info

HR Systems Strategies Inc.
and info:HR software
Client Newsletter
Spring 2020

25th ISSUE

Our lives have been turned upside down with the coronavirus pandemic. It has been heartbreaking to see the loss of life around the world, especially the seniors in retirements homes and care facilities.

I know many of you work in health centres, retirement homes, and businesses that have been affected by the virus. It's been uplifting to see the front-line healthcare workers doing everything they can, their hard work, long hours, determination, and selflessness for people affected by the virus. We are very grateful for everything they are doing. The health experts are saying there is cause for optimism that businesses, etc. can open slowly in a phased approach with people continuing to practice social distancing.

Our business here at HR Systems Strategies Inc. has certainly had to change as a result of coronavirus. For a number of weeks, we had very limited contact with you our clients, so we switched things up and targeted internal projects that we could focus on and help us and you when we come out of this. Projects ranged from new and innovative product developments, catching up on project support tickets, working on product documentation, and developing new product brochures to help us attract new clients to our user base. The results of some of our efforts you can read about in this issue of info. This by far is the biggest issue we've produced since we started publishing 12 years ago and I'm pleased to say it's our **25th Anniversary Issue**, so congratulations to us and to all of you for providing us years and years of support. So, please enjoy!

Andy Staniewski

IN THIS ISSUE

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

Chapleau Cree First Nation: Streamlining Time and Attendance Processes Helps Through COVID-19

Chapleau Cree First Nation is a Mushkegowuk Cree First Nation located by Chapleau Township, about 190 kilometres northeast of Sault Ste. Marie, ON. The First Nation is led by a Chief and five Councillors.

HR Systems Strategies Inc. (HRSS) reached out to Chapleau Cree First Nation in late 2018 when they had already started to look for a better way to modernize their existing manual methods. Edith Larocque, Band Administrator, and team wasted no time and after demonstrations, conducting due diligence, and lining up financing they became a client in early 2019. Like many First Nations, Chapleau Cree's suite of solutions included Employee/Manager Self-Service (ESS), Online Timesheets, the core info:HR Engine, and Sage 300 Payroll Integration for their 50 employees.

Chapleau Cree has employees working in multiple locations—Administration Office, Health Centre and off-site such as Public Works. The challenge for Chapleau Cree First Nation was managing employee attendance and absences, most notably regular hours worked, banked overtime and sick time off.

After getting their data automatically populated into the system, the Chapleau Cree team of Edith, Lori Moreau (Finance Controller) and Connie Martin (Accounting Clerk) began training with Barbara Chicago and they were off! Lori commented, "We were excited to see the system working in our own environment with our own data, doing for us what we saw in the demonstrations. In retrospect it probably wasn't the best time to get started as we were in the middle of our year-end and audit. It was a big change for our staff, but like everything else after getting used to it, they like the system."

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Chapleau Cree First Nation

Previously, employees were doing everything on paper. Lori said, “An employee would fill out a paper time-sheet that went to their Manager. The Manager would review it and sign it. Then it went to the Band Administrator, Edith, who would do the same. Finally, it would end up with us and we reviewed everything yet again. That’s a big process! That’s all gone now."

Says Lori, "We have the Online Timesheets portal and it’s all on the employee now to enter their hours worked and of course they want to make sure they are getting paid accurately. And then there’s the ESS web portal that provides employees the ability to see selected portions of their personnel file and, more importantly, their current balances of all time-off categories to which they are eligible—vacation, sick, banked overtime and more.”

The staff use either their own workstations, shared workstations or their phones to track their time banks and make vacation requests. Lori said, “The employees and managers like the mobile ESS and it would be great to have the same mobile capability for Timesheets, which I understand is coming.”

The automation in place now has paid off during COVID-19. Lori said, “For sure the priority has been and continues to be everyone practicing social distancing and being safe. The system has made it much easier for us to collect data from employees wherever they are rather than the way we were doing it before—pushing paper around and trying to get approvals manually. So, it’s been a big help!”

Chapleau Cree and HRSS have been working together to finalize the integration between Sage 300 and info:HR. Currently Lori pulls a report from info:HR and then enters the information into the Sage 300 accounting system. “It will be nice to have that manual step automated, which we are close to having.”

There are two primary reports that Lori uses. “I generate the Attendance Summary Report as well as the Individual Attendance Report for all employees listed on the summary report.”

Chapleau Cree First Nation is one of HRSS’s clients taking advantage of the hosting service. Lori said, “We are not near a major centre so the Internet Service provided to us was slow to start but we have noticed much better response times now, so the hosting is working well.”

Regarding vendor support Lori added, “Barbara has been great. She did all of our training and if ever I have a question, I call her. I’ve also used the main support group and the team there has been very responsive as well.”

Moving ahead Lori is looking forward to getting the Mobile Timesheets capability and finalizing the Sage 300 integration. “I know there is more in the system we aren’t using yet. Once our workload returns to something more normal we’ll have the time to do that.”

Tips and Techniques: Frequently Asked Questions

by Hemu Mistry, Manager, Application Development

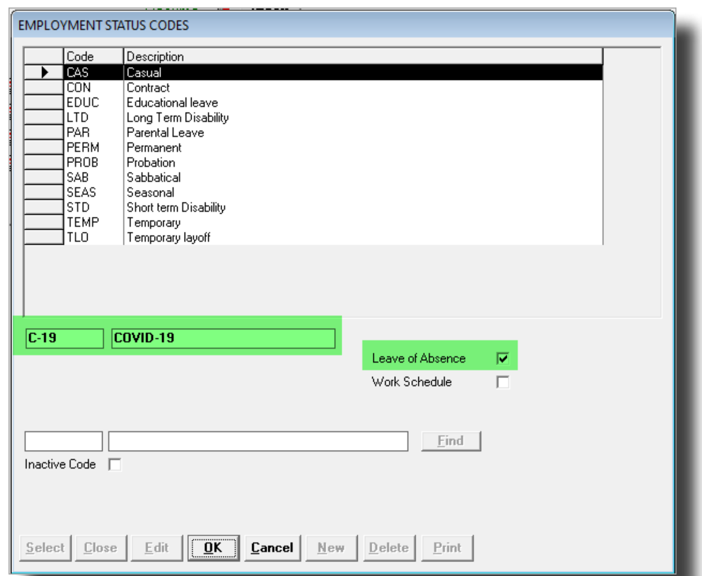
Hello everyone!! I hope you are all keeping safe. Welcome to the Tips & Technique section of this newsletter. In this edition, we have compiled a list of questions we get asked frequently.

Q: How do I see the amount of vacation time my employees were given in previous years?

A: The Accrual report, which is located under the **Reports menu \ Attendance and Entitlements**, can be a great asset if there are any questions regarding the amount of vacation time / sick time or hourly entitlements and even compensatory time (if you are using the Overtime Master) an employee was given. This report will show you annual or monthly **entitlements** for each employee for the entire vacation year/entitlement period. And, it will also show you if this was given as a mass update, or if this was changed manually. Specify the Date Range you are inquiring for under the Selection Criteria and select the appropriate **Accrual Type**. You can also add any other selection criteria as needed and run the report.

Q: How to create a new Leave of Absence code for Covid-19 leave and how to place employees on a leave?

A: The first step to create the Leave of Absence (LOA) type of code for Covid-19 (or for that matter any other Leave of Absence type of code) can be done directly from the **Status/ Dates screen**, located under the E**mployee menu \ Basic Information**, of any employee. The trick is to tag the new code as Leave of Absence type. To do this, from the **Status/ Dates** screen of any employee, call up the code lookup on the **Employment Status** field (as shown in the screen shot here) and click on the **"New"** button. Enter the new code, e.g. C-19, give it a descriptive name, and check the **"Leave of Absence"** checkbox to mark the code as a Leave of Absence type.



This will enable an employee to be placed on COVID-19 type of Leave of Absence in the next step. Click on **OK** to save the new code and then click on the **Close** button to close the code lookup window.

The next step to place the employee on COVID-19 Leave of Absence is to go to **Employee menu \ Leaves and Termination \ Enter a Leave**. Enter the Leave of Absence date range (**From** and estimated **To**) the employee will be away for and then enter **New Employment Status** code **"C-19"**. If you want attendance records to be created as well for the number of days the employee will be on LOA then specify the appropriate **Attendance Code** and click on the Save icon . This will put the employee on a Leave of Absence, change the employment status of the employee (on the **Status/Dates** screen) to **"C-19"** status code and the LOA period will be set as the Employment Status date range.

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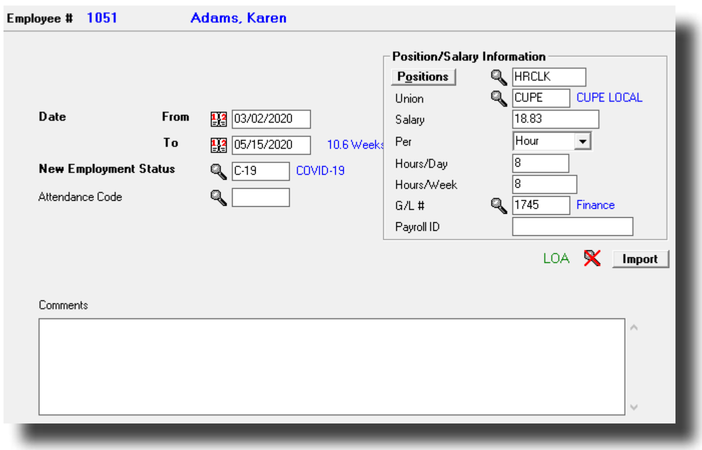
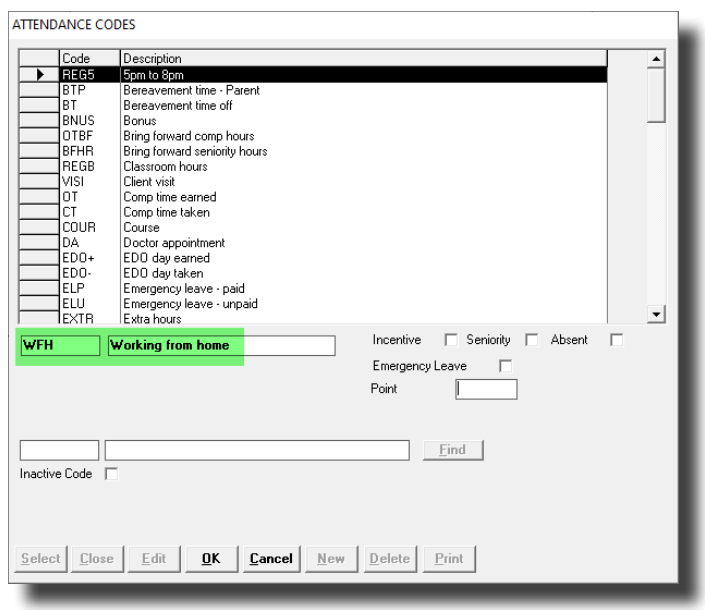


When the employee comes back from LOA, you can reactivate them by going into **Employee menu \ Leaves and Termination \ Reactive from a Leave** screen. Select the employee to reactivate, enter the **New Employment Status** code and specify the date of return as **"Effective Date As Of"**. Click on the Save icon on the toolbar to save the changes. The employee will be re-activated and the new Employment Status will be shown on the employee's Status/Dates screen with the Employment Status **'From Date'** (reactivate date).

If, for any reason, the employee's return to work date changes then go to the **Employee menu \ Leaves and Termination \ LOA Date Change** screen. Select the employee whose return date has changed and enter the **LOA Change To** date. Click on the Save icon on the toolbar to save the changes and the employee's Status/Dates screen will be updated accordingly with the new Employment Status **'To Date'**. If there are any associated attendance records on the Attendance screen of the employee will be updated as well, i.e. excess attendance records will be removed automatically and if the LOA was extended then additional attendance records will be added automatically.

Q: How can I create a new attendance code to record working-from-home hours and have it available in ESS?

A: There are different places you can create a new Attendance code in info:HR. I will mention one of them, i.e. from any one employee's Attendance screen. Go to the **Employee menu \ Attendance/Entitlements \ Attendance** screen of any employee in info:HR. On the **Reason** field call up the code lookup for reasons, which will bring up the Attendance code lookup (as shown in the screen shot below). Click on the **"New"** button and enter the new code for working-from-home and give it a descriptive name. Click on **OK** to save the new code and then click on the **Close** button to close the code lookup window. The new attendance code for working-from-home will be added to the list.



Now when you log into **ESS** and go to **Time Request** page to add a new Time Request, you will see this new working-from-home code under the **Reason** dropdown list.

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Q: I've forgotten my username (or password) (or both).

A: We get this one regularly. It's usually coming from an employee trying to log in to the **Employee/Manager Self Service (ESS)** or **Online Timesheets** module. Unfortunately, we can't help with this one, even if we host your system on our cloud server. Usernames are easy to find, but passwords are stored in the database in an encrypted format. We advise the employee to contact someone in the HR department (we can even suggest who that might be since we have your contact info) and have that person look up the User Name and/or assign a new temporary password. This is done through info:HR—**Setup menu** \ **Security** \ **Security Master** \ on the **Basic 1** screen. Then, instruct the employee to log either into **ESS** or **Online Timesheets** using the temporary password. Employees can create their own passwords using the **Change Password** option. In ESS this option is located under the **Setup menu** on the blue navigation bar. In **Online Timesheets** it's on the menu list on the left side of the grid-style timesheet.

I hope this section has been as informative as previous ones. If you have any questions or comments, or need any assistance with any of the functionality in info:HR, ESS or Timesheets, please do not hesitate to call our support line or email us at support@infohr.com.

See you all in our next issue!

Webinar Schedule 2020

Webinar	Date	Time
Follow-Ups, Flags, Comments & Leave Process	MAY 21	1PM
ESS What Managers Can Do	JUNE 18	1PM
ESS New Features, Multi Day & Quick Approval	SEPT 17	1PM
Training Plans, Continuing Education	OCT 22	1PM
Mobile ESS/Timesheets	NOV 19	1PM
Reporting	DEC 10	1PM

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.

Agreement paying off with PayDirt Payroll reseller Aberdeen Business Consulting!

HR Systems Strategies Inc. is pleased to welcome Aberdeen Business Consulting Ltd., based in Kamloops BC, as a new reseller of our solutions. Ken Aberdeen (CPA, CMA), the owner, has been contributing extensively in the First Nations, not-for-profit, construction, hospitality, and forestry industries for more than 25 years.

Aberdeen Business Consulting has an extensive PayDirt Canadian Payroll client base and the focus of our partnership with be to jointly market, sell, and support PayDirt Payroll users with info:HR's new integration solution.

Ken commented, "When I first saw the info:HR demonstration and how the integration with Paydirt functions, I was very impressed and could immediately see how many of my clients would benefit greatly from using this system."

For more information on this partnership please contact **Michelle Beasley at michelleb@infohr.com** or **Ken Aberdeen at ken@aberdeenconsulting.ca**. Either can answer your questions and provide you with the "info:HR + PayDirt Integration Made Easy" document.

Providing solutions together with The Solution Provider Network Inc.!

HR Systems Strategies Inc. just passed its one-year anniversary partnering with reseller The Solution Provider Network Inc. SPN Inc. has been implementing Sage 300 ERP (formerly Sage Accpac ERP) since 1998. Based in Barrie, ON, SPN Inc. provides services to a vast array of clients, from First Nations and not-for-profit organizations to manufacturing and distribution companies. The focus of our partnership will be to jointly market, sell, and support Sage 300 Payroll users with info:HR's Sage 300 integration solution. The results of the partnership so far have been impressive with joint sales wins including North Bay Indigenous Hub, Hamilton-Wentworth Catholic Child Care Centres, Mississaugas of Scugog First Nation, Dnaagdawenmag Binnoojiiyag Child & Family Services, One Kids Place and Curve Lake First Nation.

Nicole Boileau, Accpac Certified Consultant and President of SPN Inc., commented, "It's been a win-win-win partnership for HRSS, us, and most importantly our joint clients. Jerry, Frank, and the team at HRSS have been great to work with on implementations and I look forward to continued success."

For more information on this partnership please contact **Bill Kennedy at billk@infohr.com** or **Nicole Boileau at nboileau@spninc.org**. Either can answer your questions and provide you with the "info:HR + Sage 300 Payroll Integration Made Easy" document.

info:HR Hosting Services Update

by Bill Kennedy, Manager, Business Development

In 2011 we began offering clients the option of having us host their implementation of info:HR rather than having it installed locally on one of their own servers. We wrote about it in our Spring 2017 newsletter. This alternative has proven to be quite popular, with almost 40 clients since then choosing to have us host.

For new clients who might not have an IT department or even a server, the hosting option is a quick, painless and inexpensive way of getting info:HR up and running for the HR department.

But, it's also attracted existing clients who wanted to move away from supporting the application in their own environment, whether their server was coming to end of life, or to reduce the need for scarce IT resources in performing database backups and applying patches and upgrades, or to improve on application response time and uptime on overburdened servers.

Our cloud hosting service is provided by Rogers Data Centres. The main data centre we use is in Markham, ON with a backup in Ottawa, ON, so all client confidential HR data is stored within Canada. Their service has been tremendous, with virtually 100% uptime since we have been using them.

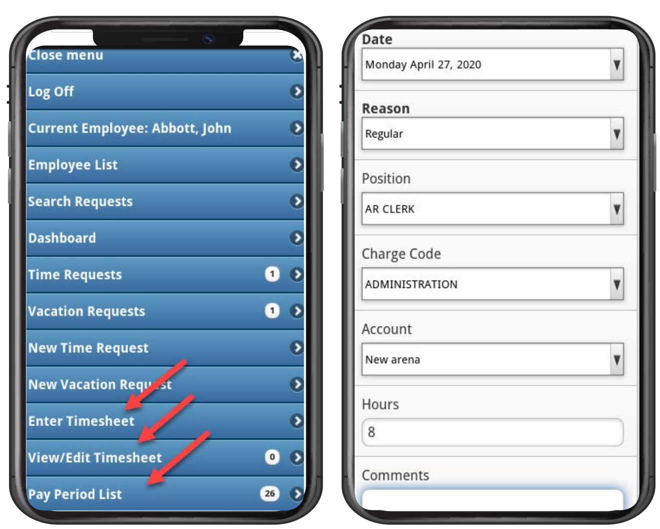
Switching a client from an on-premise to a hosted implementation of info:HR is quick and easy. You would be without the system for one day only while we provision the server, get a copy of your info:HR database for uploading to the server and installing network connectivity software on the workstations for those people in HR and Payroll who use the main administrative module. For those using ESS or Timesheets, all they need is the new URL to the login screen.

If you are thinking of making the switch from on-premise to hosted, please contact me at billk@infohr.com for more information and a quote.

Coming soon to a phone near you...

At the request of several clients with remote workforces, we are adding timesheet entry/submission to our mobile product. This will be available to all clients who currently license the web-based Online Timesheets module. This will be a big assist for employees that don't have desks or computer access but need to track their daily hours worked.

If you would like to join our early user program please contact Bill Kennedy at billk@infohr.com or Michelle Beasley at michelleb@infohr.com.



Charton-Hobbs Recommends New Function in ESS: My Notes

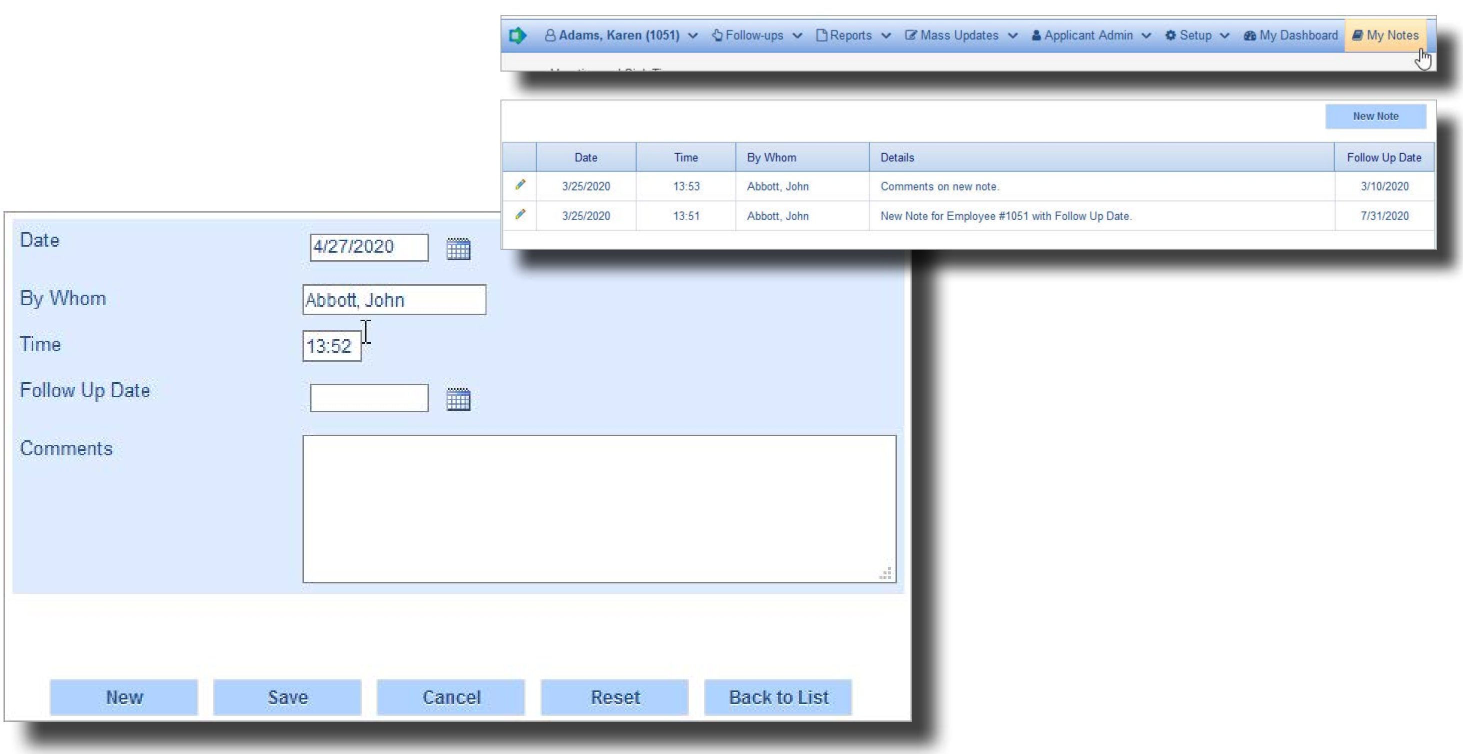
by Hemu Mistry, Manager, Application Development

Charton-Hobbs Inc., a client since 2009, is a wine and spirits importer/distributor with operations across Canada. Gordon Coburn, Sr. Vice President, HR & MIS, is a very active user of ESS and has suggested an enhancement that has made it into the latest release, available to all clients.

We love to receive enhancement suggestions from clients, and this one from Gord is a good one.

You'll find the new function in our **ESS** web module, **My Notes**, on the blue navigation bar. This function allows the user to enter notes for any employee by first selecting the employee for whom you want to enter the notes and then going into the **My Notes** page. This will first show you the list of all the notes entered so far for this employee.

To enter a new note, click on the **New Note** button located at the top of the My Notes list grid on the right side. This will display a New Note form where you can enter the Note Date, Time, Comments and also have an option to enter a Follow Up Date that will create a corresponding follow-up record so the user gets reminded when the follow-up date is due for that Note. In order to have access to this function, you will first need to give users access to the **"My Notes"** security right (**'Maintain'** and/or **'Inquire'**) located under the **Setup menu** in info:HR \ **Security** \ **Security Master** \ go to **Basic 2 scree**n. If you want to see the follow-up record that's created, you'll also need to go to **Security** \ **Security Master** \ **More Security** \ go to **Follow-ups** screen, select the **NOTE** follow-up code and grant **'Maintain'** and/or **'Inquire'** rights.



New Features in Employee/Manager Self Service

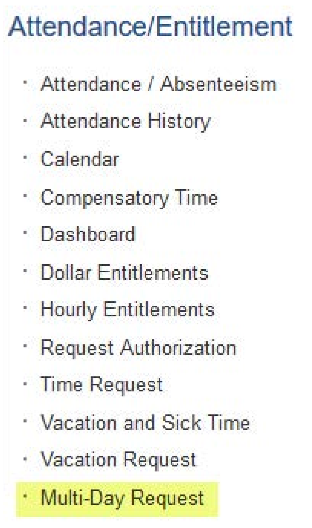
by Jerry Rowland, Chief Technology Officer

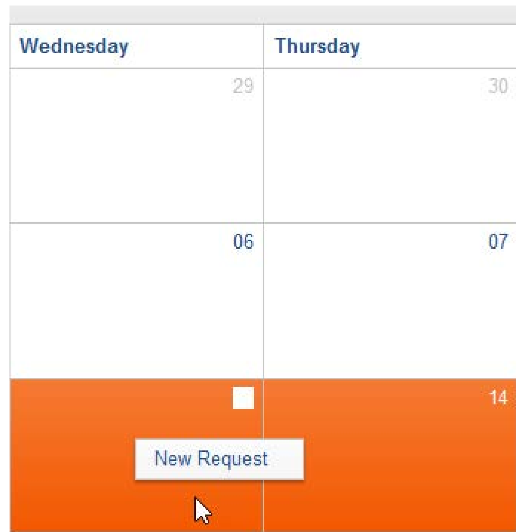
Multi-Day/Reason Time Request

At the impetus of several clients who have a requirement that employees may be absent on a given day for more than one reason, we have added a new feature that allows employees to request time off in a day with multiple reasons. The menu item name in ESS is **Multi-Day Request.**

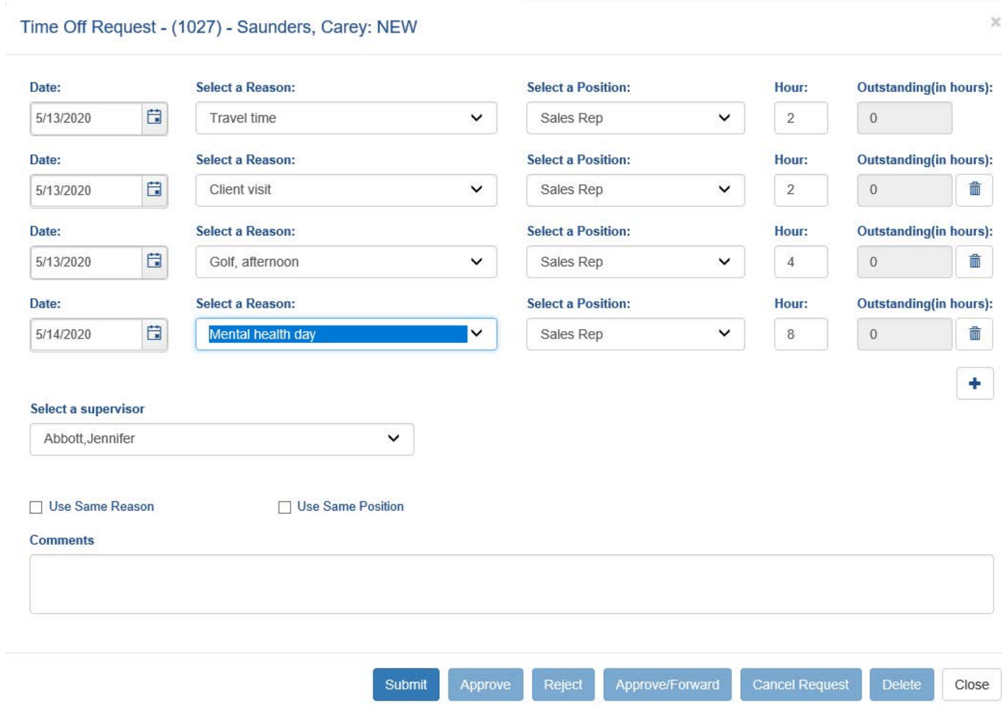
Once selected, the current month is defaulted, and a calendar is displayed. If the time off request is for a different month, select the month and day(s).

Highlight the day(s) desired. Right click and select **New Request.**





The example here shows Carey requesting three different reasons for one day (May 13) and another day off for a different date (May 14). Note that the dates do not have to be consecutive. When she clicks **Submit** an email goes to Jennifer as usual and the submitted entry now appears on the calendar.



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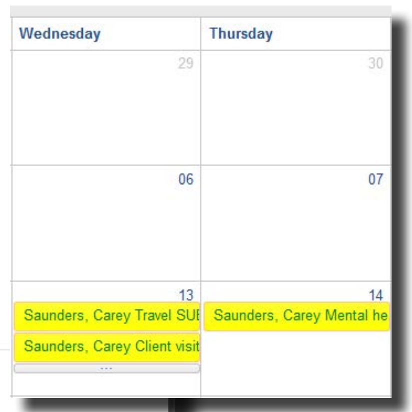
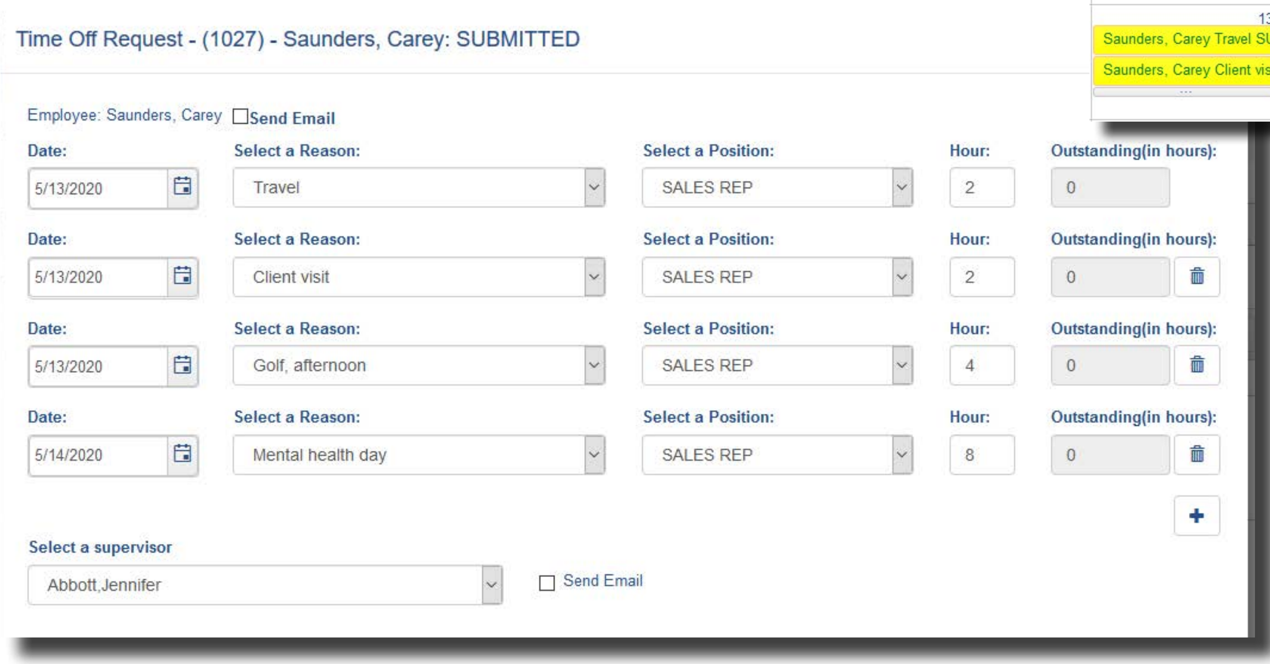
When Jennifer gets the email notification that there is a new request from Carey, she logs in to ESS and goes to the same **Multi-Day Request** screen. She sees the pending request in yellow.

Jennifer double-clicks it (or right-clicks and chooses **Edit**) to see the details. From there she can decide on the request's disposition.

If you want to try out this new request screen, you'll need to activate it in **Application Settings** (it's number 88) Enable Calendar Based Requests and you set it to **Yes**.





Quick Approve

If you decide not to use the new Multi-Day Request screen but rather stay with the current Vacation and Time Request screens, there is a new request approval method on the **Request Authorization** screen.

Now, you can choose to activate a quick approve/reject function that provides the ability to choose the request disposition right from the overview screen, like this:

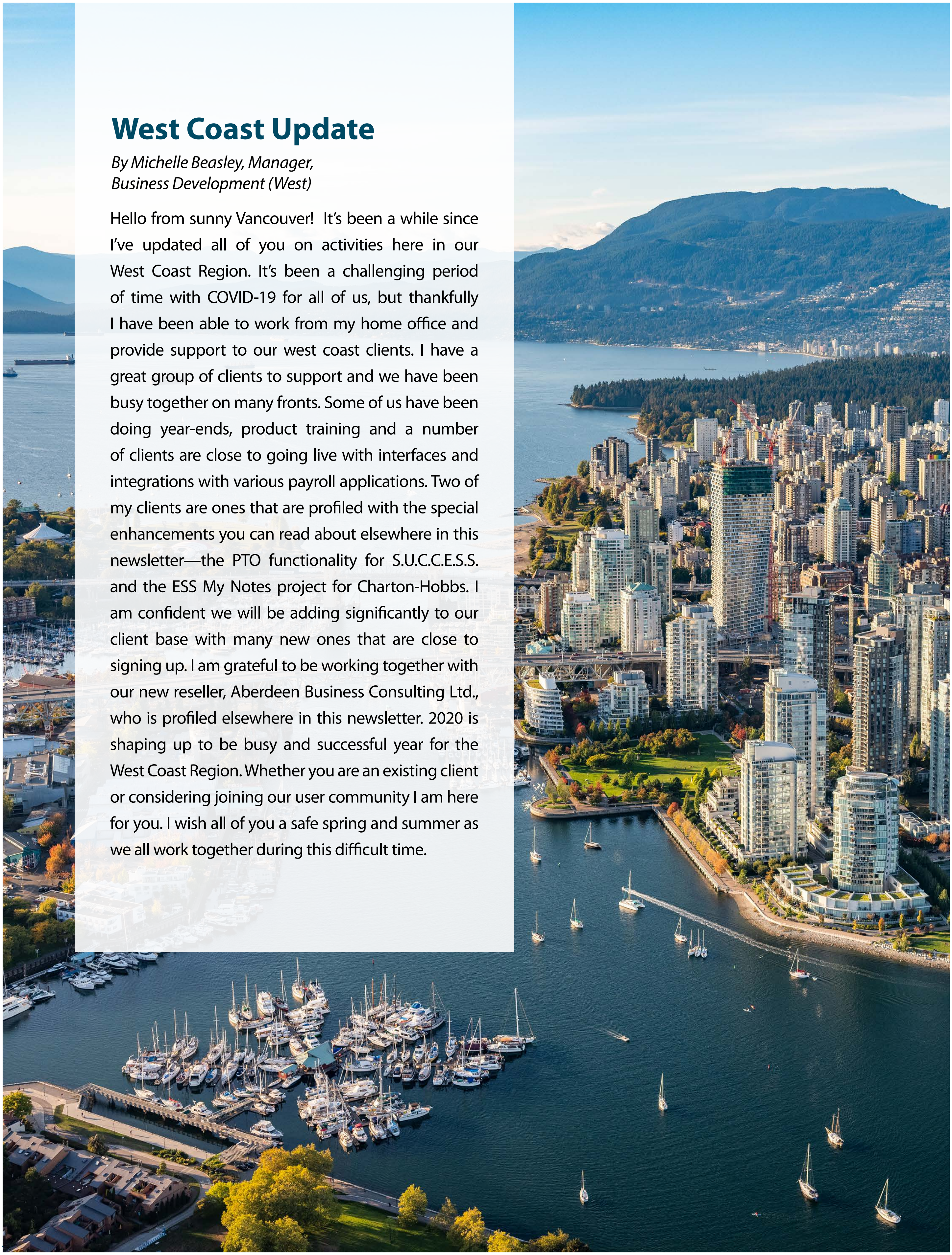
You can click on the **Approve?** or **Reject?** icon right from this screen to perform the action – no need to go to the details screen to select the action from the dropdown list. You can still do that if you want, for example to be able to click the Other Time Off link or to choose Approve Forward or to add a comment.

This new feature is security-controlled so you'll have to go to the **Setup menu \ Security \ Security Master** on the **ESS & Timesheet Web Modules** screen and activate **Quick Approve/Reject** to grant access to this function for your managers.

West Coast Update

By Michelle Beasley, Manager,
Business Development (West)

Hello from sunny Vancouver! It's been a while since I've updated all of you on activities here in our West Coast Region. It's been a challenging period of time with COVID-19 for all of us, but thankfully I have been able to work from my home office and provide support to our west coast clients. I have a great group of clients to support and we have been busy together on many fronts. Some of us have been doing year-ends, product training and a number of clients are close to going live with interfaces and integrations with various payroll applications. Two of my clients are ones that are profiled with the special enhancements you can read about elsewhere in this newsletter—the PTO functionality for S.U.C.C.E.S.S. and the ESS My Notes project for Charton-Hobbs. I am confident we will be adding significantly to our client base with many new ones that are close to signing up. I am grateful to be working together with our new reseller, Aberdeen Business Consulting Ltd., who is profiled elsewhere in this newsletter. 2020 is shaping up to be busy and successful year for the West Coast Region. Whether you are an existing client or considering joining our user community I am here for you. I wish all of you a safe spring and summer as we all work together during this difficult time.



Welcome new clients!

Family Counselling Centre of Brant

Mattagami First Nation

Mushkegowuk Council

North Bay Indigenous Hub

One Kids Place

Hats off to the partnership with S.U.C.C.E.S.S. and the HRSS Professional Services Group

By Michelle Beasley, Manager, Business Development (West)

You might think that managing time off, tracking attendance and entitlements and providing self-service capabilities for employees would be a matter of vanilla, cook-cutter business rules to be incorporated in any HR Information System. Not so. There will always be organizations having unique requirements for how they manage and track entitlements.

HRSS has been fortunate to have S.U.C.C.E.S.S., a non-profit social service organization based in Vancouver, as a client since 2009. We have supported each other for over 10 years and continued to look for ways to automate HR processes as S.U.C.C.E.S.S. has grown to their current size of almost 500 employees. Growth pushes the limits of existing processes and encourages embracing and demanding new and more automated ways of doing things. S.U.C.C.E.S.S.—a forward thinking organization—recognized the need for change and has been working with the HRSS Professional Services Group to confirm requirements and engage in a project to automate the manner in which S.U.C.C.E.S.S. handles its employee PTO (Paid Time Off) entitlement.

Diane Hong, Director of People and Technology at S.U.C.C.E.S.S., commented, "This project enhancement is a "game-changer" for us and will significantly bring about cost and time savings. We simplified our entitlement rules for employees and were able to automate this within info:HR and ESS for employees. So far, so good and thanks to Jerry and the team for making this happen!"

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 (late April, 2020).

On the server:

- Microsoft Windows Server 2012 R2 and above
- Microsoft SQL Server 2012 Standard Edition Service Pack 4 and above

On the desktop:

- Microsoft Windows 8.1 and above

Web browsers:

- Microsoft Internet Explorer version 11
- Microsoft Edge version 40 and above
- Google Chrome version 81.0 and above (the oldest supported version changes frequently)
- Mozilla Firefox version 75.0 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.

Contact us

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HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

info:HR
SOFTWARE