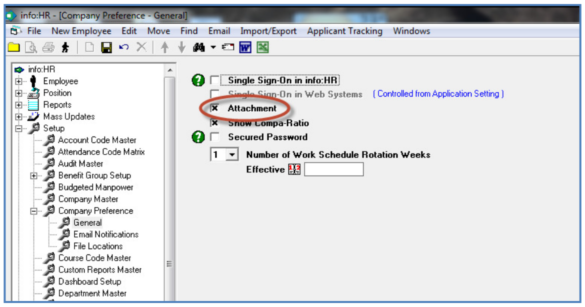
Contents

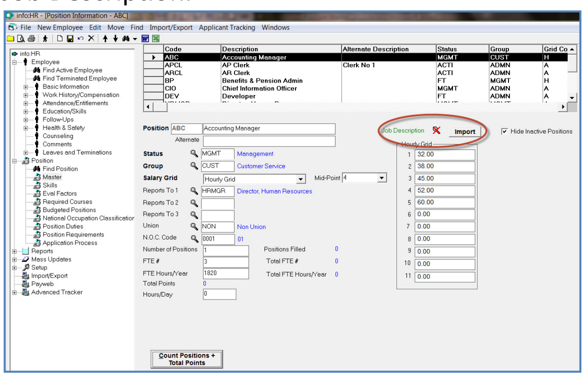
General Information

Attaching Documents

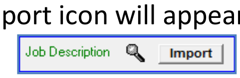
An assumption is made that the Document Attachment option is turned on. To check this, go to the **Setup/General/Company Preferences** screen. Ensure the **Attachment** box is checked.



Throughout info:HR there are various screens that allow the ability to attach a document to a record. For example: On the Position Master screen you have the ability to attach a copy of the Job Description.



The Import icon will appear in two ways.

- 

Without a red "X" over the magnify glass means there is currently a document attached to the record. If you would like to view the attached document simply click on the magnify glass.
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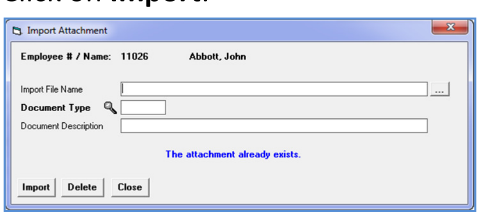
With a red "X" means there is currently no document attached to this record. If you would like to **Import** a document:
- Click on **Import**.



  - To locate the file, click on the three dots button to the right of the file name box and find the file using the lookup facility.

   - Select a **Document Type** code. (*If Document Type has a red "X" over the magnify glass, use the security master to grant access to the code table*.)
   - If desired enter a **Document Description.**
- Once completed, click on **Import** and answer **Yes** to save the document.

To delete the document or replace the document with another one, click on the **Import** button and click on either the **Delete** or **Import** buttons.

Drop Down Lists

Click on the drop down arrow and select one of the values listed. Only one value may be selected at a time.

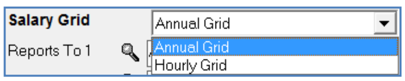
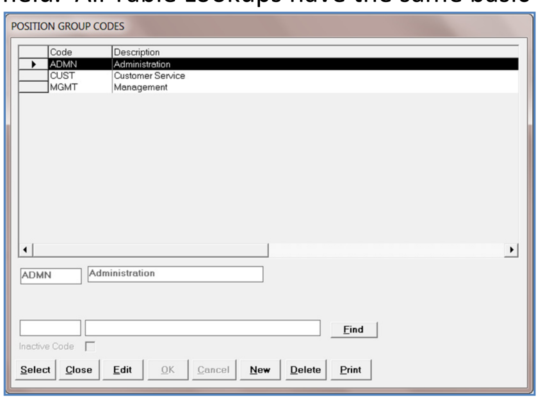


Table Lookups

Anywhere you see a **magnify glass** ( ), there is a code table where the codes are stored for that field. All Table Lookups have the same basic functions.



- To create a new code select **New**
- Enter the **Code** and the **Description**
- Click on **OK**

Note:

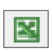
- A search can be made for any code by either typing in the code or description then selecting **Find** - When a code and description shows in red it has been made inactive; the code cannot be used, but the code has been used in the past and the history is maintained in the database.
- Some codes have other options that are maintainable on this screen too. For example, the Attendance Code lookup has “Seniority”, Incentive”, “Emergency Flag”, etc that are maintained via the table code lookup screen.

Buttons

Button	Purpose
Select	Once a code is highlighted, it can either be double clicked on, or click on the **Select** button to choose the code.
Close	Closes the coding table.
Edit	To edit a description of a code and other options; the Code itself cannot be changed.
Ok	When an edit is made select OK to save the changes.
Cancel	Will stop any actions taken.
New	To enter a new Code record.
Delete	To delete a code.
Print	Will print a list of all codes displayed in the table.

Toolbar Icons

The top line in info:HR contains a toolbar. This toolbar is used to assist users with maintenance functions.

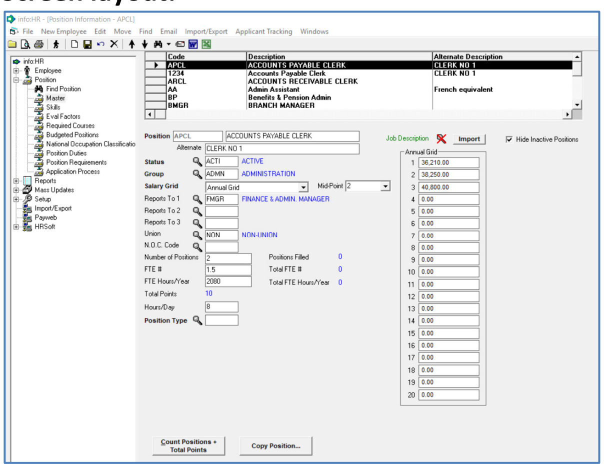
Icon	Purpose
	Close a screen
	View a report
	Print a report
	Initiate hiring of a new employee
	Add a new record
	Save changes
	Undo changes prior to clicking the Save icon
	Delete a record
	Move to the previous employee or position
	Move to the next employee or position
	Look up either Active or Terminated Employees or the Position Master
	Send an email to the email who's 'active'
	Open MS Word
	Open MS Excel

Position Master

There are 9 screens of information used to describe the characteristics of a Position within the organization. Once a *Position* has been set up, you can hire employees into the Position. See documentation for Position, Salary, and Performance for maintaining employee work history. Of the 9 screens available, the only screen that must be completed is the Position Master screen.

Once a position is assigned to an employee, it cannot be deleted. The Status can be changed to "INAC" – Inactive. An inactive Position displays red on the Position Lookup screen.

Screen layout:

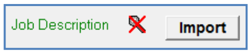


Information Validation

Field	Purpose
Position Code	Enter an alphanumeric code to identify the Position. This Position Code cannot be changed except through the Mass Updates / Codes function.
Alternate	Enter another title for the Position, as required. This Alternate isn't printed or used in info:HR. It's for informational purposes only.
Status	Enter the code that describes the Status of the Position Status code "INAC" is reserved to identify Positions that are no longer active. Other options are Active, Permanent, Contract, Management, Staff, etc.
Group	Enter/look up the code that describes the Group the Position is associated with. A *Group* code generally matches an organization's pay bands. If a collective agreement is present, the Group will be identified in that document. This is an important field when doing mass

Field	Purpose
	updates.
Salary Grid	Choose from drop-down list. This identifies how the Steps will be entered. For example: Hourly or Annual amounts
Reports To 1,2, and 3	Enter/look up the Position code for the reporting authorities. A Position may have up to three Reports To codes. Report To #1 is generally the Position that is directly responsible for the Position. If the current Position reports to multiple Positions, leave the Reports To blank.
Union	Enter/look up the code that the Position is in. If a Position can belong to more than one union/non-union group, leave this blank.
N.O.C.	Enter/look up the code that describes the National Occupational Classification that the Position falls into. This code is only used for Affirmative Action or Employment Equity.
Number of Positons	Enter the budgeted head-count for this Position.
FTE #FTE Hours per Year	Enter the working hours per year for an employee working full-time in this Position.
Total Points	Calculated by the **Count Positions + Total Points** button.
Grid Steps 1 through 20	Enter the salary band for the Position beginning with the minimum wage in Grid Step 1. Do not skip steps. If the salary band only has e.g. 3 steps, use Step 1, 2 & 3 only.
Mid Point	Choose the Grid Step that will be used by the system to calculate compa-ratios. Traditionally, the highest step number is selected from the drop down list.
Positions Filled	Calculated by the **Count Positions + Total Points** button.
Total FTE #	Calculated by the **Count Positions + Total Points** button.
Total FTE Hours/Year	Calculated by the **Count Positions + Total Points** button.
Hours per Day	Enter the “standard full-time” hours per day for this Position.
Position Type	Enter a position type to be used for the Applicant Tracking Module. This field is used to determine the email to be sent to an applicant upon receipt of the application.

Other screen functions:



- A job description can be uploaded using the **Import** button. Please refer to the General Information / Attaching Documents section above.

- By default, this item is checked. The option 'hides' all Position Master entries that have a Position Status code equal to "INAC".
- To view inactive positions, uncheck this box.

Count Positions + Total Points:

- By clicking this button, the system sums the Points in the Evaluation Factors screen for each *Position* and the system uses the Employee's Position screen to count the number of employees assigned to the Position.
- The FTE # and FTE Hours/Year are summed and reported, too.
- Click this button before running any Position/Skills/Evaluation Factors reports.

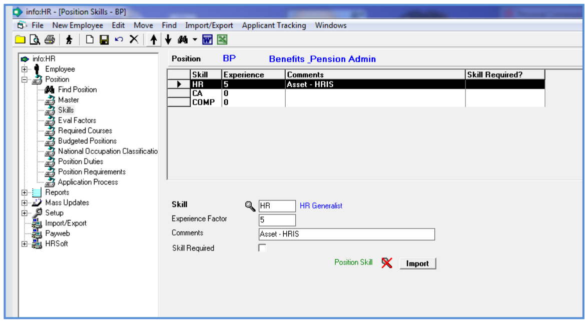
Copy Position…

- Provides the ability to copy the position.

Skills

Use this screen to enter the Skills or Competencies that an employee would need to secure this Position. There can be unlimited number of skill records added for each position. Data from this screen is used in the Gap Analysis report.

Screen Layout:



Information Validation

Field	Purpose
Skill	Enter/look up a code that defines a Skill for this Position.
Experience Factor	Enter the number of years experience that is required.
Comments	Enter comments as needed.

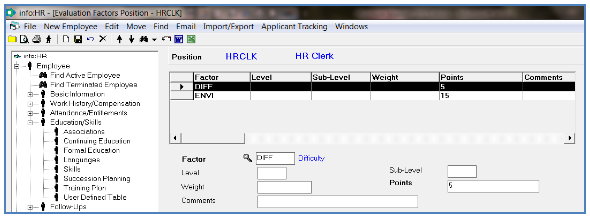
Buttons

Button	Purpose
Import	Provides the ability to attach a document.

Eval Factors

Use this screen to enter the scores from the Position's Job Evaluation. Primarily, this function is used for pay equity programs but can be used to determine salary bands within jobs with similar responsibilities. This screen is used when the "Count Positions & Total Points" button is pressed.

Screen Layout:



Information Validation

Field	Purpose
Factor	Enter/look up the Factor code assigned to the Position.
Level	Enter information as needed.
Sub-Level	Enter information as needed.
Weight	Enter information as needed.
Points	Enter the number of points associated with the Factor.
Comments	Enter information as needed.

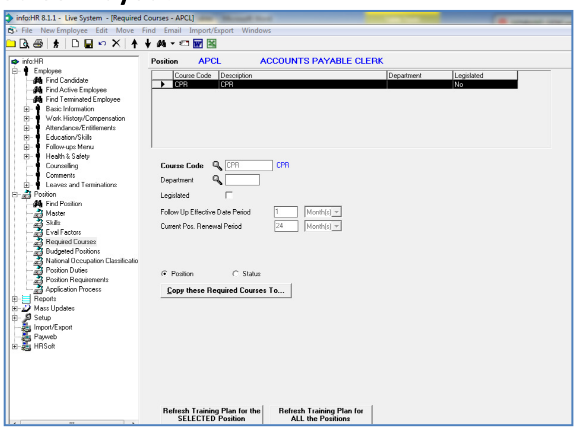
There is no system logic associated with Level, Sub-Level and Weight.

Required Courses

Use this screen to enter the course(s) that an employee must complete to hold this Position. In conjunction with the *Course Code Master*, located under the Setup menu, renewal information can be defined for each course. This information would be used to create or maintain an employee's Training Plan.

The Training Matrix and Training Plan reports use information from this screen.

Screen Layout:



Information Validation

Field	Purpose
Course Code	Enter/look up the Course Code from the Course Code Master.
Legislated	Click the *Legislated* box if the course is also legislated.

If a course has been marked as "Unique for each Position" on the Course Code Master screen, then the renewal period will have to be entered in order to compute the course's Renewal Date automatically on the Training Plan.

- **Follow Up Effective Date Period** – When an employee attains this Position, specify the period of time by which this course needs to be taken.
- **Current Pos. Renewal Period** – If the course requires periodic renewal after it is taken, specify the renewed period. Otherwise, leave it blank.

Note: The Renewal Date computation formula depends on:
Course never taken before:

- Follow Up Effective Date Period + current Position's Start Date

Course taken before:

- Current Pos. Renewal Period + last Course Taken Date

Other screen functions:

Copy these Required Courses to…

- This button provides the facility to copy Required Course codes from:
    - One Position to another.
    - One Position to a group of positions that fall within a Position Code Status.

Buttons

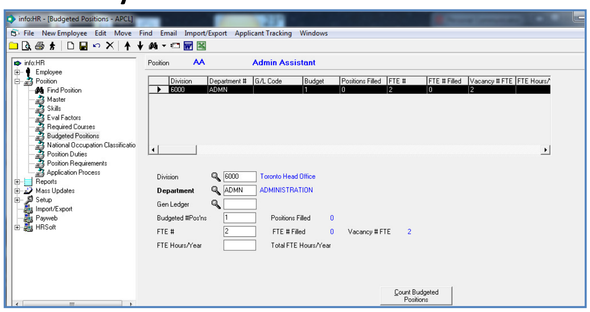
Button	Purpose
Refresh Training plan for the SELECTED Position	Provides the ability to update employee training plans for the currently-displayed position, after changes have been made to the training plan.
Refresh Training Plan for ALL the Positions	Provides the ability to update employee training plans for all positions, after changes have been made to the training plans.

Budgeted Positions

Use this function to record the number of positions that are budgeted within an organizational structure. The feature provides a greater headcount analysis since a Position may be associated with one or more departments. One Position can be split across multiple groupings defined below.

The information on this screen is used in the Plan of Establishment report found under the Reports/Employee Information menu.

Screen Layout:



Information Validation

Field	**Purpose**
Division	Enter/look up the Division from the Division Master.
Department	Enter/look up the Department from the Department Master.
G/L Code	Enter/look up the G/L from the G/L Master.
Budgeted # Pos'ns	Enter the number of Positions for the organizational structure.
FTE #	Enter the number of FTEs for the organizational structure.
FTE Hours/Year	Enter the standard FTE Hours per Year for the organizational structure.
Positions Filled	Calculated using the **Count Budgeted Positions** button.
FTE # Filled	Calculated using the **Count Budgeted Positions** button.
Vacancy # FTE	Vacancy is calculated by subtracting the FTE # Filled from the FTE # columns.
Total FTE Hours/Year	Calculated using the **Count Budgeted Positions** button.

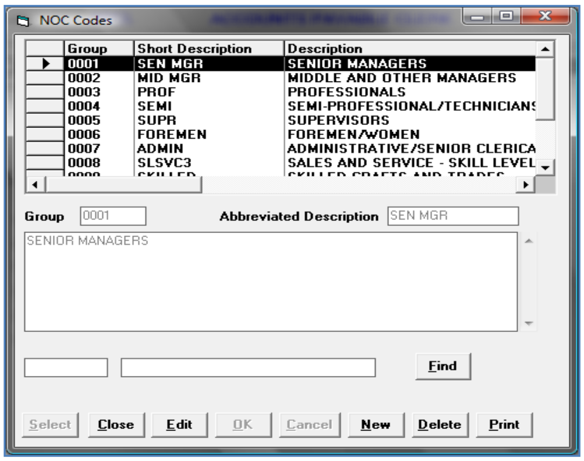
Buttons

Button	Purpose
Counted Budgeted Positions	Clicking this button counts the active employees and updates the Position Filled, FTE # Filled, Total FTE Hours/Year and calculates the Vacancy # FTE.

National Occupation Classification

This table identifies the National Occupation Classifications for the purpose of Employment Equity in Canada and Employment Equity/Affirmative Action in the United States. The code is used on the *Position Master* and *Employment Equity* screens. A sample of NOC codes are provided with the application. They can be deleted, maintained or used as needed.

Screen Layout:



Information Validation

Field	**Purpose**
Group	Enter a Group Code.
Short Description	Enter an abbreviated description for the Group Code.
Description	Enter a long description for the Group Code.

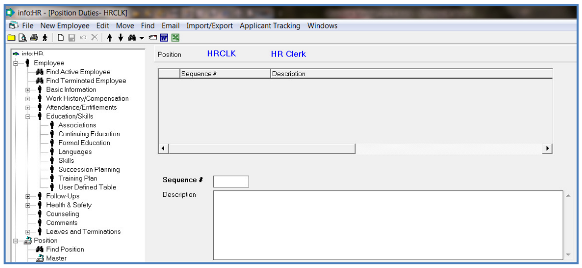
Buttons

Button	**Purpose**
Find	Will locate a NOGC record based on the description entered.
Select	Once a code is highlighted, it can either be double-clicked on, or click on the **Select** button to choose the code.
Close	Closes the table.
Edit	To edit a Description or Abbreviated Description; the Group itself cannot be changed.
Ok	When an edit is made select OK to save the changes.
Cancel	Will stop any actions taken.
New	To enter a new code.
Delete	To delete a code.
Print	Will print a list of all codes displayed in the table.

Position Duties

The purpose of this screen is to list the position duties in a sequential order. This information is only used by the info:HR Applicant Tracking module. Otherwise, it is not used.

Screen Layout:



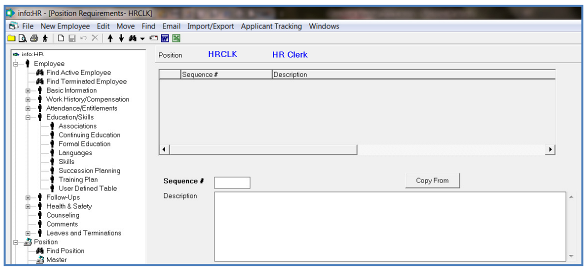
Information Validation

Field	Purpose
Sequence #	Enter a number. This number does not have to be 1 but could be in increments of 10s or 100s. When the duties appear in the Job Posting module, they will be in Sequence # order.
Description	Enter text describing the sequence.

Position Requirements

The purpose of this screen is to list the position requirements in a sequential order. This information will appear if the user has the info:HR Applicant Tracking module. Otherwise, it is not used.

Screen Layout:



Information Validation

Field	Purpose
Sequence	Enter a number. This number does not have to be 1 but could be in increments of 10s or 100s. When the duties appear in the Job Posting module, they will be in Sequence # order.
Description	Enter text describing the sequence.

Other screen functions:

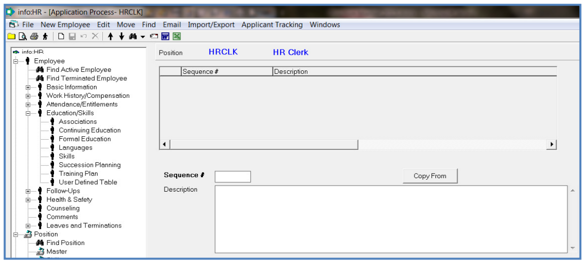
Copy From:

- This button is used to copy Position Requirements from one Position to another.
- Once pressed, a list of active Positions is displayed. Click on **Select** to begin copying the Position Requirements from that Position into the current Position being displayed.

Application Process

The purpose of this screen is to list the application process in a sequential order. This information will appear if the user has the info:HR Applicant Tracking module. Otherwise, it is not used.

Screen Layout:



Information Validation

Field	Purpose
Sequence	Enter a number. This number does not have to be 1 but could be in increments of 10s or 100s. When the duties appear in the Job Posting module, they will be in Sequence # order.
Description	Enter text describing the sequence.

Other screen functions:

Copy From:

- This button is used to copy Application Processes from one Position to another.
- Once pressed, lists of active Positions are displayed. Click on **Select** to begin copying the Application Processes from that Position into the current Position being displayed.