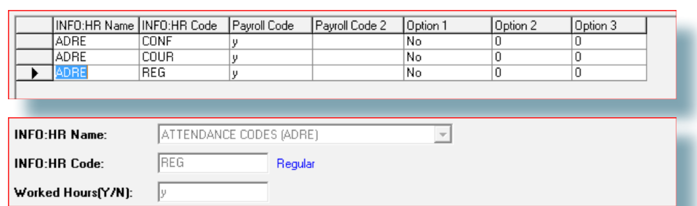



*There is a How To document available in the client section of our website to assist you in setting up the Emergency Leave.*

## Statutory Holiday

The Statutory Holiday calculation has changed as well. In order for the new calculation to operate you must have attendance records for hours worked in the system. You may receive the worked hours from our Timesheet module or an attendance import from a time and attendance system.

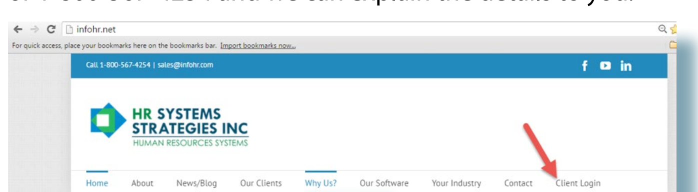
Tell info:HR which attendance codes accrue worked hours by going to **Import/Export** on the top menu bar, then go to **Setup** > **Code Matrix.** Add entries for each attendance code that counts toward accruing worked hours.




Back in info:HR you will also need to go to the **Setup** > **Pay Period** > **Pay Period Master** screen and set up the pay period master in line with organizational pay periods.

Next, go to **Mass Updates** > **Entitlements** > **Holiday Master** and complete the list of holidays for the year.

The last step, as each statutory holiday comes around, is to instruct info:HR to apply the calculation. There are certain timing considerations here, most notably that you must have gathered attendance records for the pay period prior to the holiday. Please contact our support line at 416-599-4747 or 1-800-567-4254 and we can explain the details to you.




*There is a How To document available in the client section of our website to assist you in setting up and applying the statutory holiday calculation.*

# Welcome to our new clients

Paskwayak Business Development Corporation

Harrow Health Centre

George Hull Centre for Children & Families

Dnaagdawenmag Binnoojiiyag Child & Family Services

# Webinars!

| WEBINARS 2018 | DATE* |
|---|---|
| Features of info:HR 8.x and ESS 5.x | September |
| Timesheets Templates & Simple Timesheets | October |
| Flags, Follow Ups, Comments and Counseling | November |
| Reporting | December |

**Exact dates will be published in the next newsletter.*

**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!

info:HR
SOFTWARE

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