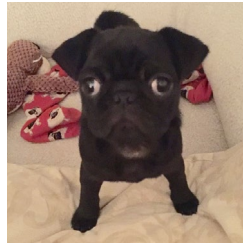


It's a new year..

...and all of us at HR Systems Strategies Inc. wish you a very Happy New Year and all the best for 2019! My excitement over the holidays was getting a new addition to the HR Systems Strategies Family. Her name is Raffi, and she is an 8-week-old black pug weighing in at 3 lbs. She was the star attraction and we had so many visitors wanting their turn to hold her. There have been some sleepless nights training her, but it is very much worth it. As well I spent a weekend in Old Quebec City. What a wonderful city in which to get into the holiday spirit! All of the shops and restaurants were beautifully decorated. Skaters were out in full force on the outdoor rink. Santa was nestled in his outdoor chalet with his elves taking meticulous notes of all the wishes from the little boys and girls. It was magical. It was a fun weekend with lots of laughter.



Raffi, the newest member of the HR Systems Strategies family.

One of the laughs I had was seeing someone wearing a t-shirt with the words "I don't need Google, my wife knows everything!" - another reminder of how the Internet and social media have changed the world and our day-to-day lives. My children hate when I recite stories about how it was like when I was a youngster, i.e. walking to school in snowstorms up-hill both ways, not knowing what a computer was until first year university, etc.

But it is astounding how fast the Internet and social media have taken the world by storm and dominated how we receive information. I mean, the President of the United States uses Twitter to communicate with the rest of the world! How crazy is that!?

I'm not big on New Year's Resolutions, but this year I plan to limit my time on social media and instead make time for an outdoor walk with Raffi or a run to work off the holiday pounds. I hope you enjoy our first newsletter of 2019; the team here at HRSS looks forward to supporting you through a successful 2019!

Andy Stanionaki

CONGRATULATIONS to Kerry-Ann Pletch (City of Guelph), the lucky winner of an Amazon gift card at the Ontario Municipal Human Resources Association Fall Conference.



IN THIS ISSUE Client Story: Comox/2-3
Tips and Techniques/4-6 Employee/Manager Self-Serve/7-8
Webinar Schedule 2019/8

Comox Valley Regional District turns to info:HR for their first-ever HRIS software implementation



The members of the Comox Valley Regional District, comprised of three municipalities and three electoral areas on Vancouver Island’s central east coast, work collaboratively to provide services for the benefit of the diverse urban and rural areas of the Comox Valley.



An efficient five-person team manages human resources, payroll, and safety for the 230 municipal employees who keep things running at Comox Valley Regional District. While this busy group was managing with a spreadsheet-based system of employee profiles and other information for four different work sites, Ellen Jackson, the municipality’s Senior HR Advisor, could see challenges ahead.

“Access to information was the main challenge,” said Ellen. “We really didn’t have a central repository for HR business partners to go in and look at employee profiles and information. Our HR support at other locations would have to rely on someone else to look up hard copy files and relay information, not to mention we would have to go to one spreadsheet for this piece of information and another spreadsheet for that piece of information. Pulling reports was literally impossible.”



*Comox Valley Regional District Senior HR Advisor
Ellen Jackson*

The group decided it was time to implement a human resources information system (HRIS). After a rigorous RFQ and RFP process—with multiple presentations to the vendor qualification committee—a joint decision was made to implement info:HR software from HR Systems Strategies Inc.

Factors that tipped the scales in favour of info:HR included the system's user-friendly reputation, relatively gentle learning curve, and its proven ability to link to iCity, the organization's existing payroll system.

"Experienced users of the iCity payroll module will find the integration with info:HR not complex to implement," said Jerry Rowland, Chief technology Officer, HR Systems Strategies Inc. "The integration for each client using the iCity payroll module is customized to fit their needs."

“

"We needed something plug-and-play that works in our organization now and into the future. It's the right fit for us."

”

The new system had to be relied upon to provide viable information to the organization and to the managers.

"Smooth implementation is always our goal," said Andy Staniewski, President, HR Systems Strategies Inc. "But when an organization has never had an HRIS before, integrating with the current system is crucial and the learning curve has to be taken into consideration. I am really pleased that the Comox Valley Regional District is entrusting their first HRIS implementation to info:HR software."

Scale and budget also came into play: "Being a smaller organization, implementing a huge HRIS platform just didn't make sense for us," said Ellen. "We needed something plug-and-play that works in our organization now and into the future. It's the right fit for us."



info:HR's modular, scalable construction means the Regional District can rely on the software to grow along with the team as they make plans to implement succession planning, further HR development, and workforce management.

While the integration process is ongoing, the feedback so far has been positive. After only a few training modules, the team is already noticing the ease with they can access information, customize reports, and turn on features like auto-notifications.

"Auto-notifications are a huge time-saver," said Ellen. "Reminders go out automatically to the managers and HR about new hires or the end of a probationary period, which is great. Implementing a brand new system with a small team can be exhausting, but the HR Systems Strategies team have had nothing but patience for us and they've been great with all of our requests, questions, and verifications."

Tips and techniques: Emailing with Microsoft Office 365

by Hemu Mistry, Manager, Application Development

Happy New Year, everyone! In this edition of the newsletter I want to talk about one of the most frequently-occurring support calls lately from our info:HR and ESS/Timesheet clients when they switch their email system to Microsoft Office 365.

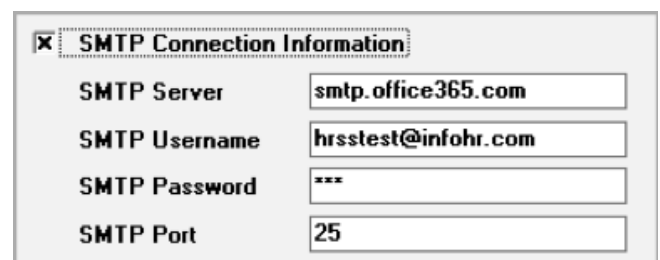
Yes, the info:HR and ESS/Timesheet emailing function works with Office 365 but there are couple of things your IT group will need to keep in mind when switching. The list below is from our basic understanding on how Office 365 works and also by working with our other clients who have already successfully switched to Office 365.

- Office 365 works with only two Ports, 25 and 587, so make sure they are not blocked by your network firewall or ISPs.
- Make sure the SPF record is updated with your domain or IP.
- Make sure your Server IP address has been updated to the Office 365 Tenants Allowed list and bypass any mail security.
- Make sure your IP is not blacklisted, otherwise you will need to have it removed from any Office 365 Blacklist. You can remove any blacklisting [here](#).
- For most of our clients the Anonymous email sending option does not work as it seems Office 365 does not allow that and so they have to use the 'one email account' option by providing an email address and password on our Email Setting set-up screens (see pics included here).
- Most importantly, keep in mind info:HR and the ESS/Timesheet modules do not control the actual email sending. We simply use the information provided on our Email Setting section to hand over the relevant information to your email server.

Both info:HR and ESS/Timesheet have their own Email Setting sections. info:HR's "SMTP Connection Information" under the **Company Preference** screen is used for sending email notifications out from info:HR only and the "Email Settings" in the ESS/Timesheet web module on the **Application Settings** page is used for sending emails out from ESS/Timesheet web modules only. Both these will need to be updated by your IT team when making the switch to Office 365.

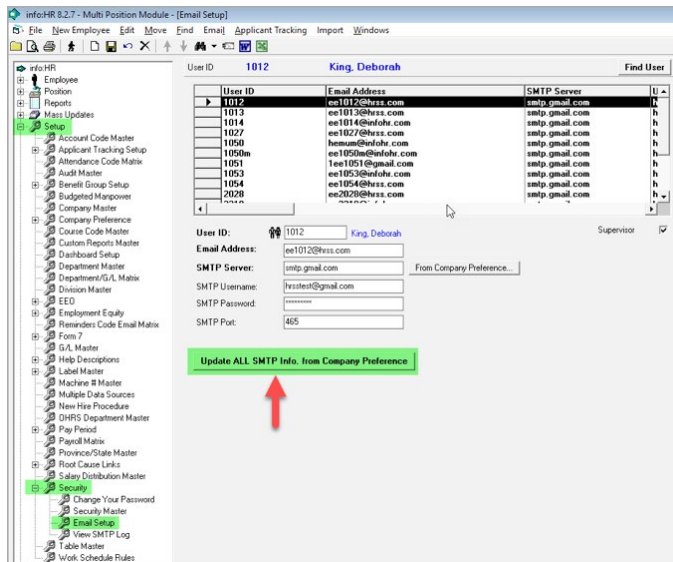
info:HR Email Setting

For info:HR to send out emails set under the **Setup menu \ Company Preference \ Email Notifications** screens, you need to set the "SMTP Connection Information" first on this **Company Preference \ General** screen. If Office 365 has been set up with an Authenticated access then you will need to specify the **SMTP Username** and **SMTP Password** as well. You can have your IT set this information up.



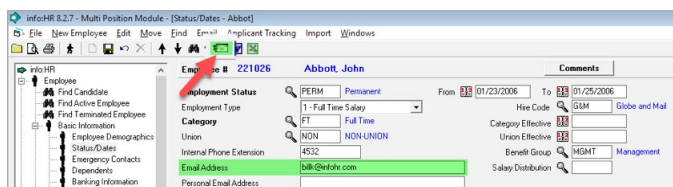
SMTP Connection Information	
SMTP Server	smtp.office365.com
SMTP Username	hrsstest@infohr.com
SMTP Password	***
SMTP Port	25

Thereafter, go to **Setup menu \ Security \ Email Setup** screen and click on the **“Update ALL SMTP Info. from Company Preference”** button. This will update the SMTP information for all the users’ emails entered on this screen.



To test if this email setting works:

- Go to the **Status/Dates** screen under the **Employee menu \ Basic Information** of any one employee.
- Enter the **“Email Address”**.
- Click on the **Mail** icon on the toolbar to send an email.
- If the email is sent out successfully without any error that means the SMTP information is set up correctly.



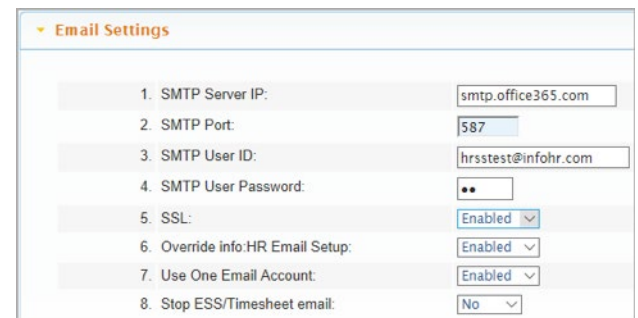
ESS/Timesheet Email Setting

For ESS/Timesheet to send out emails successfully you will need to set the SMTP information under the **Email Settings** section on the **Application Settings** page in ESS/Timesheet web modules.

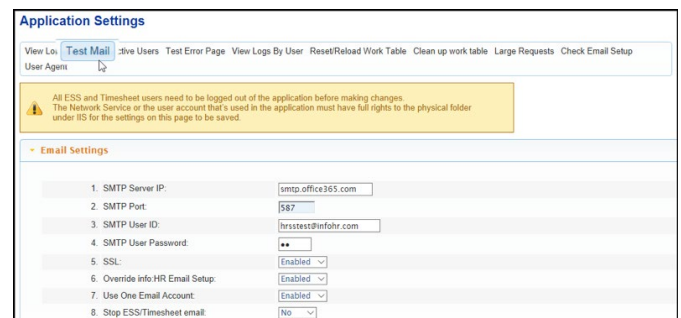
- To log onto the **Application Settings** page, you will first need the Application Settings menu option on the ESS/Timesheet Login page. This is accessed by appending **?c=1** in your ESS/Timesheet URL. e.g. <http://www.hostedinfohr.com/custdemo/infohr.aspx?c=1>



- Enter the SMTP info under the **Email Settings** section.



- To test this setting, click on the **Test Mail** link on the same Application Settings page.



- Check the appropriate “Mail Server Anonymous” or “Authenticated Access” depending on your Office 365 setup. This will populate the rest of the Mail Server information based on what you have entered on the Email Settings section in the previous page.
- Enter a Message and click on the “Send Mail” button.
- If the email is sent out successfully without any error then it means the SMTP information is set correctly, otherwise you will have to try with different SMTP settings.
- Finally, click the “Save Settings” button at the bottom to ensure the new settings are in place going forward.

The screenshot shows a web form for email settings. At the top, there are three checkboxes: "Test with Gmail", "Mail Server Anonymous", and "Authenticated Access". Below these are several input fields: "Mail Server:", "Port:", "SSL" (checkbox), "User ID", "Password", "From:", and "To:". A large text area for "Message:" is located below the "To:" field. At the bottom of the form, there is a "Send Mail" button and a "Go Back" button. Two red arrows point to the "Mail Server Anonymous" and "Authenticated Access" checkboxes.

If the settings outlined here do not work, then your IT might have to call us and we can work together on this.

If you have any questions or comments or need any assistance with this 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 416-599-4747 or email us at support@infohr.net.

Note: Year End Procedure

For many of you December would be the last of month of the entitlements period and you will need to perform Year End Procedure in info:HR. I recommend you download the latest Year End Procedure documentation from our website or email us at support@infohr.net to get a copy. If you need one of us to go over the Year End Procedure with you over the phone, please call our support line or email us at support@infohr.net 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!

Employee/Manager Self-Serve – Beyond the Next Release

by Jerry Rowland, Chief Technology Officer



In our spring newsletter I wrote about some of the enhancements that will be coming in version 5.3 of ESS (you can see that issue [here](#)). Some of those changes lead naturally to what we plan to do next.

Our long-term goal is to provide as much employee data management as

possible within ESS. That will allow HR, Payroll and other administrative staff to manage the employee files without the need to have the info:HR application installed on their work or home computers. (Access to ESS from outside an organization's firewall will still have certain IT restrictions, most notably that there must be an SSL certificate in place on the web server. You'll need to discuss the ramifications of this with your IT and data security staff).

So, with the goal of increased data management via ESS, here are some of the features we are looking at. As with all other screens and functions in ESS, there will be appropriate security settings made available, so don't worry that unauthorized individuals will have access to restricted functions – you'll still be able to control that, as you do now.

Ability to add a new employee

Adding a new employee involves completing several screens. The minimum set is **Demographics, Status/Dates, Position** and **Salary**. You might complete additional ones, and hopefully you use the **Setup / New Hire Procedure** to identify the screens you want included. Not all of those screens are available in ESS, and for the ones that are, not all of the fields on the screens allow data entry. So, we'll have to restructure the screens to give full data entry access on the screens that are already there.

And, we'll add several new screens that you need to properly add a new hire, specifically,

- **Status/Dates**
- **Banking Information**

There is already a security feature for performing the new hire function, and you can see it on the **Setup / Security / Security Master** screen on the **Basic 1** page:

Basic 1	
Maintain	Inquire
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Employee Demographics / Dates <input checked="" type="checkbox"/> New Hire

Enabling or disabling that feature, along with the appropriate department security settings, will give you the ability to assign the new hire function to selected personnel outside your HR department.

New and improved functionality

In version 5.3 and earlier of ESS you do not have the ability to modify Position and Salary records. Version 5.4 will provide that capability so that you can make changes to existing records, in addition to adding new ones, as in the case of a new hire. Similarly, you will be able to add, change and delete records on the Benefits screen – right now it's a display-only screen.

More reporting

Right now, we have about half a dozen popular reports that can be run from ESS. We intend to add more, and we'll be soliciting input as to which ones they should be. The HR and Payroll departments have access to the full suite of reports in the core info:HR HRIS engine, but the general employee population is restricted to ESS reports, so we'd really like to add reports that employees and managers would find useful. If you have suggestions, please email me at jerryr@infohr.com.

Updated User Interface

In ESS version 5.3, which you'll see shortly, we have new screens that are part of our Applicant Tracking module. These screens use new display mechanisms that are cleaner and easier to read. We'll convert all the existing screens over time to use these new display mechanisms. We don't want to delay other new features such as those I've described here, so rather than holding them up to do the display conversion all at once, we'll convert screens as we need to make changes to them for other purposes. So, as you periodically do an update to your ESS install, you'll notice that more and more screens use the new display format.

These changes we'll keep us busy for most of 2019, so stay tuned as we announce their availability over the months ahead.

FREE WEBINARS IN 2019

Topic	Date	Time
Year End	January 17	1:00 PM EST
Flags, Follow-Ups, Comments, and Counselling	February 20	1:00 PM EST
Reporting	March 21	1:00 PM EST
Year End	April 18	1:00 PM EST
Continuing Education and Training Plans	May 23	1:00 PM EST
ESS Course Administration	June 20	1:00 PM EST

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. On the 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.



277 Roxton Road, Toronto ON M6G 3R1
Telephone 416.599.4747 Toll Free 1.800.567.4254
www.infohr.com