info

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

Welcome to the Fall issue of our client newsletter. It's a good one, jam-packed with two client stories, Hemu's popular Tips and Techniques column, product development news, and other noteworthy items, so saddle up to your favorite Fall-time beverage and enjoy!

I was hoping that by now I would be writing about how COVID-19 is getting closer to being behind us but unfortunately not. Don't worry, this column isn't yet another viewpoint on the virus pandemic. The team here at HRSS just wishes all of you good health through this. It's great to field support calls from all of you, hear your voices and know that you are well and carrying on.

I think a lot of us have done a ton of reflecting and thinking through this pandemic. My partner, Lisa, says it is very dangerous when I start thinking too much! One of my key thoughts over the past months has been how much I really, really love my job and what I am doing. I have had many jobs in the past…some I loved and some I absolutely hated.

My first job was at the age of 12 delivering newspapers. I loved it. It was my own business. It was in the days when you went door to door and collected cash for the paper delivery. I was a compete nerd. I had a collection bag strapped around my waist and had change ready if needed. I think I made about $35 per week, which was a lot of money. I could purchase quite a few comic books for that money. Then my Mom got me a job at Dominion Stores (Metro now). It was a good job. Good money and we got paid in cash every Thursday night! The co-operative work term program at University of Waterloo was great. It allowed me to fund my way through school and I had many unique work experiences that shaped my thinking upon graduation regarding the type of work I was looking for. I was more of a small company, entrepreneurial guy so I went for the small start-up versus the safer big company with nice benefits. It worked out for me but I certainly see the advantages today from friends of mine that are benefiting from the years they worked for a company that had great employee programs. The small start-up turned in to a $25 M in sales success story and shaped my life forever. I have so many friends and family as a result of that experience.

After that very rewarding 20-year experience I had three not-so-great jobs, none of which lasted much more than two years. At the time I couldn't figure out why I was so unhappy and why the jobs weren't a fit. After a while I realized I wasn't doing anything that was really benefiting the world or society or anyone other than myself. That didn't sit well with me. It was important to me that in some way I wanted to feel like I was doing something good. This is why I am so, so thankful for our health-workers, doctors, 1st line supporters, police officers and fire-fighters who are on the front line helping us as citizens and putting their lives on the line.

I am blessed to be leading a team at HRSS that is supporting so many wonderful organizations in the healthcare field, not-for-profits, First Nations, and other important sectors. In some small way I feel we are making a difference and for that I am thankful. I hope that you enjoy this issue of our newsletter! As always, I welcome your feedback.

Andy Staniewski

IN THIS ISSUE

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

North Bay Indigenous Hub manages employee growth with info:HR Sage 300 interface

The North Bay Indigenous Hub (NBIH) is a new service provider that offers Primary Health Care and Early Childhood Development and Learning Services to First Nations, Inuit and Metis People without distinction of status, non-status or residence. The NBIH aims at increasing positive outcomes of the Indigenous community in North Bay and for its partners Nipissing, Dokis and Temagami First Nations.

The NBIH began setting up operations in early 2020. In that short time they have grown from 25 to nearly 40 employees. They had already decided that Sage 300 would be their finance/payroll system and were working with Nicole Boileau of The Solution Provider Inc., a Sage business partner with extensive experience implementing Sage 300 in First Nation organizations. Nicole has other clients using info:HR and interfacing it with the Sage 300 payroll module. She commented, "I've been working with info:HR and the implementation team for several years now and I know how much day-to-day work my clients can save in the Payroll department with the two systems sharing data. For the NBIH we were starting from scratch for both systems, which was ideal—we could be sure to configure both systems in a manner that would take the fullest advantage of both of them."

Finance Officer
Sarah Iahtail

The NBIH would be using info:HR's Employee/Manager Self-Service (ESS) and Online Timesheets modules to collect attendance and absence data for passing to Sage 300 payroll.

Bookkeeping Clerk
Krystal Meawasige

At the NBIH both Sarah Iahtail, Finance Officer, and Krystal Meawasige, Bookkeeping Clerk, took part in the info:HR decision and both subsequently would play key roles in the implementation. From Krystal: "Knowing what info:HR could do in working with Sage 300 made it the top contender. The ease of use perked us all up. Having all our employee data stored in one place, eliminating paper files, giving employees access to the system whether they are inside or outside the office, these would be huge benefits for us."

Sarah added, "Being a small organization at the beginning, we didn't have the luxury of having someone dedicated to HR responsibilities—the duties were spread across all of senior management, including our Executive Director, Laureen Linklater-Pizzale. We wanted a system that would alleviate the manual administrative work that she was doing so she could devote that time to more strategic initiatives."

Continued on next page

North Bay Indigenous Hub: cloud server hosting

The NBIH chose to have HR Systems Strategies host info:HR for them on their cloud server in Toronto. HRSS staff completed the provisioning in early March of this year and training started immediately. The current approach to training sessions is to schedule short, frequent sessions of two hours, each followed by a "homework" assignment—data entry/update work in info:HR that complements the training just conducted and prepares for the next session. The two-hour time frame is much easier to schedule than a full day session and doesn't result in information overload for the attendees.

Barbara Chicago, Manager of Client Services, conducted the sessions and noted, "Sarah and Krystal were a pleasure to work with. They learned quickly, easily picked up the concepts, asked intelligent questions and got the homework sessions done on time, which let us keep to our aggressive schedule. All in all, the implementation went very smoothly."

The NBIH wanted the Sage 300 interface to be up and running as soon as possible, so work on it started even before the first training session. Jerry Rowland, Chief Technology Officer, and Frank Shen, Senior Software Engineer, have implemented Sage interfaces numerous times in the past several years, so they knew how to get the ball rolling even as Sarah and Krystal were taking their first training sessions.

Said Jerry, "We anticipated that the interface work for the NBIH would go very smoothly since both info:HR and Sage 300 were new applications to them. There would be no questionable legacy data to have to reconcile – and that's exactly how it turned out."

"Don't be fooled—no HRIS can offer such a thing as a 'right out of the box' data transfer to payroll. Each one is unique to the client using it, even if that client has the same payroll system as the organization next door."

Krystal pointed out, "Because we were new to Sage 300, in the beginning we didn't know exactly what we would need. And, as we grew, we saw features we could take advantage of to provide even more automation in the interface. Having Jerry and Frank there to recognize those situations and then include them in the interface has made a world of difference."

Jerry stresses, "Don't be fooled—no HRIS can offer such a thing as a "right out of the box" data transfer to payroll. Each one is unique to the client using it, even if that client has the same payroll system as the organization next door. For that reason, every payroll interface project requires some level of configuration and programming customization to capture client-specific uniqueness and ensure the interface operates per that particular client's payroll system requirements. That work is done as a standard part of any interface implementation project and we test that together with the client to confirm that the customization operates as expected. In the case of the NBIH we were fortunate to have Nicole participate as the resident payroll expert."

Continued on next page

North Bay Indigenous Hub: investigating the use of document attachments and more

As Sarah and Krystal expanded their use of info:HR and rolled out the ESS and Online Timesheets modules to all staff, they took advantage of HRSS assistance. Krystal remarked, “Support has been excellent—any time I need a question answered help is literally just a phone call away. At first, we were unsure since it was all new but, with the aid of the info:HR support team and the great little how-to’s that Barbara gave us for our own use and to provide to our people, Sarah and I can deliver assistance to the rest of the staff. Thankfully, we had good training and we are able to feel confident in providing that help.”

The organization is now seeing the results that they had hoped for six months ago. The Sage 300 interface is fully operational, transferring employee master and timecard data from info:HR to Sage. Employees are using ESS to keep track of their time-off balances and submit their absence requests. And for Laureen it has worked out well. She is dealing with much less HR paperwork than before after Sarah and Krystal showed her how to use ESS to respond to the time-off requests that come her way. In fact, she became the first user there of the ESS mobile version, using her phone to check on and respond to those requests.

As for the future, Sarah plans on investigating the use of document attachments, where employee documents can be associated with the employee’s profile and stored in and retrieved from the info:HR database. She will also explore automatic email follow-ups for future-dated activities like performance reviews and certification renewals, to eliminate the need for Outlook

calendar entries and paper to-do lists. Krystal would like to roll out the new Online Timesheets mobile data entry / submission option to make it available for staff who might be away or otherwise not in the office to get their timesheets in for payroll processing. She is also interested in exploring the upcoming ESS feature for employee location tracking (described elsewhere in this newsletter).

When asked if they had any advice for new clients, Sarah suggests that the HR/Payroll staff take all the training available to them. The more you know about what the system can do, the more you can reduce and eliminate manual administrative effort and let the system do it for you. Krystal recommends that you start small, plan and prepare for the implementation, and think ahead for growth - you’ll use the system more than you ever thought you would.

And, as Sarah and Krystal grow and expand the use of info:HR at the NBIH, we at HRSS will be with them to assist as needed every step of the way. They both have proven to be excellent users, so we look forward to hearing about their accomplishments.

Tips and Techniques: Two hints for your IT teammates

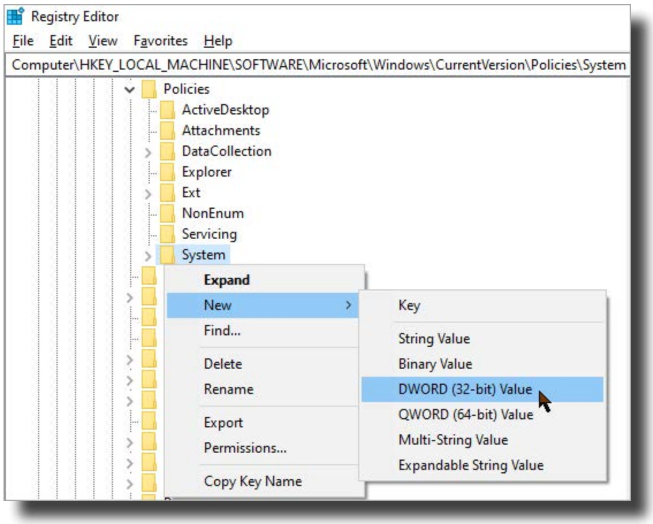
by Hemu Mistry, Manager, Application Development

Hi everyone! Hope you are all keeping safe during this pandemic. Welcome to the fall edition of Tips and Techniques. In this edition I will talk about items that are more for your IT with regards to info:HR and ESS/Timesheets, so please share with them.

Hint #1 - Network Drive Missing during the Export

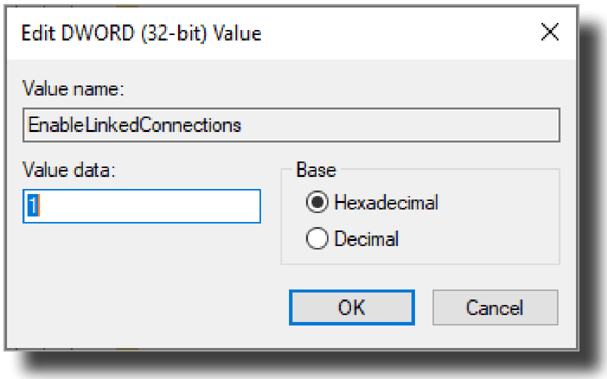
Some of our info:HR cloud/hosted clients have experienced this issue where their mapped/network drives are not available when trying to export a report or a file from info:HR or the Import/Export Module to the mapped drive file path location. To resolve this issue, your IT will need to configure a registry key on your computer the following way:

1. Click **Start**, type **regedit** in the **Start programs and files box** and press Enter to load the **Registry Editor.**
2. In the Registry Editor, locate and then **right click** the following registry subkey: **HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System.**
3. Select **New**, and then select **DWORD (32-bit) Value**



4. Name the new registry entry as ***EnableLinkedConnections***

5. Double-click the **EnableLinkedConnections** registry entry.
6. In the **Edit DWORD (32-bit) Value** dialog box, type ***1*** in the **Value data** field, and then select **OK** to save the changes.



7. Exit the Registry Editor.
8. **Restart the computer.**

Continued on next page

Tips and Techniques

Hint #2 - Latest Patch Download Instructions

Your IT can regularly update your **info:HR to the latest patch** if you are already using **version 8.0 or higher** of info:HR by using the IT Installation Instructions below.

And, if you are also using **ESS/Timesheet web modules** and **your current version is at least 5.3**, then your IT can follow the ESS/Timesheets web module patch download steps listed next to download the latest patch of ESS/Timesheets web modules as well.

These patch download instructions will remain the same until we have a major release, for which you will receive an email from us to inform you about that and with the new patch download instructions that will replace these instructions.

IT Installation Instructions for info:HR Patch:

Please follow the steps below to download the latest release patch of info:HR from our website. If you need any assistance in doing the steps below, please call our support line.

1. Have everyone, including yourself, exit the info:HR systems. If using ESS/Timesheets/Applicant Form web modules, then have the users exit those systems as well.
2. Take a **BACKUP** of the info:HR databases.

info:HR Release v8.2 (or higher) – Patch:

1. Download the files from the links below:
   - infoHR82_SQL_Installation_Instructions.pdf
   - SQL_Scripts82.zip
   - HRUpdt82SQL.EXE
2. Use the **"infoHR82_SQL_Installation_Instructions.pdf"** document downloaded above to install this latest patch of info:HR Release v8.2.
3. Once the update is complete, please let the users know.

If you are also using ESS/Timesheets web modules, and your current version is at least 5.3, then you can follow the steps below to download the latest patch of ESS/Timesheet web modules as well.

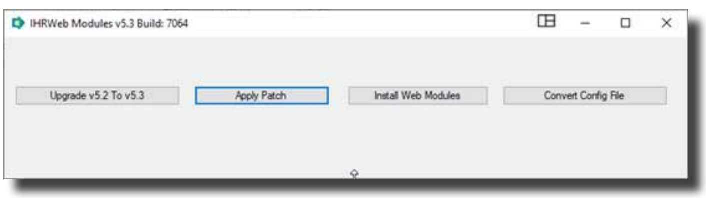
Continued on next page

Tips and Techniques

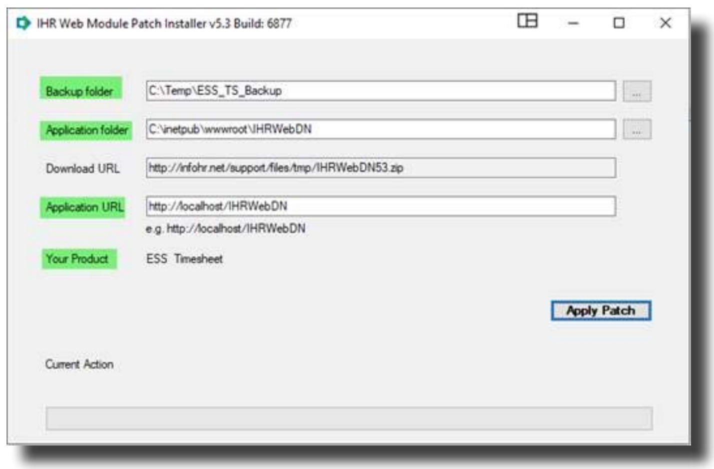
IT Installation Instructions for ESS/Timesheet version 5.3 (or higher) web module patch:

The web update can be installed automatically provided all the prerequisites have been completed prior to starting this update. The link to the prerequisites document is Pre-Requisites.pdf. Below are the automated steps:

1. Have everyone, including yourself, exit the ESS/Timesheets web modules.
2. Download the automated patch program from Updater53.zip.
   a. Unzip the package, **Updater53.zip**, on the web server.
   b. Double click on **IHRWebUpdater.exe (Run as Administrator**).



   c. Click **"Apply Patch"** and click **Yes** when asked to proceed.
   d. Fill the form as required and click on the **"Apply Patch"** button. If you are unsure about any field, please refer to **"IHR Web Modules Installer.pdf"** document (located at IHR Web Modules Installer.pdf) - the **"Patch Process"** section. This document is also be located in the UPDATER53 folder unzipped above
      - Make sure you fill in **your** **"Application URL"** correctly.



3. Once the update is complete, please let the users know.

If you have any questions or comments or need any assistance with this or any other functions 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.net. I hope this section has been as informative as previous ones. See you all in our next issue and be safe!

Major PayDirt Payroll Reseller Partners with HR Systems Strategies!

HR Systems Strategies Inc. is pleased to welcome Stief Group Systems, based in Kitchener ON, as a new reseller of our solutions. Brian Stief (CPA, CA, BMath), the owner and President, heads up the world's largest Adagio Accounting software reseller, of which PayDirt is the standard Canadian payroll module. As part of their team, Lauren Stief (BComm), provides extra depth to support the PayDirt payroll application, as well as Adagio.

The Stief Group team (www.stiefgroup.com) has been offering practical accounting solutions to businesses across Canada for over three decades. They have extensive experience in solutions for not-for-profit businesses, job shops, and distribution sites, among others. Their strengths include conversion and training, software sales and support, and custom programming and reports.

As part of the Adagio Accounting implementation Stief Group has a Canada-wide PayDirt Payroll client base. The focus of our partnership will be to jointly market, sell, and support PayDirt Payroll users with info:HR's new integration solution.

Brian Stief

Brian commented, "We were introduced to HR Systems Strategies by another Adagio partner with whom we work closely. After reviewing information and speaking with Andy Staniewski, the President, we felt that we had many clients who could take advantage of the HR functionality info:HR provides in conjunction with its integration with PayDirt – that was a key component in our decision."

Lauren Stief

For more information on this partnership please contact Bill Kennedy at billk@infohr.com or Brian Stief at brian@stiefgroup.com or Lauren Stief at lauren@stiefgroup.com, (800) 540-3164, for info or support. Any of these individuals can answer your questions and provide you with the "info:HR + PayDirt Integration Made Easy" document.

Training and Education

by Barbara Chicago, Training Manager

Hello and welcome to the Training and Education Column for this issue of ***info***. Formal training is vital—it's the number one thing you and your company can do to ensure you are realizing the full benefits of info:HR. HR is under more pressure than ever to present key personnel data senior executives require to make decisions about your business and to provide a versatile and convenient way for employees to review their profiles and manage their time off. We want to be a trusted partner in ensuring you are getting the full value of the data you've built up in info:HR and streamlining your HR processes.

To that end, we want to make it as easy and cost-effective as possible for you to get the training you require. This column will focus on web-based refresher training or **Web Training.**

Have you been using info:HR for a year or more and are wondering if you are getting the greatest benefit from it? Have you experienced some turnover in HR and question if data input processes are consistent among all staff? It is very common for users to get comfortable with the capabilities of info:HR when it is first implemented. The problem with this is that as time passes, users are not keeping up with the new features that we add to the system. A refresher training session will look at current processes and streamline those with the latest functionality in info:HR.

Some benefits of refresher training include:

- It conforms to your busy work schedule. You have a full work schedule and it's challenging taking an entire day out of your calendar. Web Training sessions are typically conducted in two- to four-hour blocks.
- Web Training sessions are tailored to your needs (I'll give you some ideas later in this column).
- Web Training is great for new hires, much better than forcing a manual on a new starter.
- With Web Training, we will select the instructor that is an expert on the topic. For example, Jerry might conduct benefits training, Hemu might conduct attendance and time banking, I would provide ESS training, etc.
- Web Training is very cost effective. The partial-day sessions have much less impact on your training budget, and there are no travel expenses.
- It's convenient for you and can be conducted in the comfort of your home office, regular office or meeting room.

Refresher courses are customized and tailored to each client and each session, depending on the specific needs. Some of the most common sessions would include:

- New hire processes, leave of absence tracking, employee flags and follow-ups
- Attendance management and reports
- Training Plans, Continuing education tracking, renewals and reports
- Entitlement changes and ESS review

If you would like to find out more details about Web Training and refresher training courses please call me or send me an email at barbarac@infohr.com. Enjoy your fall!

Native Education College: Powering Ahead with info:HR and Powerpay Plus!

By Michelle Beasley, Manager, Business Development (West)

Native Education College
Where Learners Become Leaders

The Native Education College (NEC) is an academic institution located in Vancouver, BC that provides culturally relevant education, training and personal growth for Indigenous learners. They have been a client of HR Systems Strategies Inc. since May of last year. Nancy Xue is their Director of Finance and has been leading the implementation and use of the info:HR solutions. They have 100 employees and purchased info:HR, Employee/Manager Self Service, Online Timesheets, and a payroll interface to Ceridian Powerpay Plus.

Nancy Xue

As a Ceridian client, it was natural for Nancy consider Ceridian's HRIS solution, however, info:HR had functionality Nancy was looking for, including flags and follow-ups, and email notifications for upcoming reminders. She also likes that HRSS offers custom programming options that make daily tasks easier. Nancy said, "The solutions from HRSS fit my budget and I could tell they really wanted me as a client. For example, Michelle Beasley, Business Development Manager, and the President Andy Staniewski took the time to meet me at my office in South Vancouver."

Training took place on-site as Michelle lives close by NEC's office. "This was a huge plus as it gave us the personal touch," Nancy said, "Michelle was and is always close by to provide training and ongoing support. HR System Strategies has been great to work with overall. Michelle, Jerry Rowland, the Chief Technology Officer, and Hemu Mistry, Manager of Application Development, have been a huge asset for training and implementation. They are all very knowledgeable and have provided tremendous support to us during the entire process."

"There were two primary things I was looking for with our investment in the HRSS solutions. Firstly, the time and cost savings we would realize from the functionality of info:HR, ESS, and Timesheets. And secondly, avoiding dual data entry and associated errors with having info:HR and Powerpay Plus integrated together."

Of the HRSS solutions Nancy said, "We are using pretty much all of the basic functionality of the system. Things that I love? We can look online to see whose timesheets haven't been submitted yet, or who has pre-booked vacation until the end of the year. Senior managers are happy that they don't have to manually track employees' time requests. Implementing info:HR has allowed us to get rid of spreadsheets such as benefit analysis, seniority analysis, and pension and union reports. It has also improved our employment history tracking, as I now have it at my fingertips—items like turnover reports are just a few clicks away."

Continued on next page

Native Education College

The Ceridian Powerpay Plus interface project went very smoothly. HR Systems Strategies' approach to working with payroll systems is unique in the industry. Rather than providing generic off-the-shelf connector software or an API, HRSS works in tandem with each client to develop an integration that is unique to that client's requirements. Jerry Rowland summarized it very well, "In my 30-plus years in the industry I have seen countless interfaces to Ceridian, ADP, Sage 300, and others. What we are doing is building on our knowledge, expertise, and the software building blocks we have for each flavor of interface and taking the client's input as to how they want the data flows to work, together with the data they wish to transfer, to deliver an integration that is unique to them. An easy way of explaining what we do is to use an analogy of going into a subway shop and ordering a sub. You tell the server you would like a ham sub and then proceed to say which bread and how you would like it, and all the various toppings to make it your sub. That's what we do. Our competition at best provides a ham and cheese sub shrink-wrapped in plastic wrap!"

Jerry continued, "Working with Nancy and Native Education College was great. We had done many Powerpay Plus interfaces before so I had a good idea going into the project. And Nancy was great. She was knowledgeable, eager and always available when we needed to schedule her time."

The first step was the data mapping. Here, they reviewed the main areas of data transfer—employee master data, benefits/deductions, and timecard data. After Hemu Mistry programmed, the interface testing could begin. As each area was tested, Jerry would check to see if there are any discrepancies between expected and actual data values in Ceridian. If and when there is a discrepancy, Jerry has the interface configured to resolve this issue.

"To existing users—if you are not using HRSS support, I encourage you to do so. They are available to me, transparent, friendly and very knowledgeable."

Nancy summarized the payroll project: "What I really liked about the Ceridian integration is that it is unique and specific to my and NEC's own requirements. Hemu and Jerry were great to work with…knowledgeable and very thorough in their work and communication. I'm happy to report the interface is now live and I don't have to worry about duplicate data entry or errors that were a problem for us in the past. I would highly recommend HR System Strategies to any other users of Ceridian Powerpay Plus."

Nancy had the following to say for other potential and existing clients, "To existing users—if you are not using HRSS support, I encourage you to do so. They are available to me, transparent, friendly and very knowledgeable. And if you are considering HR Systems Strategies' solutions, I would highly recommend them. I know the saying goes, no one ever got fired for going with IBM and HRSS might take a leap of faith, but I did and very happy with my decision!"

Looking ahead, Nancy has seen some of the upcoming enhancements that will be provided. "I am very excited about some of the newer features of ESS and have shown those to some of my employees, who are equally enthusiastic!"

Location Tracking Feature

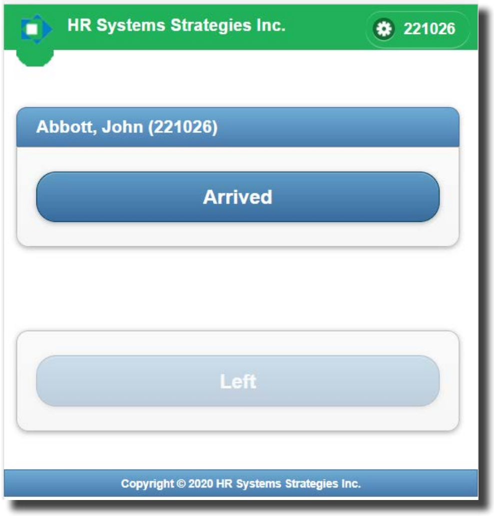
by Jerry Rowland, Chief Technology Officer

HR Systems Strategies Inc is excited to announce a new feature in our mobile and ESS products. This feature will give employees the ability to track when they arrive at a location and when they leave. The GPS coordinates are recorded and in ESS supervisors will be able to view geographically where the employee is or was.

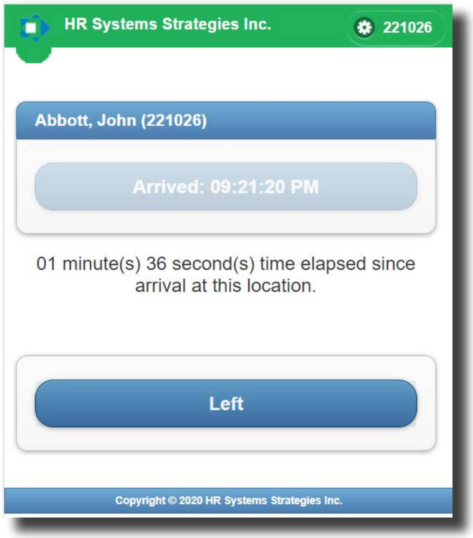
Here's how it works.

Employee logs into the mobile product and opens the menu list. At the bottom of the list, there is a menu item called **Track Location.**

- By tapping on Track Location, you can let the application know that you are arriving at a meeting.

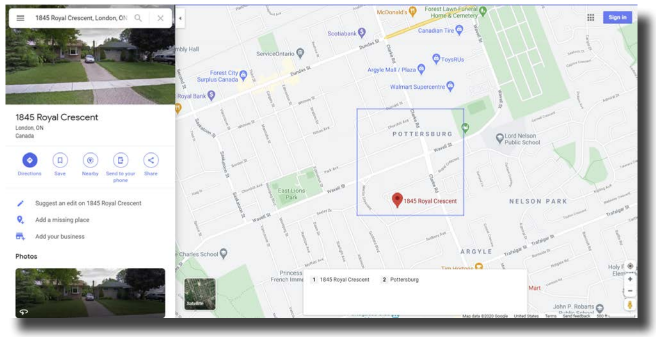


- When **Arrived** is tapped, the application records geographically where you are physically located and a timer begins tracking how long you are at that location.



- When the meeting is completed, the employee taps on the **Left** button and the total time spent is recorded.

In ESS, under the Miscellaneous menu, the new **Tracking Location** is available. A location record is selected and the map will pinpoint where the employee was during that time.



Welcome new clients!

First Peoples' Cultural Council	Haisla Nation Council	Little Shuswap Lake Band	Regional District of Bulkley-Nechako	Tsay Keh Dene Nation

Webinar Schedule 2020

Webinar	Date	Time
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.

Contact us

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

HR SYSTEMS STRATEGIES INC
HUMAN RESOURCES SYSTEMS

info:HR
SOFTWARE