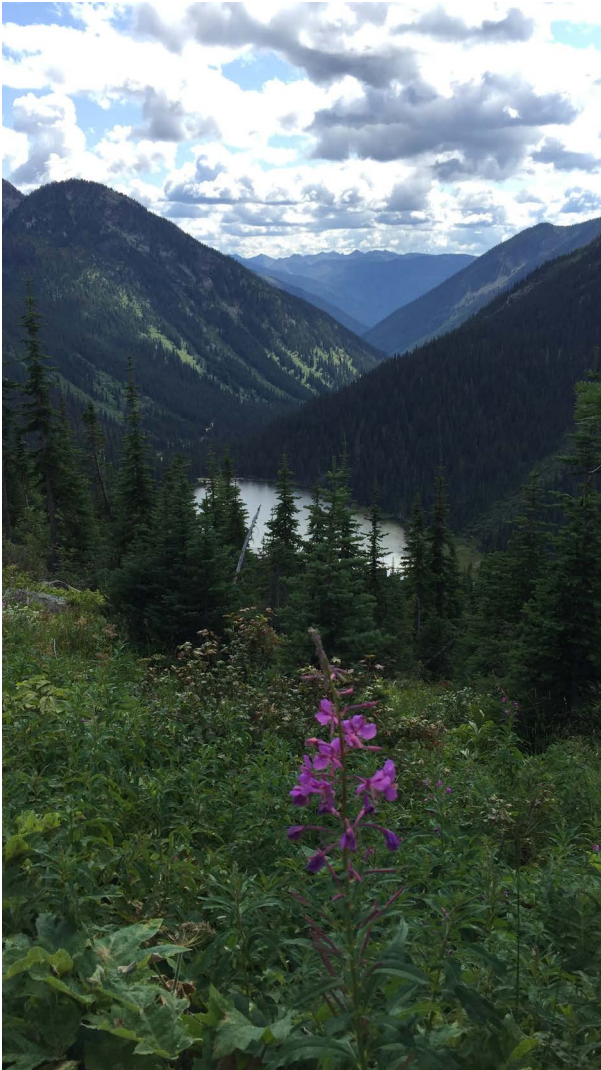
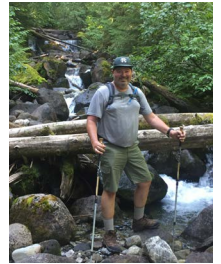


info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Fall 2019



I recently spent one week on a wellness and hiking trip just north of beautiful Nelson, B.C. on Kootenay Lake. I went primarily for the hiking and was not disappointed. The hiking was much tougher than I or any of my 15 other hiking pals had expected. This was a good thing. We really wanted to push ourselves to our limits. The week was jam-packed full of yoga, exercise classes, and very informative talks on a wide range of wellness topics. While it wasn't a weight-loss retreat, I did lose 12 lbs.! Our meals were very high in protein but totalled only 1,400 calories per day. Factor that together with 6 hour hikes up mountains and you can see how fast we were losing weight and building muscle mass.



It was exhausting and thank goodness for the end of day massage treatments and hot tub sessions. I learned so much from the talks on a wide range of topics including nutrition, stress management, and sleep. The common theme throughout was controlling your hormones by increasing the level of "good" anabolic hormones and decreasing cortisol or "catabolic" hormones. It's not that complicated to understand but harder to make the life changes necessary to achieve positive results. I'm doing my best and noticing I have more energy and am sleeping better.

More and more companies are doing what they can to assist their employees live a healthier lifestyle, therefore resulting in higher productivity (as the studies are showing). One example of this is companies such as Google, Uber, and Ben & Jerry's purchasing sleep-pods for their employees to have 20-30 minute naps during the day to improve productivity in the afternoon. Can you imagine a scenario like this in your workplace? Your boss asks you where an employee is and you tell them she or he is in the sleep-pod having a nap!!

We are most likely a long way off from widespread use of sleep-pods but more and more the world is focusing on living a longer and healthier life. My week in B.C. was a Game-Changer for me and I'm hoping this 58-year-old guy can keep it going.

I wish you all the best in achieving your own wellness goals. Keep it simple, e.g. take the stairs, skip the fries, go for that after dinner walk, etc. And treat yourself once in a while too. Have a great Fall and Winter Season!

Andy Staniewski

IN THIS ISSUE

Community Health Centres of Northumberland/2
New Clients/5 Tips and Techniques/6
Webinar Schedule/8

Community Health Centres of Northumberland: A productive ten years with info:HR



Established in 2008, the Community Health Centres of Northumberland (CHCN), located in Port Hope Ontario, is a community-centred primary health care facility, and a member of the Alliance for Healthier Communities, the advocacy organization for non-profit, community-governed, multidisciplinary primary health care agencies. With a vision rooted in providing comprehensive primary care services delivered by an interdisciplinary team of professionals to promote healthy communities, it offers a range of community-based services and responds to health-related community concerns.



From the beginning, and with a staff of approximately 50 employees, managing the HR portfolio fell to Taryn Rennicks, Director of Corporate Services (pictured). Everything was new, and in the early days the level of automation for back-office functions like HR was very minimal.

“It was hilarious. We had staff filling out archaic paper timesheets,” says Taryn. “We needed to track many of the usual exception time categories—vacation, sick time, float days, things like that—but we also needed to track employees’ hours worked for reporting requirements to our funder. There was no way we could avoid a timesheet.”

In addition to tracking on paper the time taken from entitlement banks, the time bank balances themselves for each employee were being populated and updated manually. This led to more time spent on recording duties than management wanted, given all their other responsibilities. Just prior to Taryn’s arrival senior management decided that the time had come to replace their manual process with an HR system that could provide a high degree of automation.

Based on a recommendation from another Community Health Centre, CHCN looked into info:HR, and saw that it would fulfil all of their tracking and reporting requirements.

Community Health Centres of Northumberland

As a bonus, the licensing and implementation fees were at a level that allowed them to initiate an expedited purchase process.

Taryn led the implementation. She remembers, "Training was easy and info:HR support was awesome. Michelle Beasley provided the training and implementation assistance to our Accountant and myself. In turn, we provided how-to training for the Online Timesheets module to the rest of our staff. They took to it very well, allowing us to replace the old paper timesheets. We've never looked back."

Michelle recalls that the implementation went smoothly. "We did a number of training sessions to ensure that the employee information needed by the Online Timesheets module was properly entered into info:HR and that security profiles, reporting relationships, items like that were all correct before releasing the module to the general employee population. None of that is difficult or time-consuming, but it needs to be done properly so that everything goes as planned with the rollout."

After several years of operating info:HR in-house from their own server, Taryn needed to consider what would be next. The server was coming to the end of its life, so the CHC needed to look for a cost-effective alternative. By this time, for several years HRSS had been offering clients the option to have their implementation of info:HR hosted on an HRSS cloud server resident at a Rogers Data Centre facility in Toronto. It provides the best of both worlds; it relieves clients of the need to install, manage and maintain the application, but unlike most cloud applications where the location of the data is largely unknown, their confidential HR data remains in Canada.

"Many of our employees use laptops since they are on the go. Now that we run from the HRSS cloud server, they can fill out their online timesheet from wherever they are; they don't have to be in our building, connected to our network."

Taryn felt this was the right move. The migration took just one day, after which everyone was accessing the system with their data from the HRSS server.

Taryn points out an unexpected benefit: "Many of our employees use laptops since they are on the go. Now that we run from the HRSS cloud server, they can fill out their online timesheet from wherever they are; they don't have to be in our building, connected to our network."

As their experience with info:HR has grown, the dependence on HRSS support staff decreased; support calls and emails are much less frequent. One call that Taryn does make is to schedule assistance with her year-end rollover with Barbara Chicago, Client Services Manager.

Community Health Centres of Northumberland

Barbara remarks, "Working with Taryn is always a pleasure. She has been using the system for a number of years now, she is very self-sufficient using the system and her data is always clean. We typically complete the year end process together, as it is something that is only done once a year. It is always a pleasure to work with our clients to ensure that the process goes smoothly.

"I always say, 'I cannot expect you to remember every step when you only do the task once a year.' It also provides us some time to catch up and answer a few questions that may have slipped through the cracks during a very busy year, and also discuss projects for the coming year."

"Our clients get so busy doing the day-to-day tasks that some things—like training plans, reporting and how managers can leverage our online modules to better manage their employees - get lost in the shuffle. Year-end calls allow us to remind our clients to check out our free webinar series so they can refresh on topics that have been forgotten and to consider refresher training to brush up on skills. One of the best options we offer is a Best Practices Audit. The audit gives us the time to review the data in the system and how it is being stored. We can provide our clients with options of how to leverage and utilize info:HR and the web modules to free up more of their valuable HR professional time."

After using info:HR for ten years, it's become second nature for Taryn and the staff. "We know how to push the buttons and spin the dials to get info:HR to do what we need, and it delivers for us. It's been a productive ten years for us and we're looking forward to many more."

"We know how to push the buttons and spin the dials to get info:HR to do what we need, and it delivers for us. It's been a productive ten years for us and we're looking forward to many more."

WELCOME NEW CLIENTS



Adams Lake Indian Band



Brunswick House First Nation



Chippewas of the Thames First Nation



City of North Battleford



Curve Lake First Nation



Native Education College



Regeneration Community Services



serving the community since 1971
Services for seniors and adults with disabilities

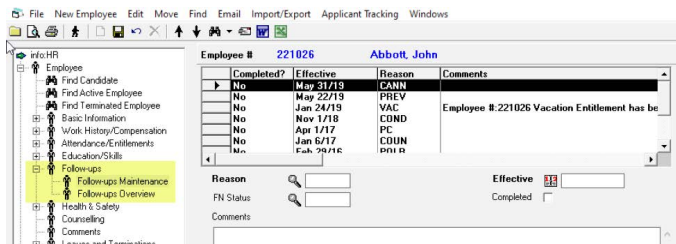
Storefront Humber Inc.

Tips and techniques: Generating Follow-up Emails

by Hemu Mistry, Manager, Application Development

Hello everyone and welcome to this edition of **Tips and Techniques**.

I want to talk about our Follow-up email alerts function in info:HR. In general, our Follow-up screen allows users to keep track of certain types of records as a reminder by their effective date, so when that date is due or approaching the user can act on it. info:HR, by default, creates certain types of follow-up records automatically, e.g. Next Salary Review, Next Performance Review, Employment Status To-Date, Course Renewal, Exceeding entitlements, etc. but users can also create their own follow-up records as well by employee on the **Follow-Up Maintenance screen** located under the **Employee menu \ Follow-ups**.



These follow-up records that are due or approaching due date can be viewed on the **Follow-Up Overview screen** (located under the **Employee menu \ Follow-ups**) or on the **Follow-ups Report** (located under the **Reports menu \ Follow-ups**). They can also be sent out as an email notification.

info:HR has the option to set the email notification options for each of the Follow-Up Codes individually. For each of the follow-up codes set for email notification there are various other options to further define when the email should be generated, i.e. # of days in advance and how often the email should continue to be generated until the follow-up record is marked completed, and also who should get the emails. All these settings are done on the **Follow-ups Code Email Matrix screen** under the **Setup menu**. This menu option is only available if you have security rights to it, located under the **Setup menu \ Security \ Security Master \ More Security \ Utilities**. The follow-up emails are generated only for the follow-up codes defined on this **Follow-ups Code Email Matrix screen**.

Code	Description	Days In Advance	Repeat Frequency
AREN	Associations/Licenses Renewal	30	W
CASH	Cashier check	10	W
COND	Code of conduct	30	D
DR	Discipline action review	3	D
DRIV	Drivers license renewal	30	W
EDTO	Employment Status To Date Review	7	D
EDUC	Training refresher	30	W
PC	Police Check Renewal	60	M
POLR	Policy review	15	W
PREV	Performance review	30	W
PROB	Probationary period ending	7	D

Reason Training refresher

Days In Advance

Repeat Frequency

Employee

Rept. Authority 1

Rept. Authority 2

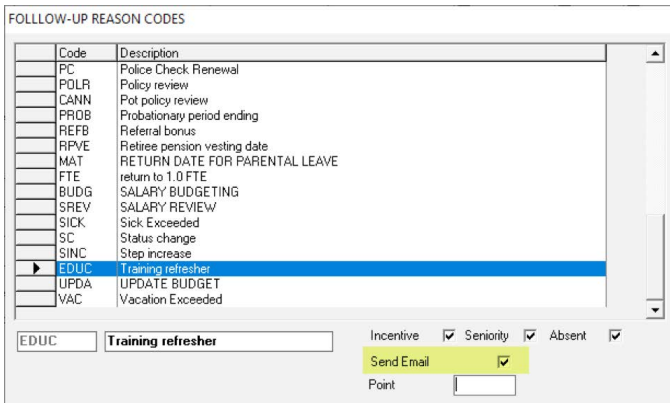
Rept. Authority 3

Rept. Authority 4

Other Employees

Other Email Address(es)

The Follow-Up Code itself is tagged as “Send Email” on the Follow-Up Reason Codes lookup window.



The “Send Email” tag is a toggle switch that gives the user the ability to identify if a particular follow-up code is eligible for automatic email generation.

Once the Follow-ups Code Email Matrix screen is set up, the **Email Setup screen** under the **Setup menu \ Security** also needs to be set up for at least one info:HR user (just one is sufficient). This is because it will contain the email sending credentials like SMTP Server, SMTP Username, SMTP Password and SMTP Port to send out the emails using your email server. This setup needs to be coordinated with your IT department as they will have this information.

The next and final step is setting up a follow-up email sending program on the **Task Scheduler** to run once a day to monitor the follow-up due dates and send out the email notifications as per the **Follow-ups Code Email Matrix** setup and the “Send Email” tag on the Follow Up code itself. The Task Scheduler setup will have to be done on the server where the shared info:HR folder is installed. Once again, this will have to be coordinated with your IT department. IT will have to pick one of the following 3 follow-up email programs to set up on the Task Scheduler depending on how the email server works in your organization. These programs are located in the shared info:HR folder.

1. infoHR_FollowUpEmail.exe

- it uses Port 25 only
- it sends “unauthenticated” emails, i.e. without SMTP User and SMTP Password

2. infoHR_FollowUpEmail_UnAuthenticated.exe

- it uses the SMTP Port specified on the Email Setup screen
- it sends “unauthenticated” emails, i.e. without SMTP User and SMTP Password

3. infoHR_FollowUpEmail_CDO.exe

- it uses the SMTP Port specified on the Email Setup screen
- it sends “authenticated” emails, i.e. uses the SMTP User Name and Password specified on the Email Setup screen.
- it sends emails with SSL turned ON

Once the Task Scheduler is turned on to run this task, the follow-up email notifications will start sending out the emails daily as per the matrix rules. There is also a “**Follow-ups Email Log**” report under the **Reports menu** to give the list of emails that were sent out successfully or those that failed.

Further information can be found on the client portion of our web site. Download the document entitled “**Getting Started - Follow-Up Emails**” found in the **Additional Manuals** section.

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

I hope this section has been informative as previous ones. Once again see you all in our next issue!

WEBINAR SCHEDULE 2019-2020

Topic	Date	Time
Reporting	December 19, 2019	1PM (EST)
Year End Process	January 16, 2020	1PM (EST)
Email Sending Functions	February 20, 2020	1PM (EST)
Reporting	March 26, 2020	1PM (EST)
Year End Process	April 16, 2020	1PM (EST)
Follow-Up, Flags, Comments and Leave Process	May 21, 2020	1PM (EST)
ESS What Managers Can Do	June 18, 2020	1PM (EST)

TO REGISTER for the above webinars, send an email to support@infohr.com. In the subject line of your email indicate the webinar of interest. Space is limited, so in fairness to others please register only if you fully plan on attending. Also, if there is more than one interested party at your organization, share the registration and webinar log in.

You will receive a confirmation that you have been registered. Monday prior to the webinar you will receive a link and any supporting documentation for the upcoming webinar.

Whenever possible, we like to create an interactive environment during our webinars; we encourage questions throughout the webinar. Please, when you are attending mute your telephone or computer microphone to minimize the background noise for other attendees.



HR Systems Strategies Inc. Head Office

277 Roxton Road, Toronto ON M6G 3R1

Toll Free: 1 800 567-4254

Direct: 416 599-4747

email: sales@infohr.com

HR Systems Strategies Inc. Western Canada

#14-24453 60 Avenue, Langley, BC V2Z 2G5

Toll Free: 1 800 567-4254

Direct: 416 599-4747

email: sales@infohr.com

www.infohr.com