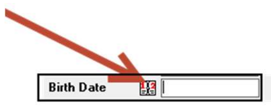
Contents

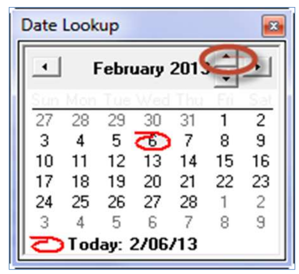
General Information

Date Lookups

For any field that requires a date be entered, you can either type the date manually (remember to use the date format set in Windows e.g. mm/dd/yyyy), or you can use the date icon () to select a date from the pop-up.

Navigation can be done by clicking on the Month and Year. Once the Month and Year are selected, click on the day of the month that's needed. The right or left arrow keys will increase or decrease the month. The up or down arrow keys will increase or decrease the year.



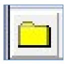


Dropdown Lists

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

Navigating

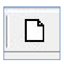
At the top of the info:HR window there is a row of icons which allow you to perform different functions throughout the system.

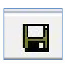
 **Close –** Will close the screen you are working in while leaving info:HR open.

 **View** – Will allow you to view information prior to printing.

 **Print** – Will send the document to the printer without viewing.

 **New Employee** – Will begin a new hire.

 **New Record** – Will allow you to enter a new record in any screen.

 **OK/Save** – Click to save the information entered.

 **Cancel** – Will return you to the last saved point, removing all information entered that was not saved.

**Delete** – Will delete the selected record.

**Row Up/Down** – Provides the ability to move through a list of employees while remaining in the same screen.

**Find** – Provides the ability to select Find Active Employee, Find Terminated Employee or Find Position.

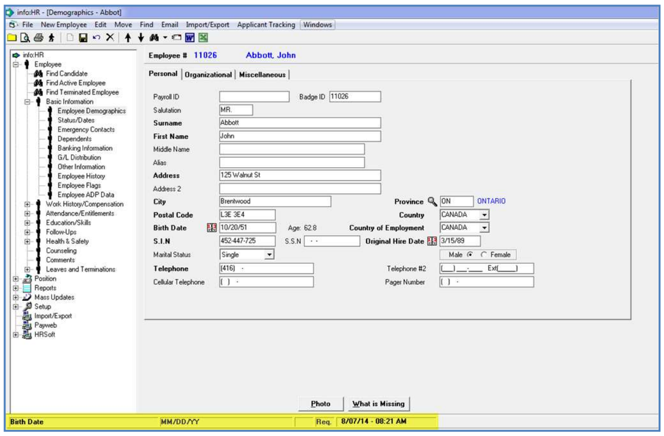
**Mail Box** – Provides the ability to send an email to the employee without closing info:HR.

**Word/Excel** – Provides the ability to open Microsoft Word or Excel without closing info:HR.

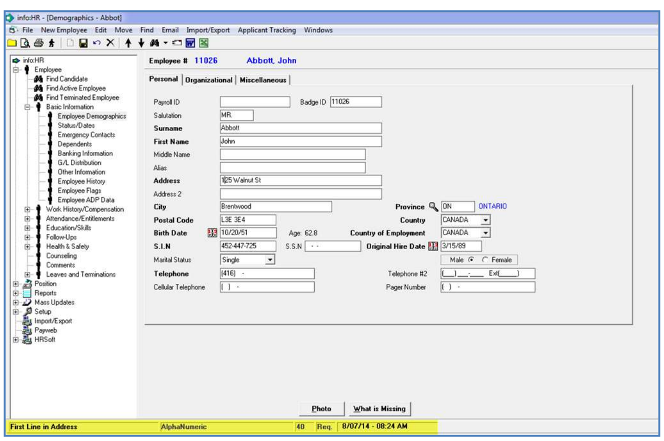
Information Bar

At the bottom of the info:HR window you will notice an information bar. This bar displays:

1. Which field your curser is currently located on.
2. The format of the information to be entered (Date, Alphanumeric, Numeric, Option Button or Combo Box).
3. The maximum number of characters that can be entered in the field.
4. Is the field required or not.
5. The right-hand side displays the current date and time in the format defined by your computer.



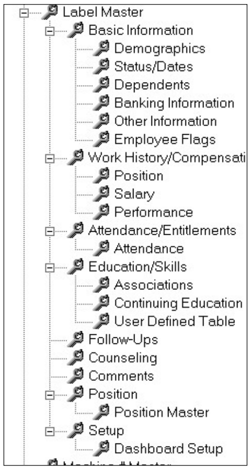
In the screen above notice the information highlighted. The curser is located in the Birth Date field.



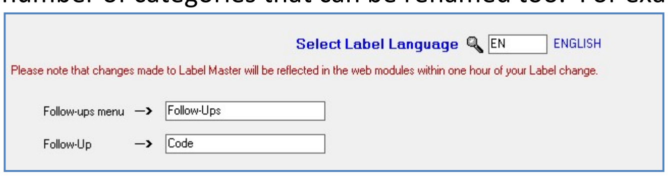
In the screen above the cursor is in the Address field, which is an alpha-numeric field that can hold 40 characters and it is required.

Re-labelling Field Names

There are a number of fields in the Employee Menu that can be re-labelled to reflect your organizational language. This re-labelling table can be found under Setup/Label Master. Then select the screen name where you would like to re-label a field. The screen names are categorized in the same manner as found under the Employee menu item structure.



- This section not only allows for changes to field names in info:HR but there are a number of categories that can be renamed too. For example:

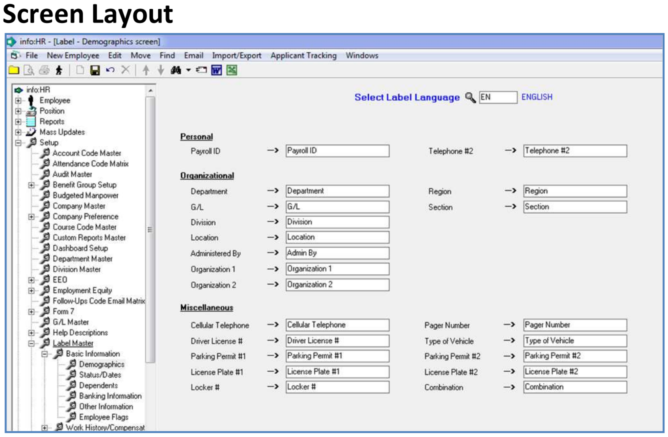


  - The menu structure name and field name are changeable for this function.

Changes made to the Label Master will be reflected throughout the system.

- For example if your organization does not use the label "Location" but would rather use "Branch". After making the change in the Label Master, all screens and reports in the system will show the label of Branch.

Screen Layout

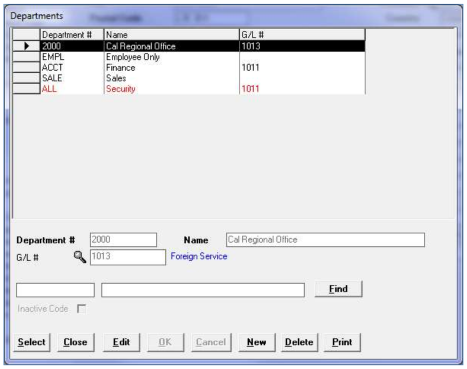


- For info:HR, the *Label Language* must always be "EN". If the information is also used in ESS, a *Label Language* of "FR" is used for the Canadian-French translations.
- To change a label click in the text box, delete the old label and enter the new label. Click the **Save** button.

Table Lookups

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

Screen Layout



- To create a new code select **New.**
- Enter in the **Code** and the **Description.**
- Select **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 has been used in the past; the history is maintained in the data base.
- Some codes have other options that are maintainable on this screen too. For example, the Attendance Code lookup has “Seniority”, Incentive”, “Emergency Flag”, etc settings that are maintained in 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; 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 record.
Delete	To delete a code.
Print	Will print a list of all codes displayed in the table.

Getting Started

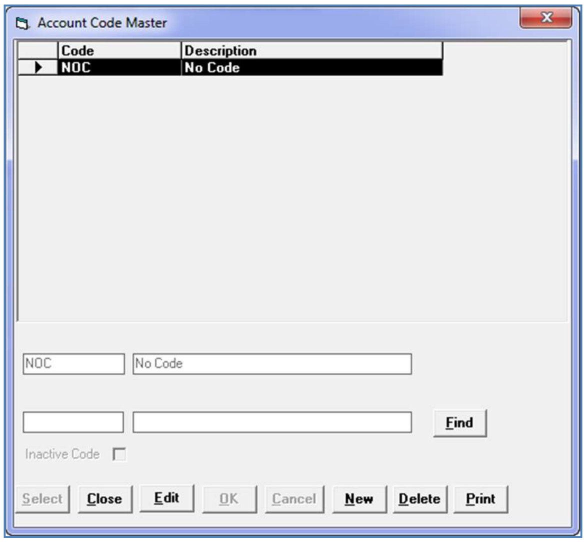
Initial Login Screen

- To log in to info:HR enter your **User ID** and your **Password.**

Account Code Master

Account Code Master is used to link codes to various account codes. In this Master screen, you can create and maintain all the codes. This table is used for logging hours against a code in our Timesheets module.

Screen Layout



- To create a new code select **New.**
- Enter in the Code and the Description.
- Select **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 has been used in the past; the history is maintained in the data base.

Buttons

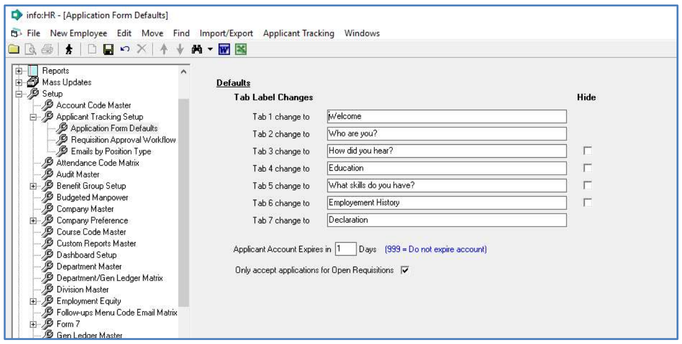
Button	Purpose
Select	Once a code is highlighted, it can either be double clicked on, or click on the **Select** button to choose the code.
Close	Closes the coding table.
Edit	To edit a description of a code; the Code itself cannot be changed.
OK	When an edit is made select OK to save the changes.
Cancel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

Applicant Tracking Setup

Application Form Defaults

This screen provides the ability to change the Tab Labels on the Applicant Tracking Web form, set Applicant Account expiry and set whether applicants can apply only for open requisitions.

Screen Layout



To change a Tab Label simply type the desired heading in the white field and click the save button.

To hide a tab in the application form check the Hide checkbox; this can only be done for tabs 3 through 6.

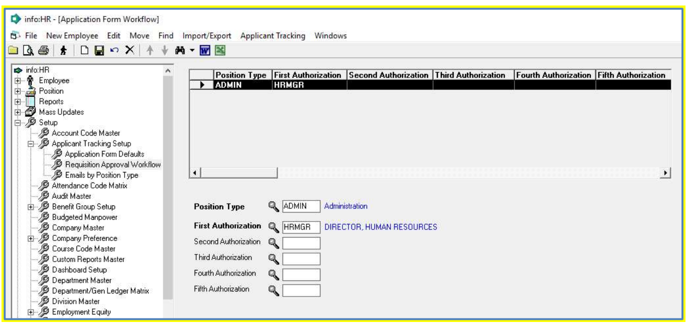
Field	Purpose
Tab 1 change to	This tab contains the open requisitions or list of positions in the organization.
Tab 2 change to	This tab contains the applicant's personal information.
Tab 3 change to	This tab contains source of posting sources.
Tab 4 change to	This tab contains the applicant's education information.
Tab 5 change to	This tab contains the applicant's skill information.
Tab 6 change to	This tab contains the applicant's employment history and document attachments. Do not hide this tab if resume submission is required.
Tab 7 change to	This tab contains the organization declaration of honesty.

Applicant Account expires in provides the ability to remove applicants' login accounts from the system. The application information will remain it the system. The login accounts the applicants created will be deleted after the specified number of days.

If you check the ***Only accept applications for open requisitions*** check box the web form will display only positions with an open requisition. If the check box is unchecked the web form will display two dropdowns: one for all positions in the position master and one for positions with an open requisition.

Requisition Approval Workflow

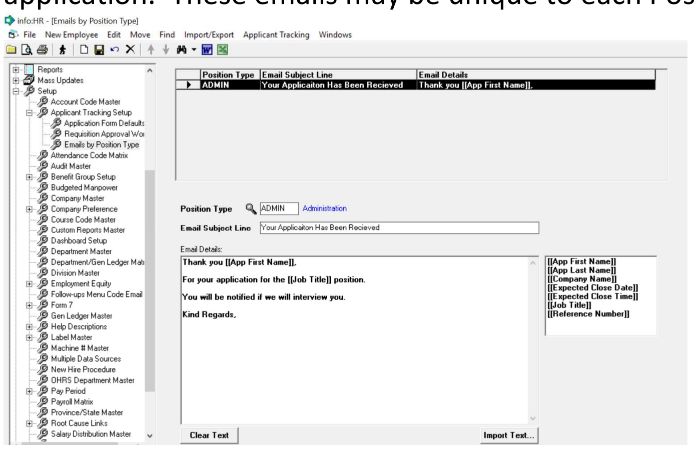
This screen provides the ability for users to set up an approval workflow for Job Requisition requests and approvals in the Employee/Manager Self Service module. Based on Position Type the user is able to define an approval flow by position.



Prior to completing this screen, each Position must be assigned a **Position Type** code in the Position Master.

Emails by Position Type

This screen allows the user to set up a standard email to be sent upon receipt of an application. These emails may be unique to each Position Type.



- To create an email click the New Record button.

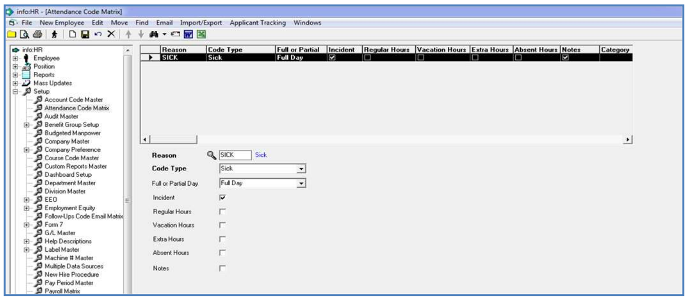
- Assign a Position Type code, enter a subject line and complete the body of the email in the Email Details box.
- To use the Merge fields: place the cursor where you would like to enter the field and double click on the desired field.

Button	Purpose
Clear Text	Provides the ability to delete text with one click.
Import Text	Provides the ability to import text from a text (.txt) document.

Attendance Code Matrix

This matrix allows you to categorize different types of Attendance Reason Codes. These categories are used only by clients who had HRSS develop customized Attendance Management Reports. Check boxes within the matrix change based on the client requirements. Unless you have these reports, this matrix does not need to be created.

Screen Layout



- To enter a new Attendance Code, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Reason	Enter the Reason or click on the magnify glass to select the code from the lookup.
Code Type	Enter the Type or click on the down arrow to select the code from the dropdown.
Full or Partial Day	Provides the ability to select a Full or Partial Day from the dropdown.
Incident	Identifies Reason codes that are counted towards incident analysis.
Regular Hours	Identifies Reason codes that are counted towards regular hours.
Vacation Hours	Identifies Reason codes that are counted towards vacation hours.
Extra Hours	Identifies Reason codes that are counted towards extra hours.
Absent Hours	Identifies Reason codes that are counted towards absent hours.
Notes	Enter as needed.

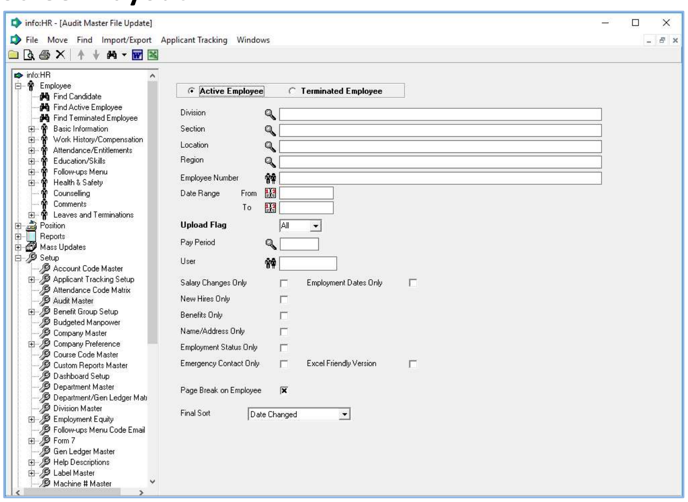
Audit Master

info:HR creates an audit record for every employee transaction entered into the system. There is a twofold purpose:

- To provide the organization with an audit trail of employee maintenance. For every payroll/benefit transaction entered, the audit trail records the change, the employee number of the person who entered the change, and the date/time of the change.
- To create a file of information to be exported to third party software, payroll for example. Refer to the documentation for your specific interface to determine when and under what conditions you will run the *Audit Master* report.

This function gives you the ability to *View, Print*, and/or *Delete* the audit trail. This function should be performed at least once per year and, if your database is large, quarterly. Unless your organization's policy states that you require a paper copy of the audit trail, delete the *Audit Master* without printing its contents.

Screen Layout



- Click the **View** ( ) icon to view the report.
- Click the **Print** ( ) icon to print the report.
- Click the **Delete** ( ) icon to empty the contents of the Audit Master. Caution is advised when selecting this option. As a general house-keeping task, the Audit Master should be cleared on a minimum annual basis. This file can become very large.

Selection Criteria

Field	Purpose
Active Employee/Terminated Employees	Click on the type of employee that you want to lookup. Table code lookups for **Division**, **Section**, **Location**, **Region** and **Pay Period** are available by either entering a valid code or selecting one or more code by clicking on the magnify glass.
Employee Number	Enter the Employee Number or use the lookup to select the Employee. If using the

Field	Purpose
Employee Number Continued	lookup, make sure that **Active Employee / Terminated Employee** is properly select in order to view the correct list of employees.
Date Range	Provides the ability to select a Date Range.
Upload Flag	Yes shows/deletes only transactions that were uploaded to payroll. No shows/deletes only transactions not uploaded to payroll and All shows/deletes all transactions.
User	Provides the ability to select a system User. This option would display/delete Audit records that were added or maintained by a specific user. Check boxes include: **Salary Changes Only** – Provides the ability to select Salary Changes Only. **New Hires Only** – Provides the ability to select New Hires only. **Benefits Only** – Provides the ability to select Benefits changes only. **Name/Address Only** – Provides the ability to select Name/Address changes only. **Employment Status Only** – Provides the ability to select Employment Status changes only. **Page Break on Employee** – Provides the ability to insert a page break between each employee.
Final Sort	Provides the ability to select the order the information is to be viewed.

Report Sample

Time: 9:05:18 AM AUDIT MASTER FILE REPORT RZAUDIT

Employee: 1050 Armstrong-Smith, Grant

Trans.	Data Being Updated	New Data	Previous Data	By Whom	Upload	Date of Change
A	Position Code	CIO		999999999	Y	4/01/00
A	Job Starting Date	4/01/00		999999999	Y	4/01/00
A	Division Number	2000		999999999	Y	4/01/00
A	Position Change Reason	PROM		999999999	Y	4/01/00

Trans. Legend:

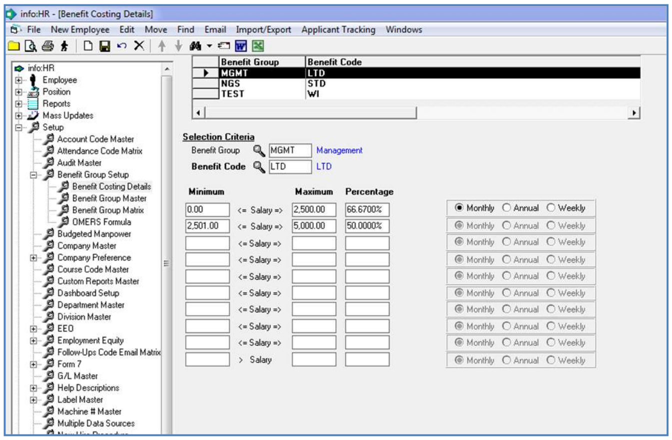
A – Add a new record (includes New Hires)
M – Modification to existing information
D – Delete information
T - Terminations

Benefit Group Setup

Benefit Costing Details

This screen allows you to define benefit costs that have a multi-tiered coverage calculation based on a salary-dependent benefit code. Many LTD pension plans are examples of multi-tiered, salary-dependent benefits.

Screen Layout



- To enter a new benefit record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Benefit Group	Enter the Benefit Group or click on the magnify glass to select the code from the lookup. This is not mandatory field. If it is blank, the costing calculation will be applicable for all groups.
Benefit Code	Enter the Benefit Code or click on the magnify glass to select the code from the lookup.
Minimum	Provides the ability to set a Minimum Salary Level.
Maximum	Provides the ability to set a Maximum Salary Level.
Percentage	Provides the ability to enter a Percentage.
Monthly/Annual	Provides a flag setting to identify whether the Coverage Amount should be calculated based on an monthly or annual amount. If the cost of the benefit is entered as a monthly cost on the Benefit Group Master screen, select the *Monthly* option. Otherwise, select the *Annual* option

Buttons

Button	Purpose
Print All	Provides the ability to print all Benefit Groups.

Coverage/Cost Calculation:

Based on the example shown in the screen layout above, the calculation for will be:

Employee #1053 (Jane Doe)
Annual Salary is $58,200.00
Monthly Salary is $4850.
Rounding Factor is 1.
Next/Nearest is Next.
Cost of the benefit is $1.50 per $100 of coverage.

Benefit Coverage Amount:

Step 1: $2,500.00 * 66.7% equals $1,667.50
+ $2,350.00 * 50% equals $1,175
= $2,842.50 (Coverage Amount before comparing to the Benefit rule)

Step 2: Does the Benefit have a Maximum Coverage Amount?
If yes:
If result of step 1 is greater than the Maximum Coverage Amount, the employee's Coverage Amount will equal the Maximum Coverage.
If the result from step 1 is not greater than the Maximum Coverage Amount, apply the Rounding Factor and Next/Nearest option to the result of step 1.
If no:
Apply the Rounding Factor and Next/Nearest option to the result of step 1.

Result: Benefit Coverage Amount = $2,842.50

Total Cost Calculation:

Formula: 12*([Coverage Amount] * [Unit Cost]/[Per])

Values: 12*($2,842.50*1.50/100)

Result: $511.65 annual cost / $42.64 monthly cost.

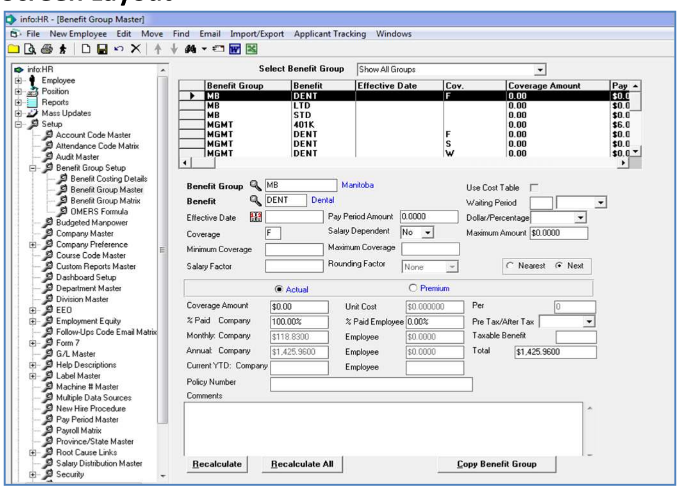
Benefit Group Master

The Benefit Group Master stores all the policy information for a specific group of benefits. For example, there may be a group of benefits for salaried employees that is different from the group of benefits provided for employees covered by the collective agreement.

info:HR supports an unlimited number of Benefit Groups. Furthermore, each Benefit Group can contain an unlimited number of Benefit records.

Use this function to add one record for every Benefit that the Benefit Group contains. *info:HR* allows you to make across-the-board (mass) changes to the *Benefits* for all employees or a group of employees.

Screen Layout



- To enter a new Benefit Group record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.
- To view only a specific Benefit Group, click on the **Select Benefit Group** down arrow and pick the group you wish to view.

Information Validation

Field	Purpose
Benefit Group	Enter the Benefit Group or click on the magnify glass to select the code from the lookup.
Benefit Code	Enter the Benefit Code or click on the magnify glass to select the code from the lookup.
Use Cost Table	This flag will be automatically checked if the application finds a Benefit Group Costing record for the Benefit Code entered.

Field	Purpose
Waiting Period **Waiting Period Continued**	If the employee must wait a certain period of time prior to being eligible for the benefit, enter the value and time frame from the select list. The application will calculate the Benefit's Effective Date but adding the Waiting Period to the employee's Date of Hire.
Effective Date	Normally, this is left blank. If completed, the Benefit Effective Date will be updated to a specific date based and not use the Waiting Period.
Pay Period Amount	Enter the pay period cost amount. For some payroll/insurance carrier interfaces, this amount is automatically calculated.
Dollar/Percentage	Select the denominator that refers to the Pay Period Amount.
Coverage	Defines type of coverage. For example: F for family and S for single.
Salary Dependant	Select from the dropdown list. If "Yes" is selected, Minimum Coverage, Maximum Coverage, Salary Factor, Rounding Factor, Nearest/Next, Actual/Premium, Unit Cost and Per are used to calculate the cost of the benefit. Whenever there is a change in the employee's salary, the application will recalculate the total cost of all benefits flagged as "salary-dependent".
Maximum Amount	Enter the Maximum Annual Amount that can be deducted from an Employee's pay. Typical use of this field is for bonds or loan repayments offered by the organization.
Minimum Coverage	Enter, if needed, the minimum coverage of a salary-dependent benefit.
Maximum Coverage	Enter, if needed, the maximum coverage of a salary-dependent benefit.
Salary Factor	Enter the factor to be used to multiply the employee's current salary.

Field	Purpose
	For example, life insurance coverage may be two times an employee's salary.
Rounding Factor **Rounding Factor**	If Salary Factor is used, this must be entered. The rounding factor is used after the salary factor is applied to the employee.
Nearest/Next	If Salary Factor is used, this must be entered. The nearest/next is used after the rounding factor is applied to the employee. For example: Life is 2x the annual salary rounded to the next $1,000. If an employee makes $43,250 per year, their Life Coverage would be $87,000.
Actual/Premium	Click on Actual if the Total Cost is based on a flat fee. If based on an employee's system-generated Coverage Amount, use Premium.
Coverage Amount	Leave blank for salary-dependent benefits.
Unit Cost	If Premium is used, this must be completed.
Per	If Premium is used, this must be completed.
% Paid - Company	Enter the percentage of cost covered by the company.
% Paid Employee	Enter the percentage of cost covered by the employee. For RSP-type contributions that are matched by the organization, both percentages should say 100%.
Pre Tax/After Tax	Used by US payroll systems only.
Monthly Company	System-calculated based on the Total Cost and split percentages.
Monthly Employee	System-calculated based on the Total Cost and split percentages.
Taxable Benefit	Enter "Y" if the benefit is a taxable benefit.
Annual Company	System-calculated based on the Total Cost and split percentages.

Field	Purpose
Annual Employee	System-calculated based on the Total Cost and split percentages.
Total	Enter this cost only on Benefits identified as “Actual”.
Current YTD Company	Not used.
Current YTD Employee	Not used.
Policy Number	Enter, if needed, group policy number.
Comments	Enter, if needed, comments related to this benefit.

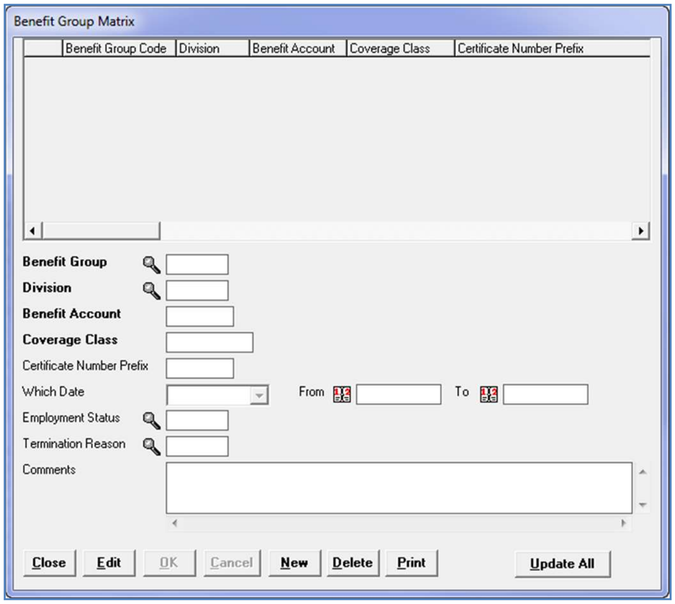
Buttons

Button	Purpose
Recalculate	Recalculates the cost of the benefit highlighted.
Recalculate All	Recalculates the cost of all benefits.
Copy Benefit Group	Copies the details from one Benefit Group to another.

Benefit Group Matrix

This matrix is only used for certain insurance carrier interfaces and does not need to be completed unless the client has such an interface.

Screen Layout



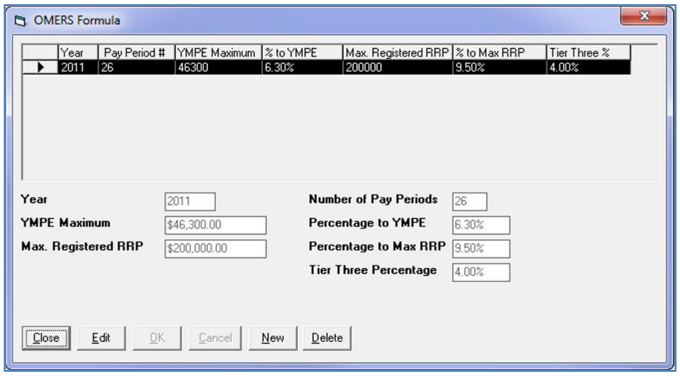
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details in the matrix
OK	When an edit is made select OK to save the changes.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a record.
Print	Will print a list of matrix items displayed in the table.
Update All	Applies the matrix to the employees affected.

OMERS Formula

This function is used only by organizations that have enrolled in the OMERS pension system. The information contained in the screen is used to calculate the company's and employee's OMERS contributions.

Screen Layout



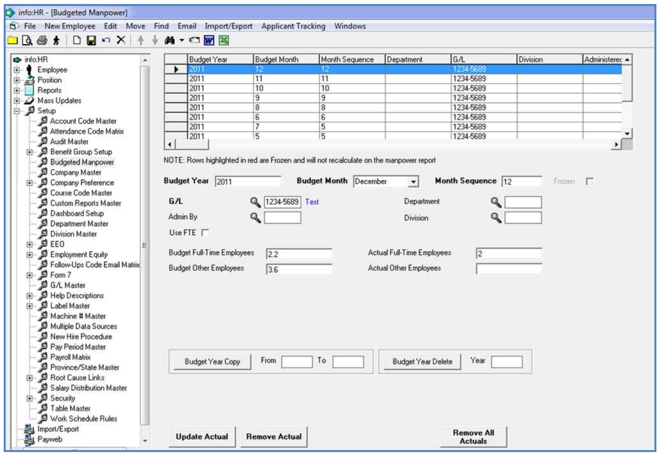
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details in the matrix
OK	When an edit is made select OK to save the changes.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a record.
Print	Will print a list of matrix items displayed in the table.

Budgeted Manpower

The Budgeted Manpower setup is used to define the number of budgeted employees vs. the number of actual employees. Budget numbers need to be set up for each month in the budget year. A further breakdown of GL/Department/Division/Admin By is available too. The Manpower Plan Report uses this information.

Screen Layout



Information Validation

Field	Purpose
Budget Year	Enter the Budget Year.
Budget Month	Enter the Budget Month.
Month Sequence	This is used by the report to sort the no9mths in the correct budget order and not alphabetically by Budget Month.
Frozen	Flag identifying that the Year/Month no longer can be changed.
GL	Enter the GL or click on the magnify glass to select the code from the lookup.
Department	Enter the Department or click the magnify glass to select the code from the look up.
Admin By	Enter the Admin By or click the magnify glass to select the code from the lookup.
Division	Enter the Division or click on the magnify glass to select the code from the lookup.
Use FTE	Identifies whether FTEs should be used in the calculation.
Budget Full Time Employees	Enter the budgeted full time employees for this group.
Actual Full Time Employees	System calculated after pressing the Update Actual button.
Budget Other Employees	Enter the budgeted non-full time employees for this group.
Actual Other Employees	System calculated after pressing the Update Actual button.

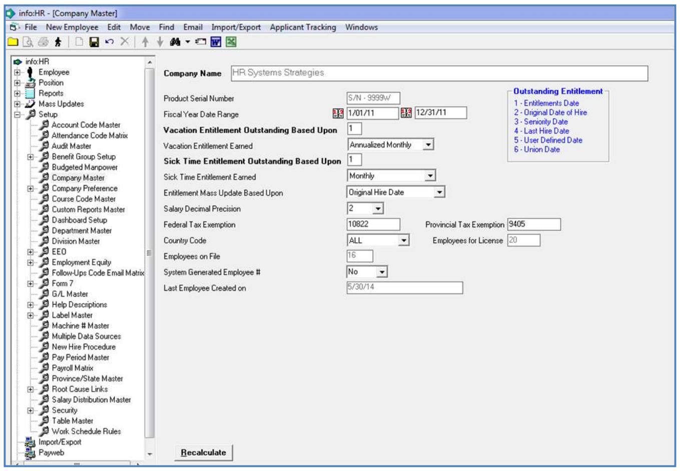
Buttons

Button	Purpose
Budget Year Copy	Copies all months from one budget year to the next.
Budget Year Delete	Deletes all months in a budget year
Update Actual	Updates the current Month's actual and freezes the month.
Remove Actual	Removes actuals from a frozen month (frozen flag is unchecked).
Remove All Actuals	Removes all actual from all months.

Company Master

The Company Master stores information regarding your info:HR installation, such as Serial Number of your product, the number of employees your organization is licensed for, the current number of employees on file and the date of the last new hire. All of this information cannot be altered. This screen also sets the background for the calculation of Vacation and Sick Entitlements.

Screen Layout



Fiscal Year Date Range – Provides the ability to enter your organization's Fiscal Year. This field does not have an impact on other date settings in the system.
Vacation Entitlement Outstanding Based Upon – From Outstanding Entitlement Legend in the top right of the screen select the date on the Status/Dates screen you will use to calculate Outstanding Vacation Entitlement.
Vacation Entitlement Earned – Select from the dropdown Monthly, Annual, or Annualized Monthly.

- **Monthly** means that you will apply the rule once a month. The accrual table is updated showing the rule has been applied. The monthly entitlement is ADDED to the Current Year's Entitlement. For example, John Abbott's current year is 24. The rule gives him 8 hours. After the rule has been applied, John Abbott's current year will be 32.
- **Annual** means that the user will apply the rule once a year. The accrual table is updated showing the rule has been applied. The annual entitlement REPLACES the Current Year's Entitlement. For example, John Abbott's current year is 120. The rule gives him 120 hours. After the rule is applied, John Abbott's current year will be 120 (last year's 120 replaced with this year's 120).
- **Annualized Monthly** means that the user will apply the rule once a year. The accrual table is updated showing the rule has been applied. This setting causes 12 records to be created in the Accrual table, one record for each month. The monthly entitlement is ADDED to the Current Year's Entitlement. For example, John Abbott's current year is 0. The rule gives him 8 hours per month. After the rule is applied, John Abbott's current year will be 96. If John's entitlement increases to 10 hours per month half way through the year, his current year would be 108 (8 hours * 6 months plus 10 hours * 6 months).

- **Daily** means that the user will update the rule, applying the rule once a year. The accrual table is updated, showing the rule has been applied. This setting causes 365 records to be created in the Accrual table, one record for each day. The daily entitlement is ADDED automatically to the Current Year's Entitlement on a daily basis throughout the year.

Sick Time Entitlement Outstanding Based Upon - From Outstanding Entitlement Legend in the top right of the screen select the date on the Status/Dates screen you will use to calculate Outstanding Sick Entitlement.

Sick Time Entitlement Earned - Select from the dropdown Monthly, Annual, or Annualized Monthly.

Entitlement Mass Update Based Upon – Select from the dropdown the date you would like the Mass Update of Entitlements base upon.

Salary Decimal Precision – Select from the dropdown the number of decimal places the Salary will hold.

Federal Tax Exemption – Enter the Federal Tax Exemption amount. This will automatically populate the banking screen of a new hire. This setting is only used for Canadian clients.

Provincial Tax Exemption – Enter the Provincial Exemption amount. This will automatically populate the banking screen of a new hire. This setting is only used for Canadian clients who have operations in one Province.

Country Code – Default Country code selected from the dropdown.

Employees for Licence – Displays the number of employees the software is licensed for. When the Employees on File matches the Employees for License, the info:HR Support Department needs to be contacted to upgrade your license limit.

Employees on File – Displays the number of active employees in the system.

System Generated Employee # - Select from the dropdown "yes" if you would like the system to generate employee #'s, "no" if you would like to enter your own sequence.

Last Employee Created on – Displays the date of the last new hire.

Buttons

Recalculate – Provides the ability to recalculate all employees' outstanding entitlements, emergency leaves taken and hours per day.

***Note: Only use this button when both Vacation Entitlement Outstanding and Sick Time Entitlement Based Upon is equal to 1.*

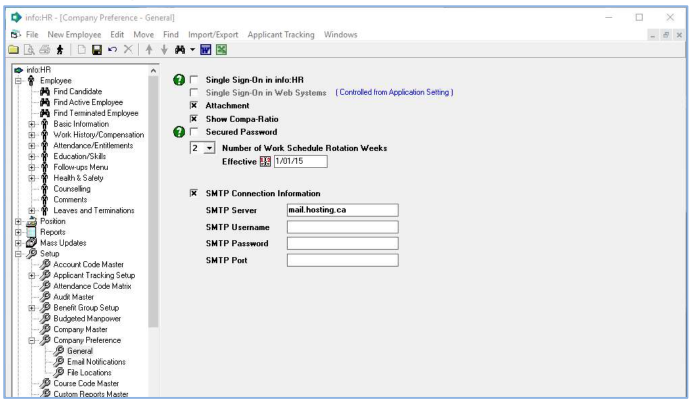
Company Preferences

Company Preferences are global settings used throughout the application. These settings include:

1. Single sign-on
2. Document attachments
3. Email notifications
4. Alternate file locations
5. Other miscellaneous functions

General

Screen Layout



Single Sign-On in info:HR – Check this box to enable single sign-on of the client-server application. The info:HR User IDs must match exactly the network login IDs in order for this to work.
Single Sign-On in Web Systems – Disabled, superseded by the "IHRSSO Setup Instructions" document in the "_Install Instructions" folder for the web modules for detailed instructions.
Attachment – When checked, provides the ability to utilize the import buttons on various screens in info:HR.
Show Compa-Ratio – When checked, the Compa Ratio value will be displayed on each employee's Salary Screen.
Secured Password – When checked, the application requires employees to follow specific rules when setting up passwords. Note: To view the rules, click on the green question mark. ( )
Number of Work Schedule Rotation Weeks – Dropdown containing 1 – 4. This is used when Attendance Work Schedule is activated in the system.

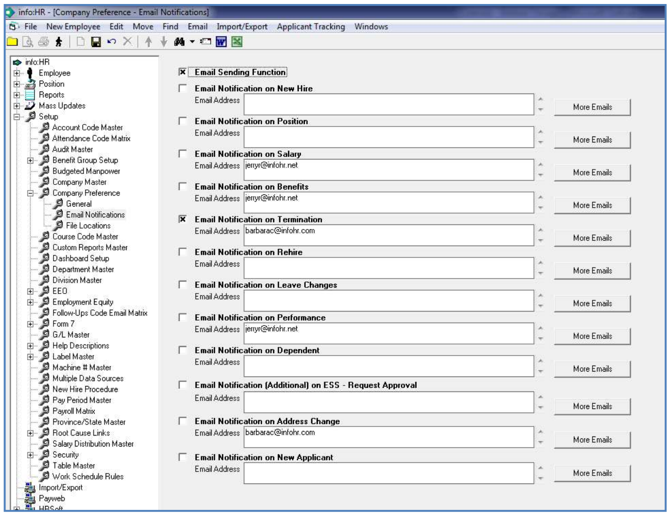
Note: Work Schedule rotation is set by default with 1 week rotation.

Effective – Represents the date when the Work Schedule Rotation begins.

SMTP Connection Information – When checked provides the ability to enter your Exchange Server information to assist in Email Setup for use of ESS.
SMTP Server (Required) – This field provides the ability to enter your Exchange server address.
SMTP Username (Not Required) – Only used if required by your Exchange server.
SMTP Password (Not Required) – Only used if required by your Exchange server.
SMTP Port (Not Required) – Only used if required by your Exchange server.

Email Notifications

Screen Layout

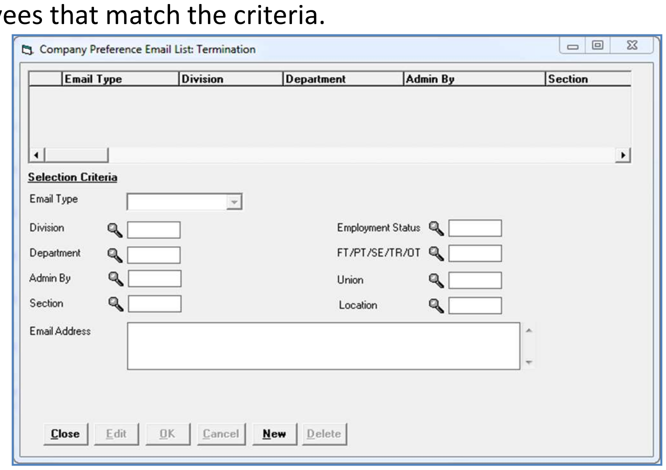


Email Sending Function – When checked, provides the ability to send automatic emails in the system.

Email Notification on… – When checked for various functions, enables the system to send emails when the function is performed. For example: if the Email Notification on New Hire is checked, when a user completes a new hire the system will send an email notification to each email listed in the Email Address box. Multiple email addresses are separated by a semi-colon, ";", with no intervening spaces.

Buttons

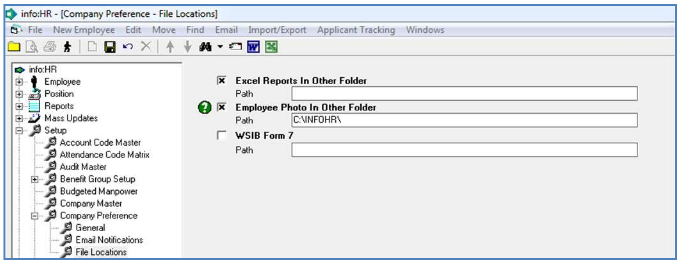
More Emails – Provides the ability to set selection criteria to direct emails to groups of employees that match the criteria.



File Location

This section provides the ability to store information in other designated folders on the server, rather than the standard info:HR folder.

Screen Layout



Excel Reports In Other Folders – Enter the full path where Excel reports should be saved. If not completed, the application stores the Excel reports in the default “IHRReports” folder defined during the client installation.

Employee Photo in Other Folder –When a new version of info:HR is installed, if the employee photos are moved from the database to a file folder, this option contains the drive/folder where the info:HR photos now reside.

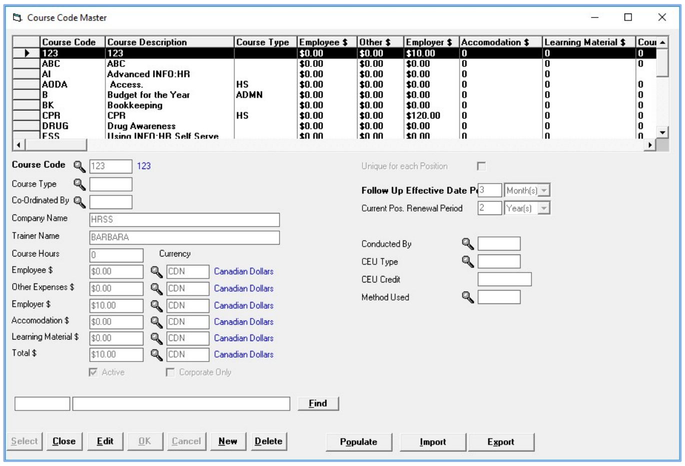
> ***Note**:* If you are using ESS or Timesheets, the employee photos should remain in the info:HR database.

WSIB Form 7 – This is only needed if you have purchased the Form 7 generator module and works similar to the above, to indicate where the generated Form 7/9 PDF file will be stored.

Course Code Master

The Course Code master is used set up default information on Course Codes. If the Follow-Up Effective Date Period and the Current Pos. Renewal Period are completed, a Training Plan is built for employees who have Required Courses assigned to their Position, and the system will automatically create follow-ups for the course renewal.

Screen Layout



Information Validation

Field	Purpose
Course Code	Enter the Course Code or click on the magnify glass to select the code from the lookup.
Course Type	Enter the Course Type or click on the magnify glass to select the code from the lookup.
Coordinated By	Enter the Coordinated By or click on the magnify glass to select the code from the lookup.
Company Name	Provides the ability to enter a Company Name of the course provider.
Trainer Name	Provides the ability to enter the Trainer's Name.
Course Hours	Provides the ability to enter the hours required to complete the course.
Employee $	Provides the ability to enter the dollar amount the employee is responsible for.
Other Expenses $	Provides the ability to enter other expenses incurred for the course.
Employer $	Provides the ability to enter the dollar amount the employer is responsible for.
Accommodation $	Provides the ability to enter the dollar amount associated with accommodations for the course.

Field	Purpose
Learning Material $	Provides the ability to enter the cost of the learning materials.
Total $	Provides the total of all expenses associated with the course. This dollar value is calculated by summing the above costs.
Follow Up Effective Date Period	Provides the ability to enter a time frame in which the employee must complete the course after being assigned to the position.
Current Pos. Renewal Period	Provides the ability to enter a renewal period for the course. **Note:** If Follow up Effective Date Period and Current Pos. Renewal Period are entered the system will automatically create follow-ups for the course.
Conducted By	Provides the ability to enter the training provider code.
CEU Type	Provides the ability to enter a CEU Type code.
Method Used	Provides the ability to enter a Method Used code.

Buttons

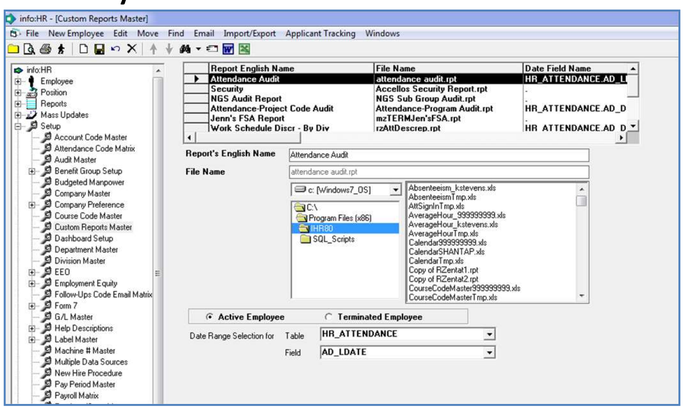
Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Populate	Populates the Course Code Master using the Course Code table entries.
Import	Imports the Course Code Master from an Excel Spreadsheet. Contact info:HR support for more details.
Export	Exports the Course Code Master to an Excel spreadsheet.

Custom Reports Master

This function is used by info:HR to identify user-created reports. Reports must be written using Crystal Reports Version 8.0 and the Crystal Report file must be located in the same folder as the info:HR reports.

Once the report is saved, the user must be assigned security rights to run the report. This is found under Security Master / Custom Reports that is defined later in this document.

Screen Layout



- To enter a new report, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

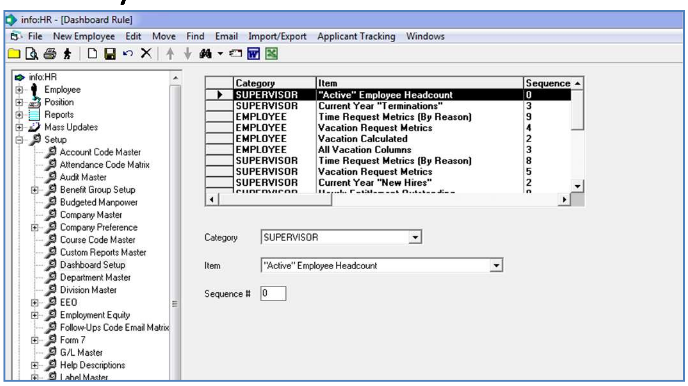
Field	Purpose
Report's English Name	Type in the report name as it will be known to other users.
File Name	Select the ad-hoc report from the dropdown list provided below. The path should be displaying the info:HR Reports path.
Active/Terminated	This is used during the Employee Look-Up. Based upon the button selected, the appropriate Find Employee will pop up.
Date Range Selection: Table	If the report wants to use a date range as part of its Selection Criteria, choose the info:HR table from the dropdown list.
Date Range Selection: Field	If the report wants to use a date range as part of its Selection Criteria, choose the info:HR field from the dropdown list.

Dashboard Setup

This section is use to set up the Dashboard in ESS by selecting items to be displayed and the order in which employees will view each item on the Dashboard. Dashboard items are categorized as “Employee” vs. “Supervisor”. Default lists of Dashboard items are provided.

Supervisors are identified as any login user who is identified as a Supervisor under Security / Email Setup. Supervisors will view both Employee and Supervisor Dashboard items.

Screen Layout



- To enter a new item, click the new record icon button. This icon is available but should not be used unless instructed to by info:HR Support.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

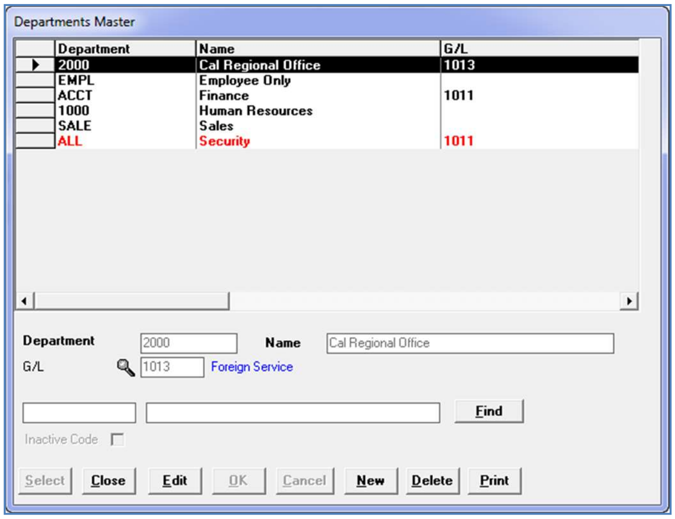
How to use this screen:

1. Click on the column header **Category**. This will group Supervisor and Employee Dashboard items together.
2. For each Category/Dashboard item, assign a **Sequence** number. When displaying the Dashboard in ESS, the Dashboard items will display in Sequence number order. If the Dashboard item’s Sequence number is duplicated, ESS displays the items alphabetically. Hint: Use sequence numbers of 10, 20, 30… rather than 1, 2, 3… to simplify resequencing.

Department Master

Use this function to maintain Department Codes and Descriptions. For each Department, an associated *General Ledger* code can be entered. When assigning the Department to an employee, the application with use the default GL Code. This code can be overwritten by the user.

Screen Layout

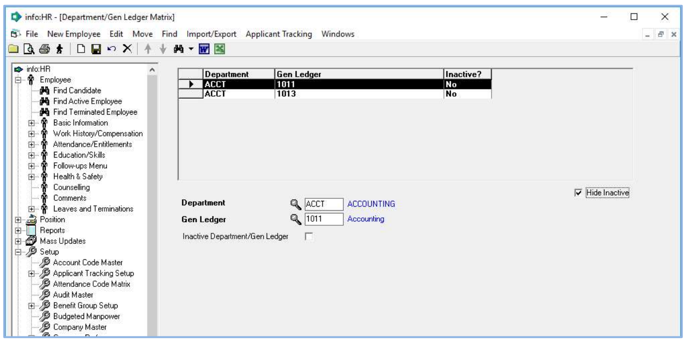


Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Find	Provides the ability to search based on either Department Code or Description.

Department/General Ledger Matrix

This screen provides the ability to associate a General Ledger Code with a Department Code. This feature is used only by certain clients that require the correct combination of Department and GL and is used by some payroll system interfaces.



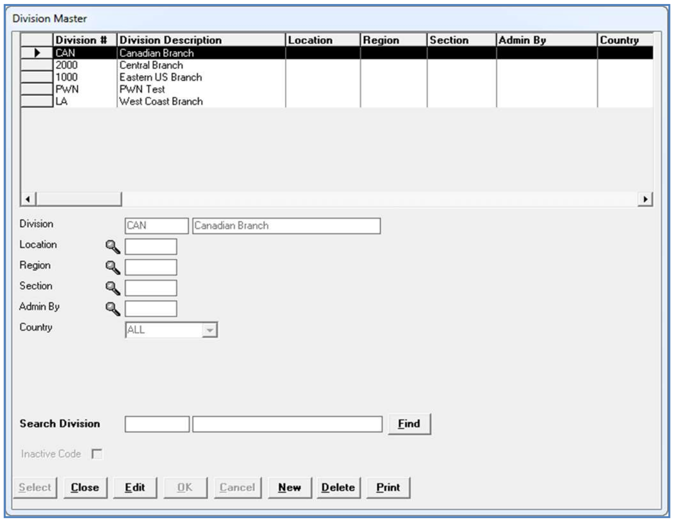
Information Validation

Field	Purpose
Department	Provides the ability to enter a Department Code.
Gen. Ledger	Provides the ability to enter a General Ledger Code.
Inactive Department/Gen Ledger	Provides the ability to mark Departments as inactive.
Hide Inactive	Provides the ability to hide inactive Department Codes.

Division Master

Use this function to maintain Division Codes and Descriptions.

Screen Layout



Buttons

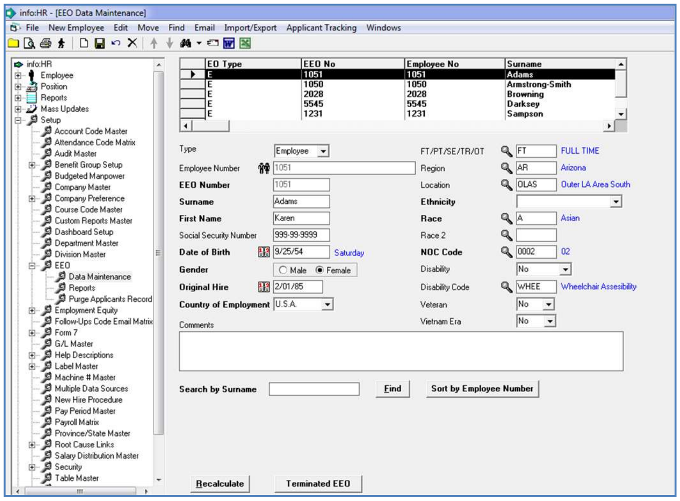
Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Find	Provides the ability to search based on either Division Code or Division Description.

EEO

Data Maintenance

This screen is used to track employment equity data for reporting to the US government.

Screen Layout



- To enter a new item, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Purpose
Type	Select either Applicant or Employee.
Employee Number	Enter an Employee Number or click on the icon to select the Employee from the lookup.
EEO Number	A unique number that assigned to the employee or applicant. It may be a different number than the employee number. If left blank, the employee number is defaulted.
Surname	Defaults from the Employee Master. Can be overridden.
First Name	Defaults from the Employee Master. Can be overridden.
Social Security No.	Defaults from the Employee Master. Can be overridden.
Date of Birth	Defaults from the Employee Master. Can be overridden.
Gender	Defaults from the Employee Master. Can be overridden.
Original Hire	Defaults from the Employee Master. Can be overridden.

Field	Purpose
Country of Employment	Defaults from the Employee Master. Can be overridden.
Category	Defaults from the Employee Master. Can be overridden.
Region	Defaults from the Employee Master. Can be overridden.
Location	Defaults from the Employee Master. Can be overridden.
EEO Race	Enter the Race or click on the magnify glass to select the code from the lookup.
NOC Code	Defaults from the employee's Position Master. Can be overridden.
Disability	Select Yes or No
Disability Code	Enter the Disability or click on the magnify glass to select the code from the lookup.
Veteran	Select Yes or No.
Vietnam Era	Select Yes or No.
Comments	Provides the ability to enter comments.

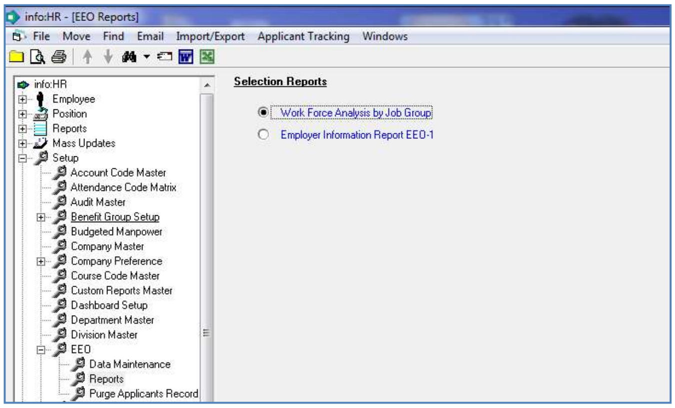
Buttons

Button	Purpose
Recalculate	Re-Updates the employee's demographic and NOC Code information based upon where the employee resides.
Terminated EEO	Click for Terminated employee EEO.

Reports

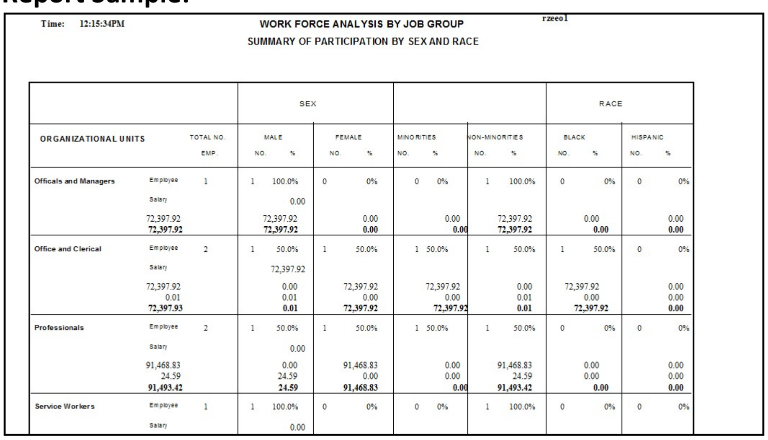
Work Force Analysis by Job Group

Screen Layout



- No selection criteria are available for this report. The report totals and groups the EEO data into the format below.

Report Sample:



Time: 12:15:34PM rzeeo1

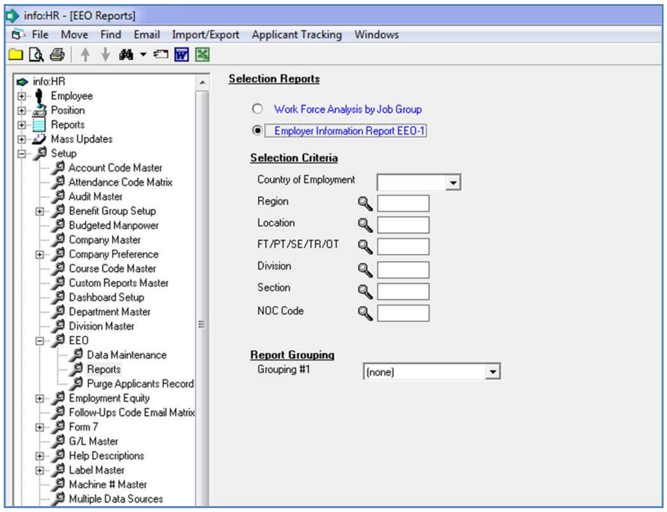
WORK FORCE ANALYSIS BY JOB GROUP

SUMMARY OF PARTICIPATION BY SEX AND RACE

			SEX								RACE			
ORGANIZATIONAL UNITS		TOTAL NO. EMP.	MALE NO.	%	FEMALE NO.	%	MINORITIES NO.	%	NON-MINORITIES NO.	%	BLACK NO.	%	HISPANIC NO.	%
Officals and Managers	Employee	1	1	100.0%	0	0%	0	0%	1	100.0%	0	0%	0	0%
	Salary			0.00										
	72,397.92			72,397.92		0.00		0.00		72,397.92		0.00		0.00
	72,397.92			**72,397.92**		**0.00**		**0.00**		**72,397.92**		**0.00**		**0.00**
Office and Clerical	Employee	2	1	50.0%	1	50.0%	1	50.0%	1	50.0%	1	50.0%	0	0%
	Salary			72,397.92										
	72,397.92			0.00		72,397.92		72,397.92		0.00		72,397.92		0.00
	0.01			0.01		0.00		0.00		0.01		0.00		0.00
	72,397.93			**0.01**		**72,397.92**		**72,397.92**		**0.01**		**72,397.92**		**0.00**
Professionals	Employee	2	1	50.0%	1	50.0%	1	50.0%	1	50.0%	0	0%	0	0%
	Salary			0.00										
	91,468.83			0.00		91,468.83		0.00		91,468.83		0.00		0.00
	24.59			24.59		0.00		0.00		24.59		0.00		0.00
	91,493.42			**24.59**		**91,468.83**		**0.00**		**91,493.42**		**0.00**		**0.00**
Service Workers	Employee	1	1	100.0%	0	0%	0	0%	1	100.0%	0	0%	0	0%
	Salary			0.00										

Employer Information Report EEO-1

Screen Layout



- The Selection Criteria provides the ability to define specific group(s) to be reported on.

Report Sample:

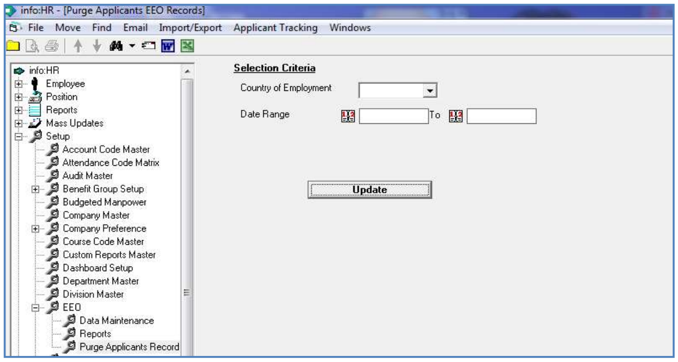
Time: 12:18:17PM — EMPLOYER INFORMATION REPORT EE0-1 — rzeeo2

JOB CATEGORIES	NUMBER OF EMPLOYEES												
		MALE						FEMALE					
	Overall Totals Sum of Col. B Thru M	White (Not of Hispanic Origin)	Black or African American (Not of Hispanic Origin)	Hispanic or Latino	Asian	Native Hawaiian or Other Pacific Islander	American Indian or Alaskan Native	White (Not of Hispanic Origin)	Black or African American (Not of Hispanic Origin)	Hispanic or Latino	Asian	Native Hawaiian or Other Pacific Islander	American Indian or Alaskan Native
	A	B	C	D	E	F	G	H	I	J	K	L	M
Officals and Managers	1	1	0	0	0	0	0	0	0	0	0	0	0
Professionals	1	0	0	0	0	0	0	0	0	0	0	0	1
Office and Clerical	2	0	0	0	0	1	0	0	1	0	0	0	0
Service Workers	1	0	0	0	1	0	0	0	0	0	0	0	0
TOTAL:	**5**	**1**	**0**	**0**	**1**	**1**	**0**	**0**	**1**	**0**	**0**	**0**	**1**

Purge Applicants Record

This section provides the ability to delete Applicant Records for a specific Country and Date Range.

Screen Layout



- Click on the **Update** button to process the deletes based upon the selection criteria entered.

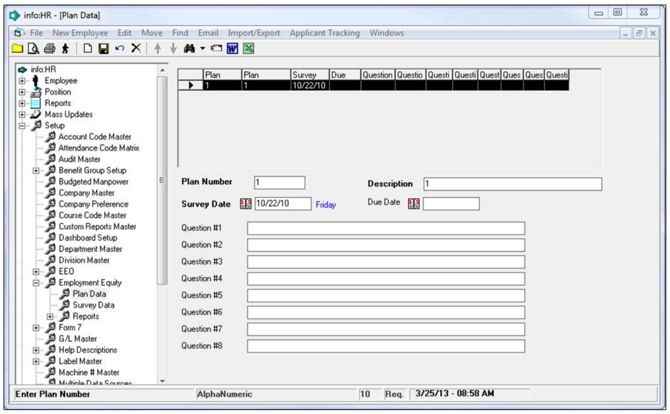
Employment Equity

Employment Equity screens/reports were built to accommodate clients who have employment equity reporting requirements to the Canadian federal government.

Plan Data

This screen enables the user to add up to eight company-based questions to the employment equity survey.

Screen Layout



- To enter a new item, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

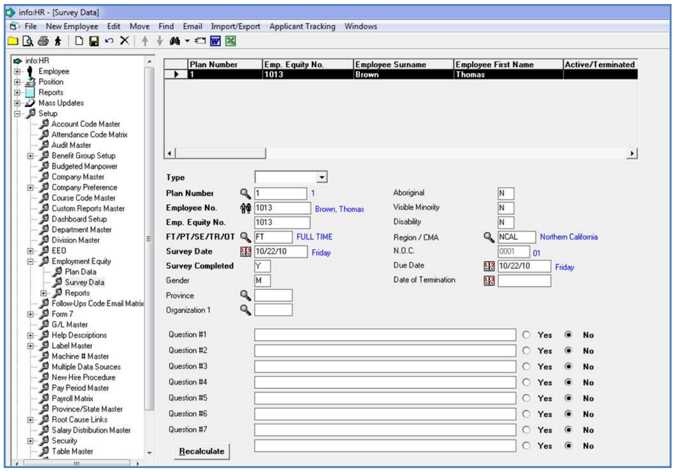
Information Validation

Field	Purpose
Plan Number	Enter a value.
Description	Enter the English Description of the Plan Number.
Survey Date	Enter the English Description of the Plan Number.
Due Date	Enter the due (completion) date of the survey.
Question #1	Optional entry. If you want the employee to answer Yes/No to a specific inquiry, enter the question here.
Question #2	Same as Question #1.
Question #3	Same as Question #1.
Question #4	Same as Question #1.
Question #5	Same as Question #1.
Question #6	Same as Question #1.
Question #7	Same as Question #1.
Question #8	Same as Question #1.

Survey Data

Use this screen to track *Employment Equity Surveys* to determine those employees who have completed the survey and those for whom the survey remains outstanding.

Screen Layout



- To enter a new item, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

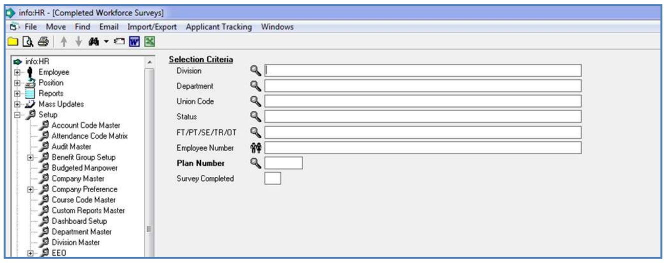
Field	Purpose
Type	Active or Terminated.
Plan Number	Enter a value or click on the lookup icon to select the Plan. The Survey Date and Due Date are populated automatically.
Employee No.	Select employee from the lookup. Once selected, press the Tab key and the Category, Gender, Region and NOC Code will display based upon the employee's current information. This information can be changed if needed.
Emp. Equity No.	Defaults to the Employee Number and can be changed if needed.
Survey Completed	Enter Y for Yes or N for No.
Aboriginal	Enter Y for Yes or N for No.
Visible Minority	Enter Y for Yes or N for No.
Disability	Enter Y for Yes or N for No.
Date of Termination	This is updated during the termination function or can be manually entered.
Question #1 thru #8	Select Yes or No.

Reports

Completed Workforce Surveys

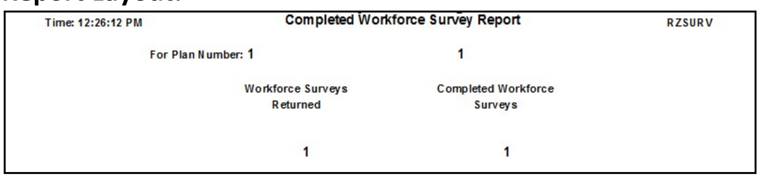
Use this report to view the number of completed surveys returned vs. completed.

Screen Layout



- Plan Number is a mandatory field.

Report Layout:


Time: 12:26:12 PM Completed Workforce Survey Report RZSURV

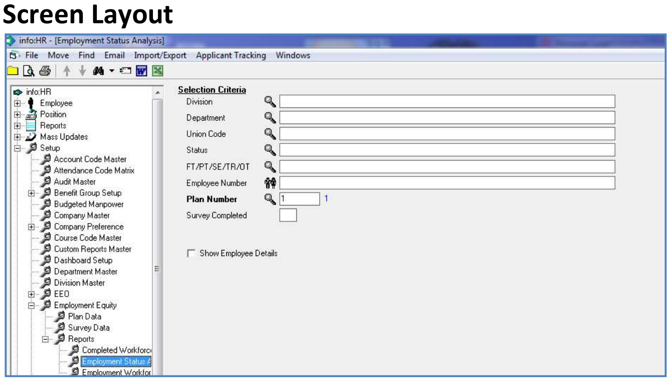
For Plan Number: 1 1

Workforce Surveys Returned	Completed Workforce Surveys
1	1

Employment Status Analysis

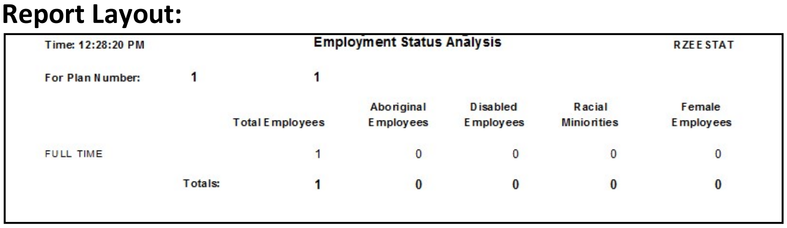
Use this function to generate a report showing the total number of employees by Employment Status broken into Aboriginal, Disabled, Racial Minorities and Female categories.

Screen Layout



- Plan Number is a mandatory field.

Report Layout:


Time: 12:28:20 PM Employment Status Analysis RZEESTAT

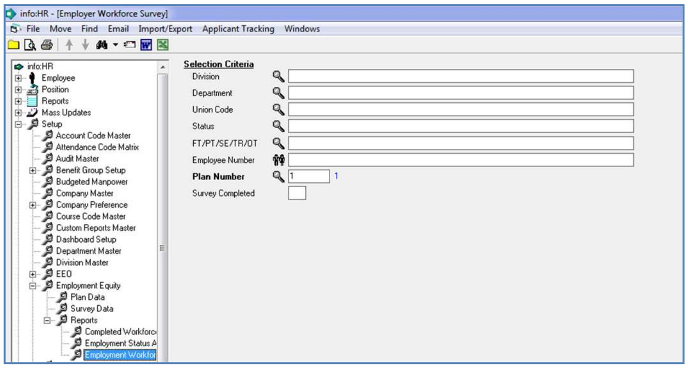
For Plan Number: 1 1

	Total Employees	Aboriginal Employees	Disabled Employees	Racial Miniorities	Female Employees
FULL TIME	1	0	0	0	0
Totals:	1	0	0	0	0

Employment Workforce Survey

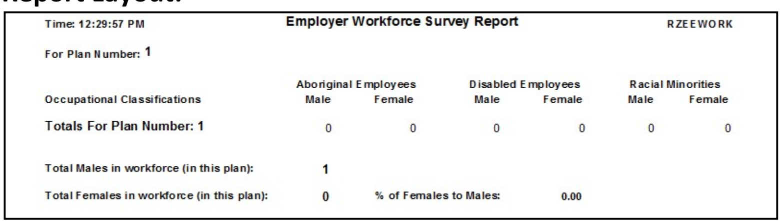
Use this report to generate a report showing the number of male and female employees in each NOC Code.

Screen Layout



- Plan Number is a mandatory field.

Report Layout:



Time: 12:29:57 PM — Employer Workforce Survey Report — RZEEWORK

For Plan Number: 1

Occupational Classifications	Aboriginal Employees Male	Aboriginal Employees Female	Disabled Employees Male	Disabled Employees Female	Racial Minorities Male	Racial Minorities Female
Totals For Plan Number: 1	0	0	0	0	0	0

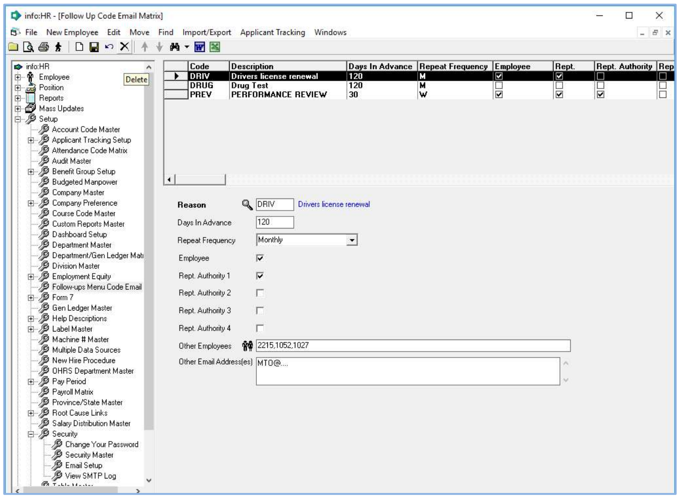
Total Males in workforce (in this plan): 1

Total Females in workforce (in this plan): 0 % of Females to Males: 0.00

Follow-ups Code Email Matrix

This screen is used to set up the email sending function on Follow-Up reason codes.
Note: A scheduled task must be set up on the server for this function to operate properly.

Screen Layout

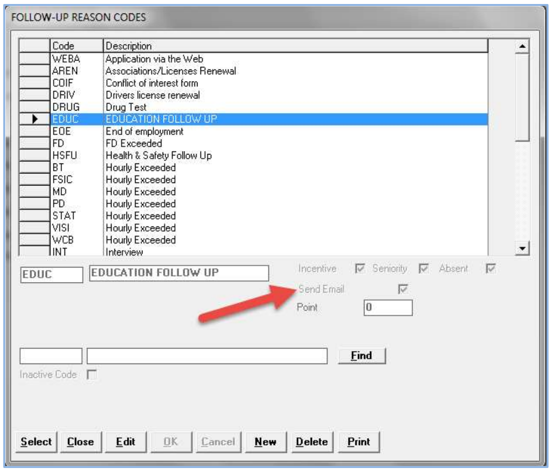


- To enter a new item, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button to save the changes or the delete icon button to delete the record.

Information Validation

Field	Purpose
Reason Code	Enter a Follow-Up reason code.
Days In Advance	Enter the number of days in advance the email will be sent.
Repeat Frequency	Select how often the email will be sent.
Employee	Check to send the email to the employee.
Rept. Authority 1 – 4	Check to send the email to employee's Reporting Authority.
Other Employees	Enter the employee numbers of those who will receive an email.
Other Email Addresses	Enter additional email addresses to receive an email.

Note: In addition to the above settings, the Send Email box must be checked on the Follow-Up reason code.

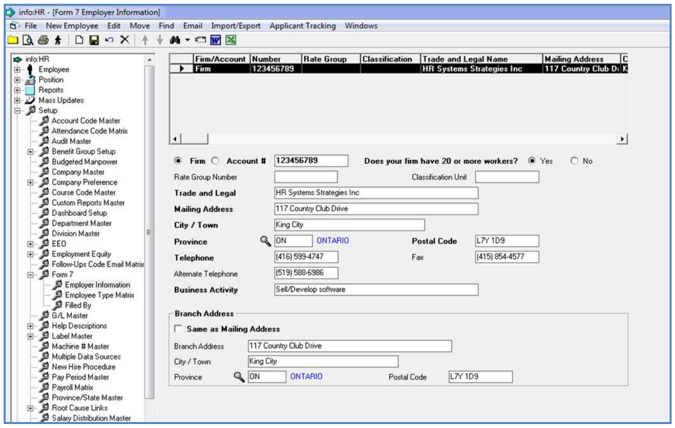


Form 7

Form 7 Employer Information

This screen is used to set up the information which will be printed on Ontario WSIB Forms. The Form 7/9 module needs to be purchased prior to using this function.

Screen Layout

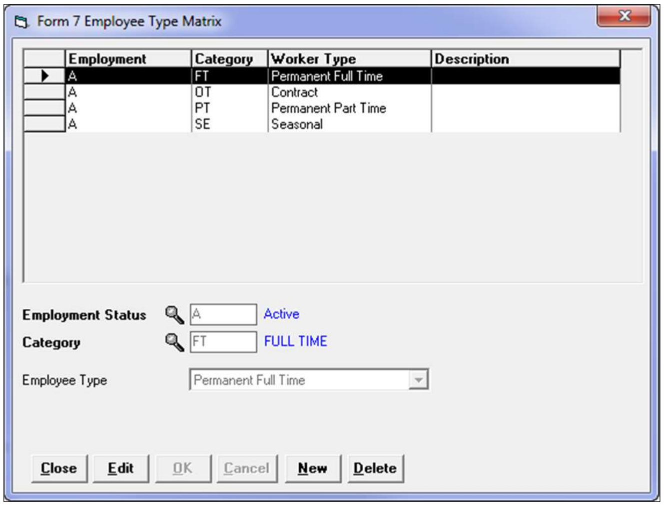


- To enter a new item, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.
- Complete fields as they pertain to your organization. Fields with bolded names must be completed prior to saving the record.

Form 7 Employee Type Matrix

The purpose of this matrix is to translate info:HR's Employment Status and Category codes to an Employee Type used by the WSIB.

Screen Layout



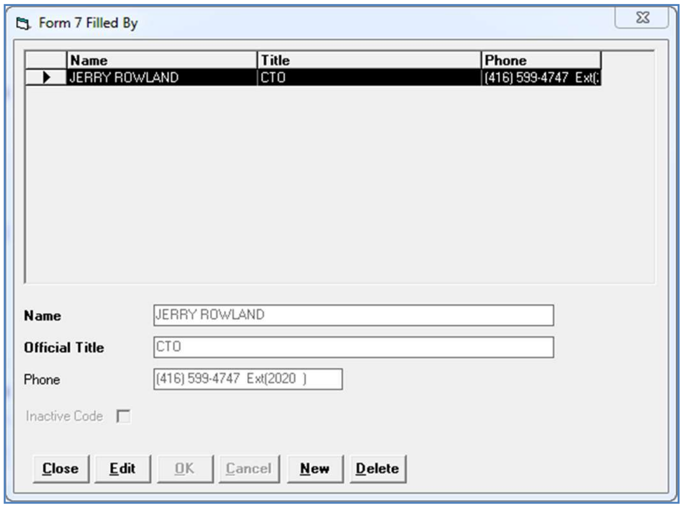
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.

Filled By

This table is used to create data that will populate the Form 7 Section J.

Screen Layout



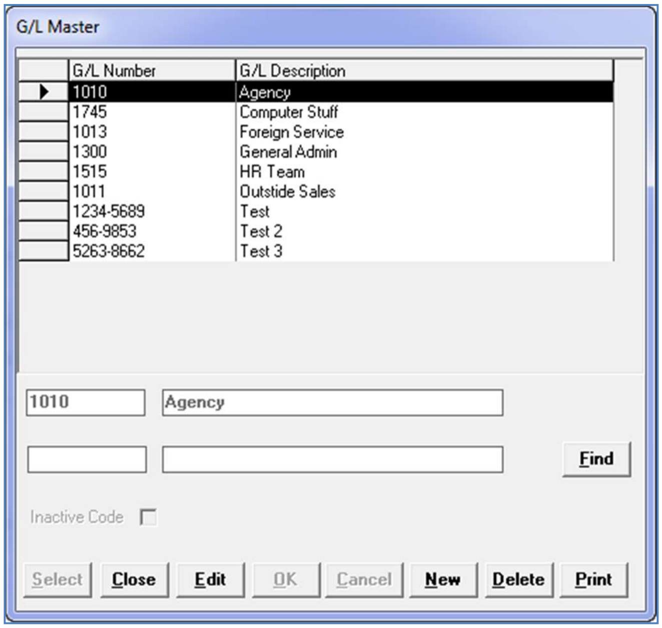
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.

Gen Ledger Master

This screen is used to validate information entered on the employee's Demographic and G/L Distribution Master screens. Data from those screens may feed into a payroll or time and attendance system.

Screen Layout



Buttons

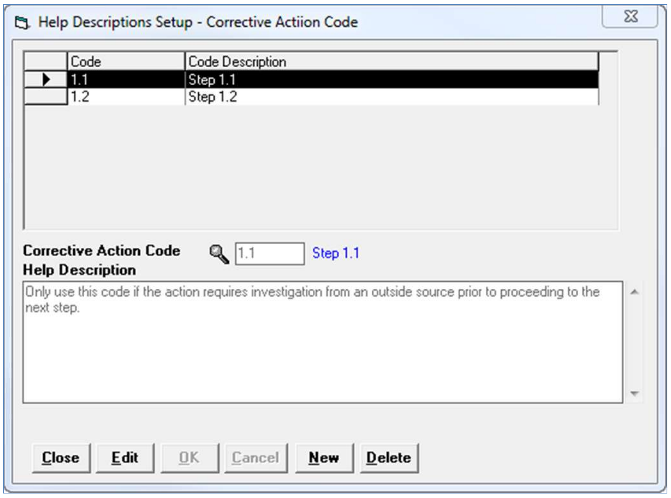
Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Find	Provides the ability to search based on either G/L # or Description.

Help Descriptions

Corrective Action Code

The purpose of this screen is to provide an English description of Corrective Action Codes used under the Health & Safety section of the Employee User Manual.

Screen Layout



Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.

Label Master

This Menu provides the ability to change some of the screen and report labels in info:HR to terms used by your organization. The menu is structured similar to the Employee menu. Once the field name has been changed, the new name will be reflected throughout all info:HR modules.

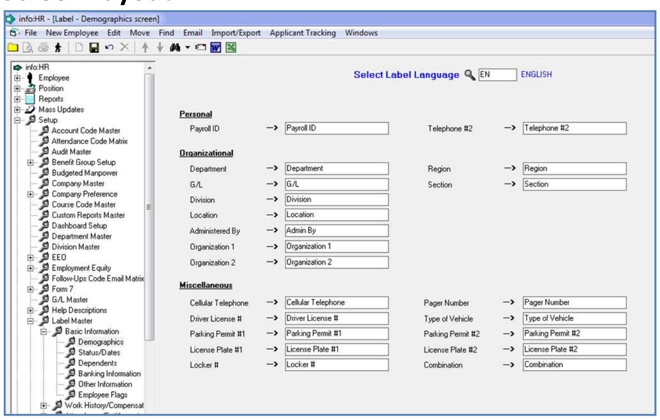
To change a field name:

- Find the name of the field in the list.
- Click in the field box to delete the existing name.
- Enter the desired name.

Basic Information

Demographics

Screen Layout

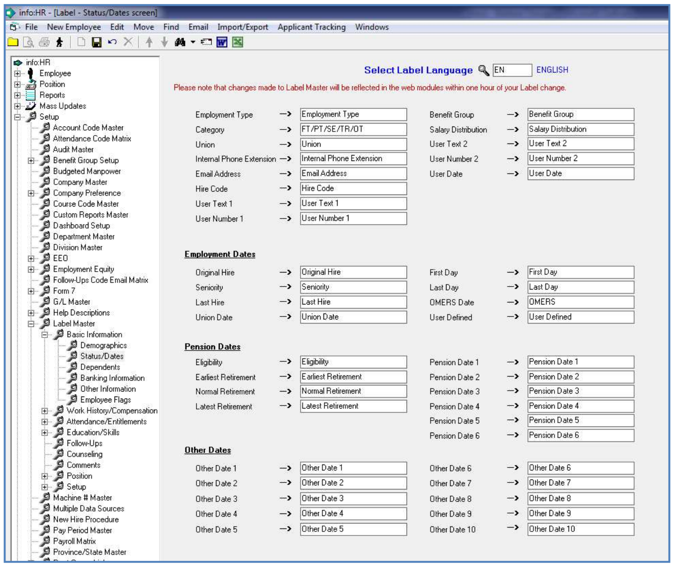


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Status and Dates

Screen Layout

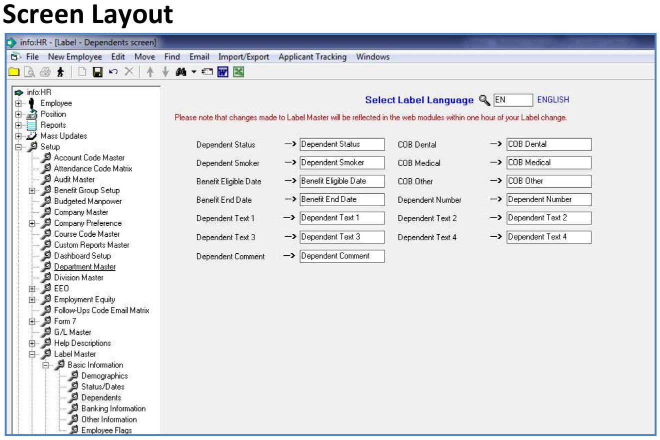


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Dependents

Screen Layout

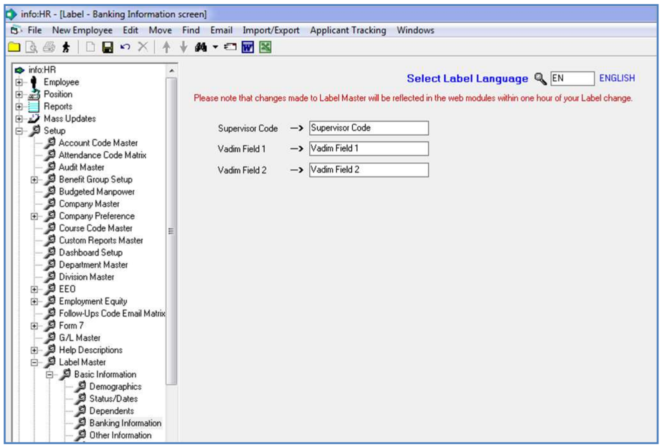


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Banking Information

Screen Layout

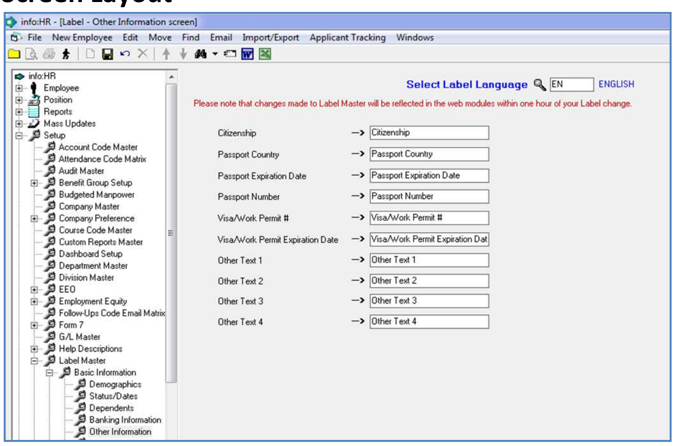


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Other Information

Screen Layout

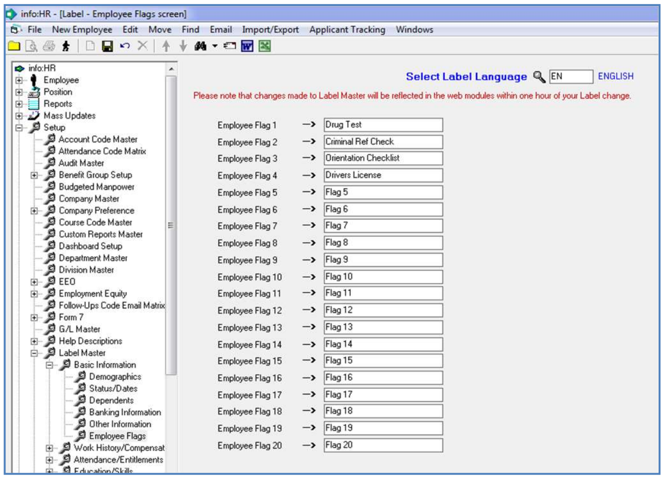


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Employee Flags

Screen Layout

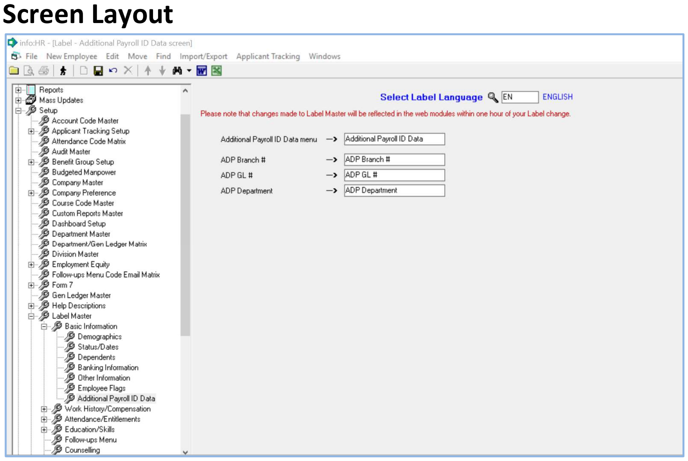


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Additional Payroll ID Data

Screen Layout



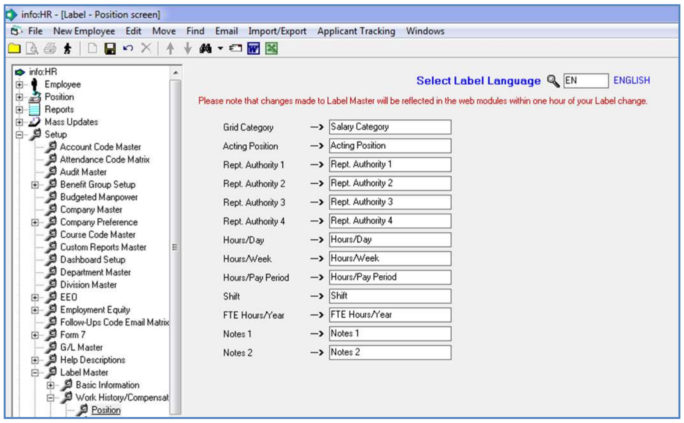
To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Work History/Compensation

Position

Screen Layout

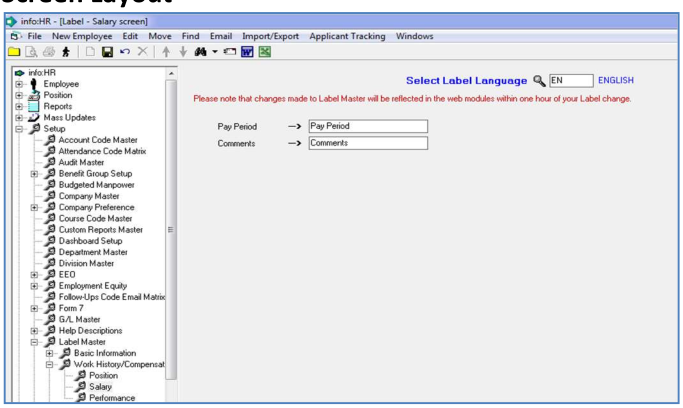


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Salary

Screen Layout

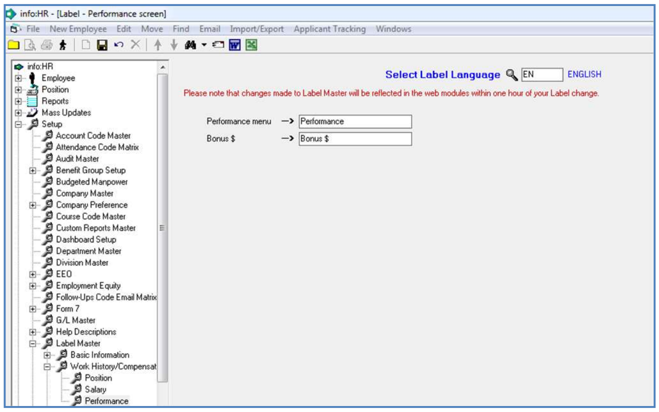


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Performance

Screen Layout



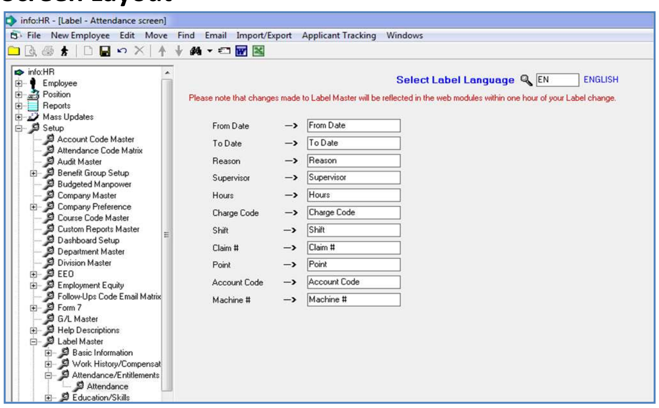
To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Attendance/Entitlements

Attendance

Screen Layout



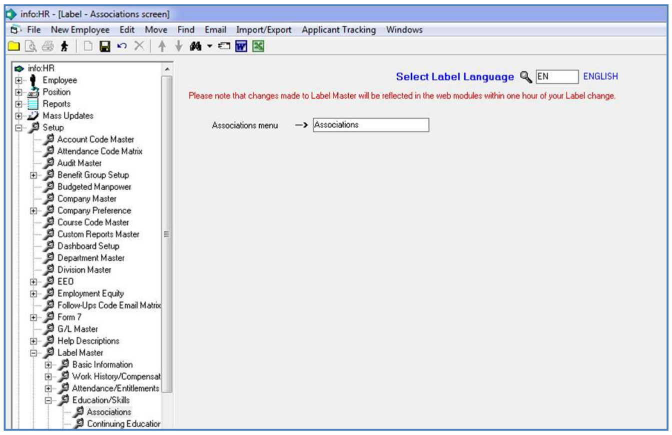
To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Education/Skills

Associations

Screen Layout

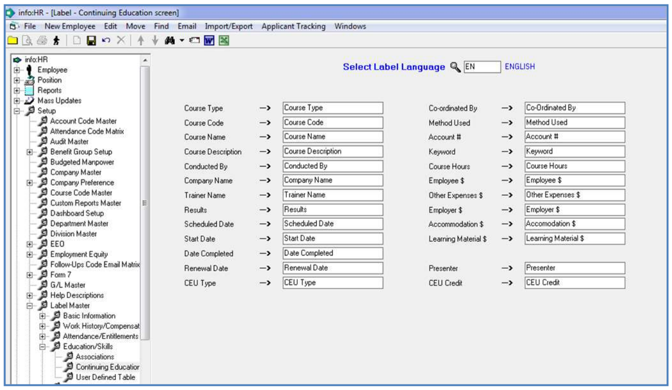


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Continuing Education

Screen Layout

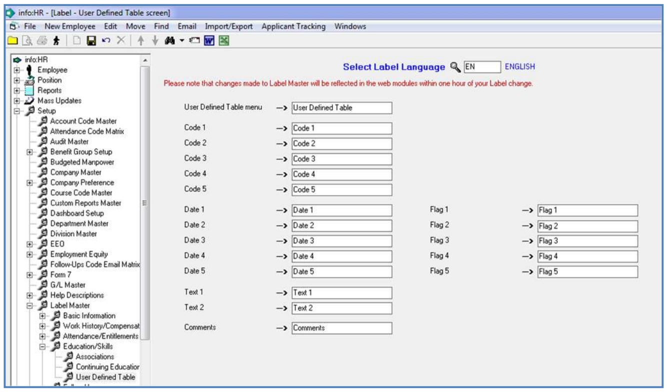


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

User Defined Table

Screen Layout

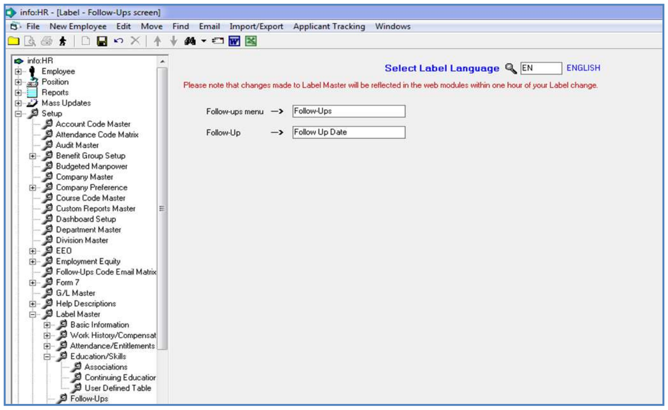


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Follow-ups

Screen Layout

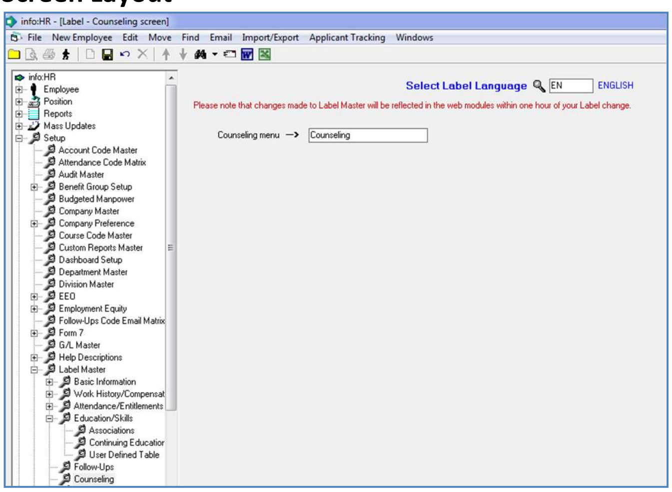


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Counselling

Screen Layout

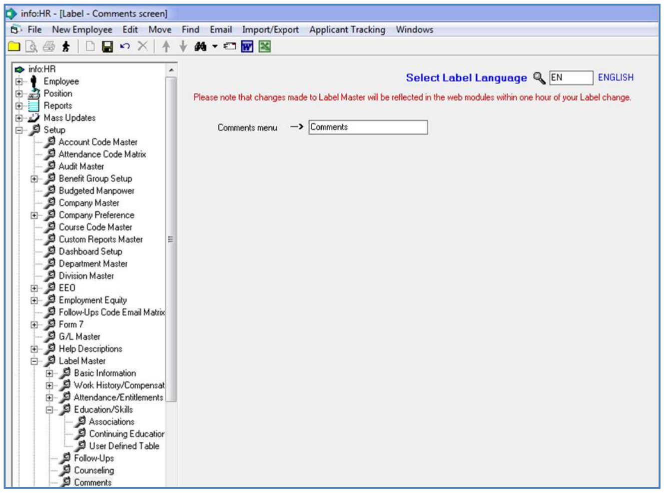


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Comments

Screen Layout



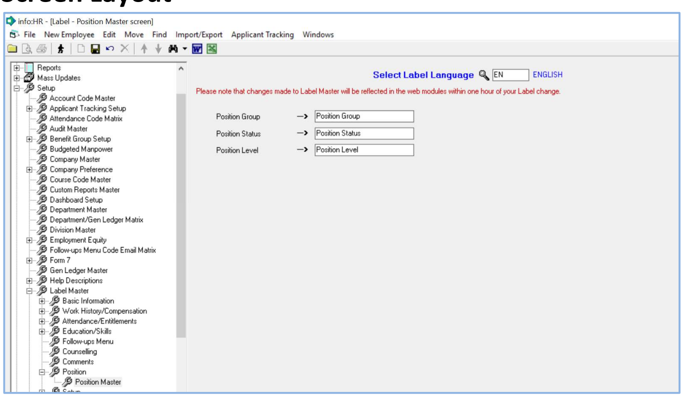
To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Position

Position Master

Screen Layout



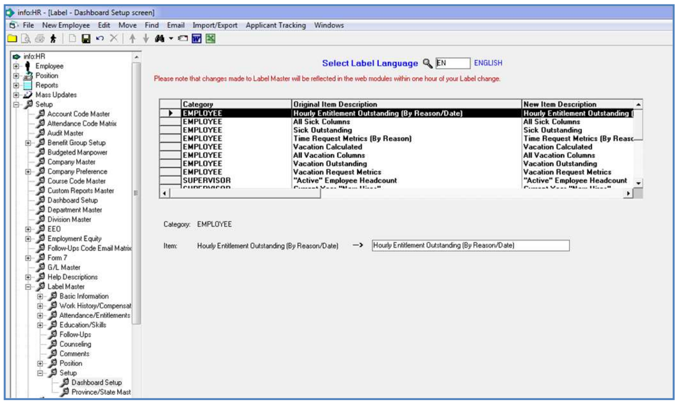
To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Setup

Dashboard Setup

Screen Layout

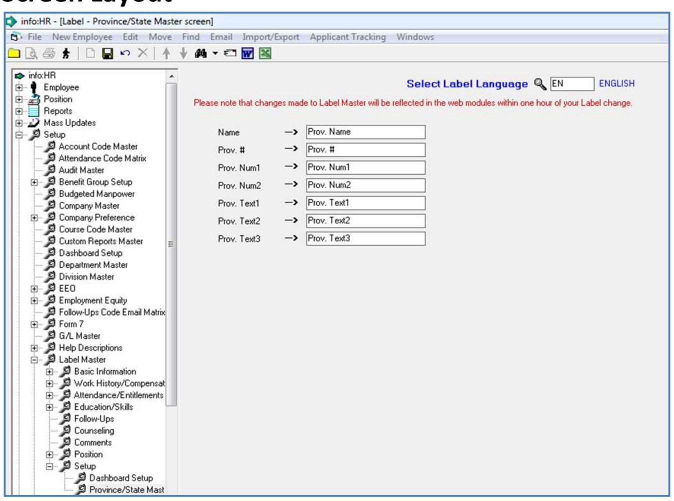


To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Province/State Master

Screen Layout



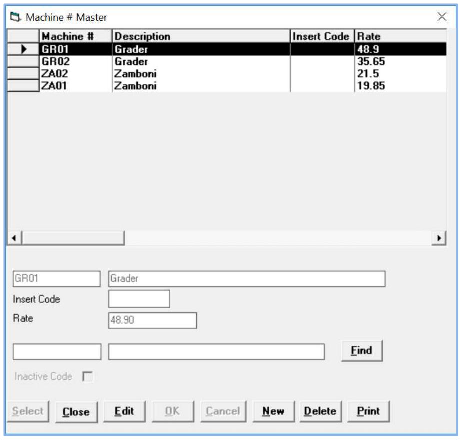
To change a field name

- Find the name of the field in the list.
- Click in the field box delete the existing name.
- Enter the desired name.

Machine # Master

Machine # Master provides the ability to create and maintain Machine # codes and is used in the Attendance and Timesheet with Equipment Cost modules. The purpose of this screen is to provide table validation during the data entry within those modules.

Screen Layout



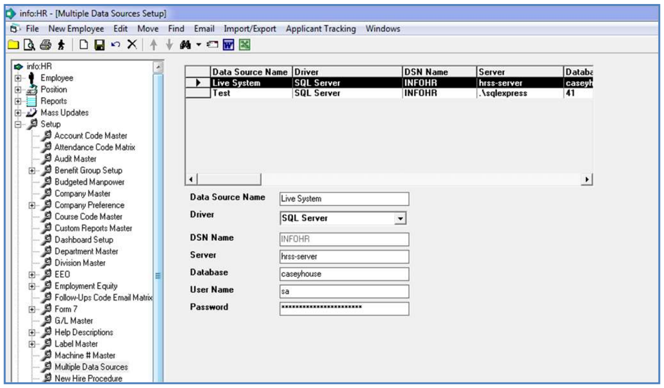
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Find	Provides the ability to search based on either Code or Description.

Multiple Data Sources

This screen provides the ability to set up multiple environments that the user can select prior to logging into info:HR. It is this screen that gives users the ability to identify the test environment connection strings to the MS SQL database.

Screen Layout



- To enter a new Data Source, click the new record icon 🗋 button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon 💾 button or the delete icon ☒ button to delete the record.

Information Validation

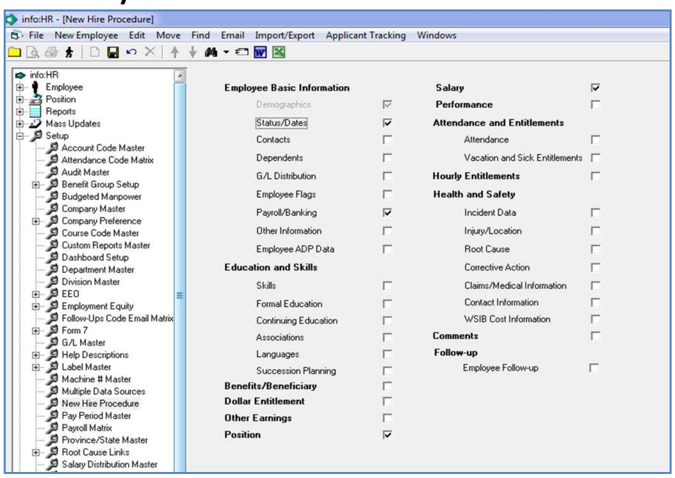
Field	Purpose
Data Source Name	By default, "Live" should be set up containing the DSN connection string to the database. Create a new name for each additional connection.
Driver	Always SQL Server.
DSN Name	Always INFOHR.
Server	IP Address or English name of the server where the MS SQL database resides.
Database	Name of the info:HR database. The "Live" database name is infohr.
User Name	info:HR SQL User Name.
Password	info:HR SQL User Name's password.

New Hire Procedure

The New Hire Procedure provides the ability for you to select the screens which will appear when a new employee is entered into info:HR. Four screens are checked as a default Demographics, Status/Dates, Position, and Salary. The default screens must be completed if an employee is to show up on reports and have entitlements calculated.

Once the New Hire procedure is completed, and to verify all screens are completed, click on the **What's Missing** button on the Demographics screen. The system will identify which screens were not completed in accordance with the New Hire Procedure.

Screen Layout



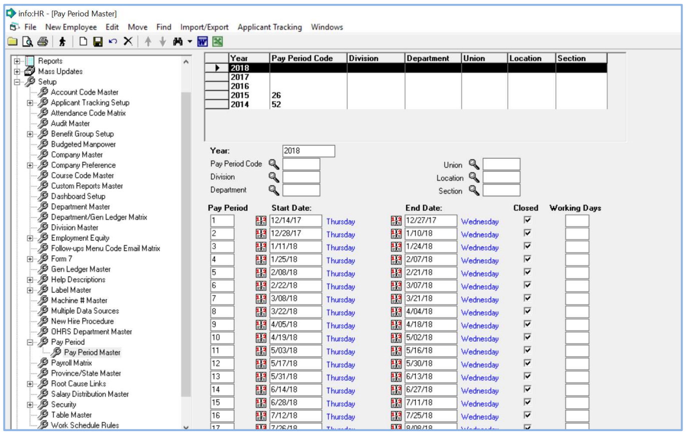
- Once the changes are made, click on the save icon button.

Pay Period Master

The Pay Period Master identifies the pay periods for the organization and must be set up on an annual basis if you are using the Timesheets module. Depending on the payroll interface you are using, this master file may also need to be completed. An organization may have more than on Pay Period Master for any given year.

Once the year has been completed and all processing is done, the Pay Period Master for that year should be deleted.

Screen Layout



- To enter a new Pay Period, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Entering a new Pay Period Master:

- Click the new record icon button.
- Enter the year.
- Select the number of pay periods from the dropdown.
- Enter the selection criteria as required.
- Enter ‘1’ in the first Pay Period.
- Enter the Start Date of the first Pay Period and press the <tab> key. The system will automatically complete the year’s pay periods using the Number of Pay Periods and the date of the first day in the Pay Period.

Payroll Matrix

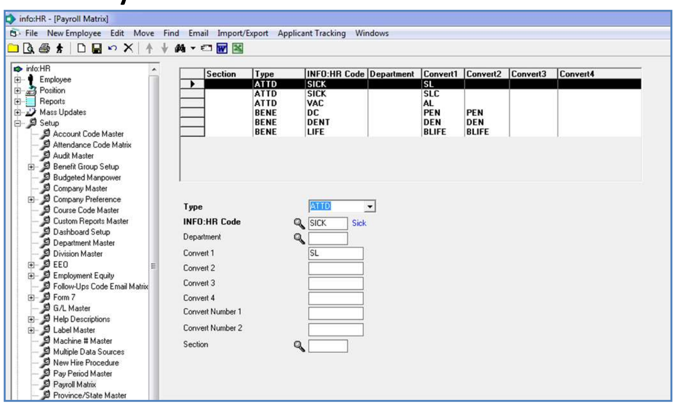
This function is used, as necessary, to support interfaces with 3rd party software. HR System Strategies Inc. Support staff will advise you when and how to use this function.

The Payroll Matrix is set up when codes used in info:HR need be translated into the equivalent codes used in the 3rd party software and vice versa. For example, a Payroll code for the info:HR Attendance Reason Code “vac” may be “13” in the payroll application. When importing and exporting information in a payroll interface for “vac” the system will translate it to/from code “13.”

The types of codes maintained in the Payroll Matrix are:

- Attendance, Benefits, Departments, Dollar Entitlements, Other Earnings, Payroll Transactions, and Union.

Screen Layout



- To enter a new Payroll Matrix, click the new record icon 🗋 button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon 💾 button or the delete icon ☒ button to delete the record.

Information Validation

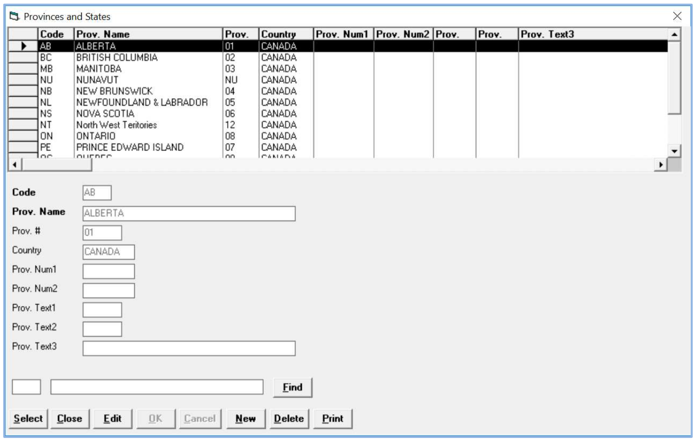
Field	Purpose
Type	Click the down arrow and choose one from: • Attendance – ATTD • Benefits – BENE • Dollar Entitlements – DOLE • Departments – DEPT • Other Earnings – EARN • Payroll Transactions – PAYT • Union Code – UNIO
Department	Only used for Type = DEPT. Enter the Department Code or click on the magnify glass to select the code from the lookup.

Field	Purpose
info:HR Code	Enter the code or click on the magnify glass to select from the lookup.
Convert 1,2,3,4	Enter the appropriate code required for the 3rd party software.
Section	Enter the code or click on the magnify glass to select from the lookup.

Province/State Master

Use this function to maintain *Province* and/or *State* codes/descriptions.

Screen Layout



Buttons

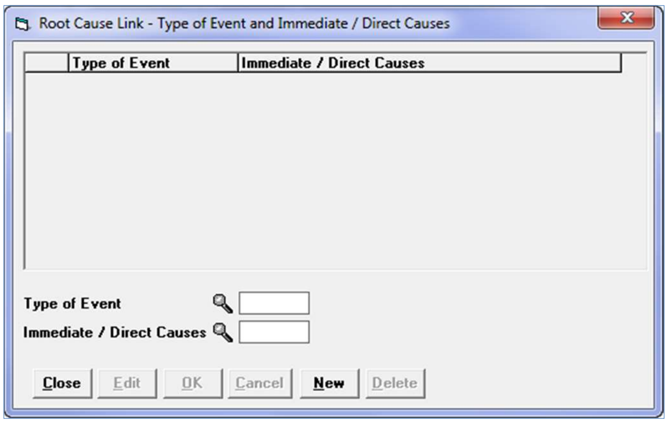
Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Find	Provides the ability to search based on either Code or Description.

Root Cause Links

Type of Event

This screen builds a matrix of valid Immediate/Direct Cause codes that can be used when assigning a specific Type of Event in the employee's Health & Safety module. When completed, the user will only be able to select certain Immediate/Direct Causes for the Type of Event entered. This improves consistency in data reporting.

Screen Layout



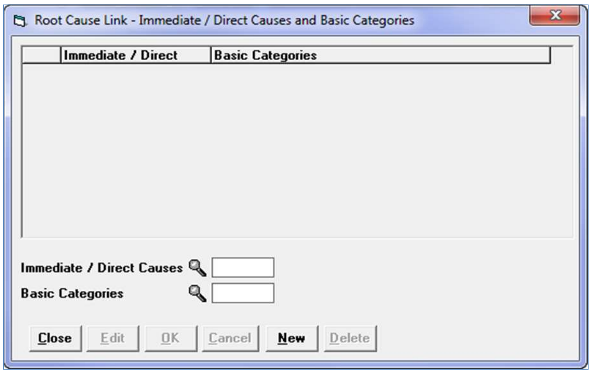
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.

Immediate/Direct Causes

This screen builds a matrix of valid Basic Category codes that can be used when assigning a specific Immediate/Direct Cause in the employee's Health & Safety module. When completed, the user will only be able to select certain Basic Categories for the Immediate/Direct Cause code entered. This improves consistency in data reporting.

Screen Layout



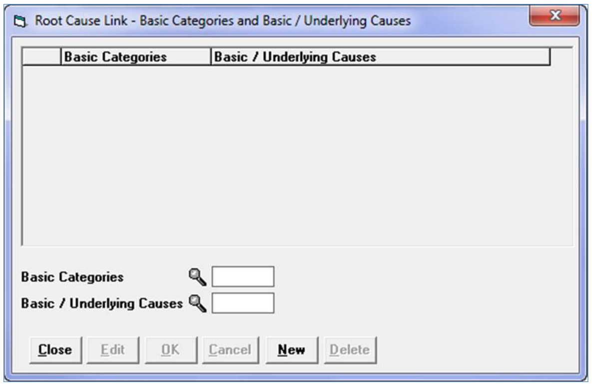
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.

Basic/Underlying Causes

This screen builds a matrix of valid Basic/Underlying Cause codes that can be used when assigning a specific Basic Categories in the employee's Health & Safety module. When completed, the user will only be able to select certain Basic/Underlying Cause codes for the Basic Category code entered. This improves consistency in data reporting.

Screen Layout



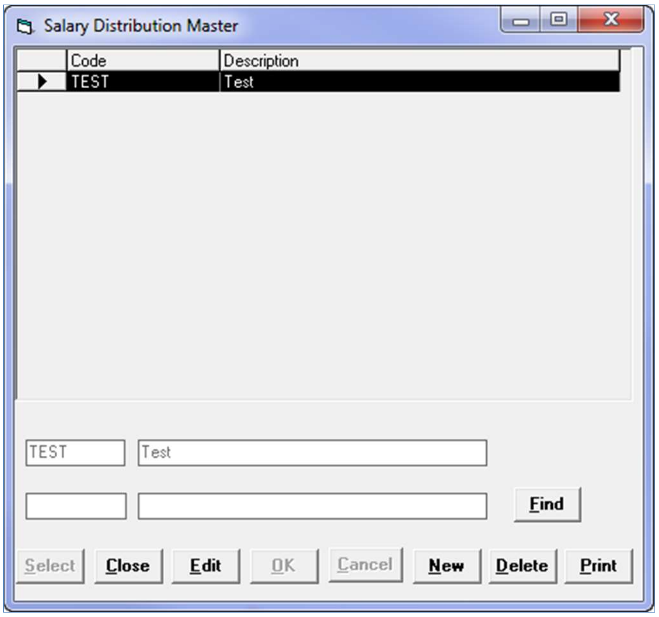
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.

Salary Distribution Master

This master file is used to validate the Salary Distribution Master found on the employee's Status/Dates screen. The Salary Distribution Master is used primarily by the Vadim Payroll integration but can be used for other purposes as well.

Screen Layout



Buttons

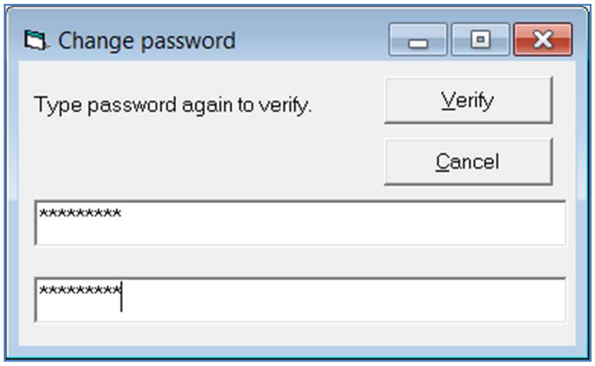
Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Find	Provides the ability to search based on either Code or Description.

Security

Change Your Password

Change Your Password provides the ability to change your login password. Once the new password has been entered, you will be asked to re-type the password for verification purposes.

Screen Layout



Security Master

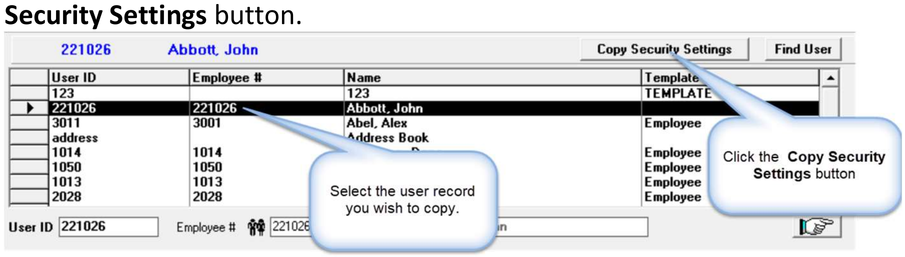
The Security Master is used to set up security access for each employee. There are many screens that need to be reviewed when creating a new user for info:HR including the screens under the menu item “More Security”.

There are three methods to create login users. They are:

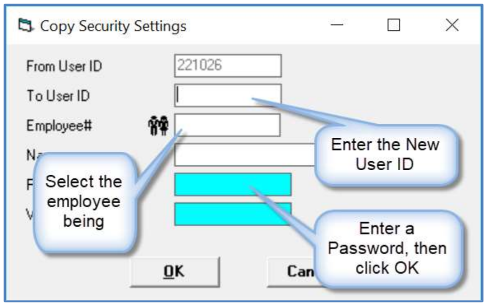
1. Copying the security settings from another user.
2. Setting up Security Templates and assigning templates to users. This is the recommended method to create users if you are using any info:HR web modules.
3. Manually creating the security profile.

Using the “Copy” method:

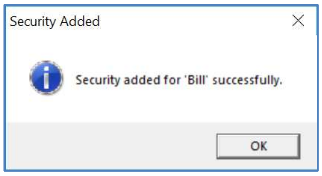
- Find the user with the security setting that you want to copy and click on the **Copy Security Settings** button.



- Enter the information requested in the pop-up screen.



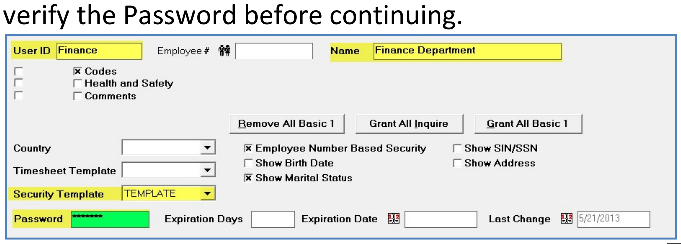
- Click **OK** to save the changes.



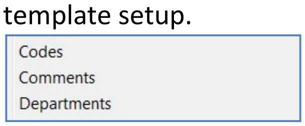
- Once the new user has been created, go through the info:HR Security Master screens for this employee and make employee-specific changes as needed.

Using Security Templates:

- To create a new template, click the new record icon button and the application displays a blank Security Master – Basic 1 screen.
  - Enter: User ID and Name. It is recommended that the word "Template" appears somewhere in the Name. For example: Finance Template.
  - Check the appropriate boxes granting security to Basic 1 functions.
  - Assigned Security Template should be "TEMPLATE".
  - Enter a Password and click the save ( ) icon in the toolbar. You will need to verify the Password before continuing.



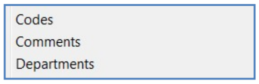
  - Continue creating the template by clicking on the hand icon.
  - Once all pages have been completed, click on More Security to complete the template setup.



    - Items excluded in the template are "Departments", "Country", "Timesheet Template" "Password". These fields are user-controlled and not role-based.
- Once the template has been created, the template can be assigned to new or existing User Ids by selecting the template name from the dropdown list shown in **Security Template**. For example: Finance.
- When you change the security profile of a Template, simply click on the Save ( ) icon and info:HR updates all the users associated with that template.

Manually creating the security profile:

- Starting with Basic 1, select the functions that are available for a given user.
- Once all pages have been processed, click on **More Security** to complete the security profile.



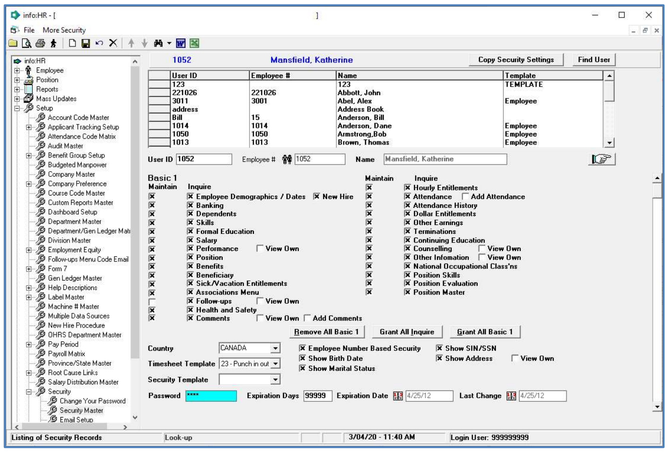
  - Since info:HR is heavily code based, it is recommended to check all codes when giving security rights to the User ID under the **Codes** option. The user is restricted to certain info:HR forms. Giving the user access to a code that is located on a form that they don't have access to will not cause any harm.
  - To give access rights to employee comments, the **Comments** option must be completed.

Departments is the most important setting in this group. This setting identifies which group of employees the User can view. Department "ALL" should only be given to an overall administrator.

Basic 1

This is the starting screen when building a User Security Profile.

Screen Layout



- To enter a new security profile, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.
- To move to the next screen, click on the hand icon <u>after</u> saving your changes on the screen.

Information Validation

Field	Purpose
Check box	Turns on the function within info:HR. Modes are either Inquiry, Maintain (for most functions, this mean Add, Modify and Delete) or Add (only).
Country	Select the country where the user resides. “ALL” should not be selected.
Timesheet Template	Used only if the Timesheet module is used. This option provides the ability to select a Timesheet template for the user. By using this option, the users will not have to select a Timesheet template prior to opening their Timesheet.
Security Template	Provides the ability to select a Security Template for the user.
Password	Enter a password for the user. Password changes need to be verified. If a password is forgotten, a new password will need to be set.
Expiration Days	Provides the ability to set a number of days the password is valid for. By default, 99999 is

Field	Purpose
	assigned to the expiration days. This setting is used to bypass the expiration logic.
Expiration Date	Displays the date the password expires based on the Expiration Days.
Last Change	Displays the date the password was last changed.

Important check boxes for consideration:

Employee Number Based Security:

- This is used in ESS or Timesheets. When checked, the users are able to view only their employee information and not view any other employees regardless of the Department Security settings.

Show Birth Date:

- When checked, the user will be able to view birth dates of employees.

Show Marital Status:

- When checked, the user will be able to view marital status of employees.

Show SIN/SSN:

- When checked the user will be able to view SIN/SSN of employees. This information should only be viewable by a limited number of staff.

Show Address:

- When checked the user will be able to view addresses of employees.

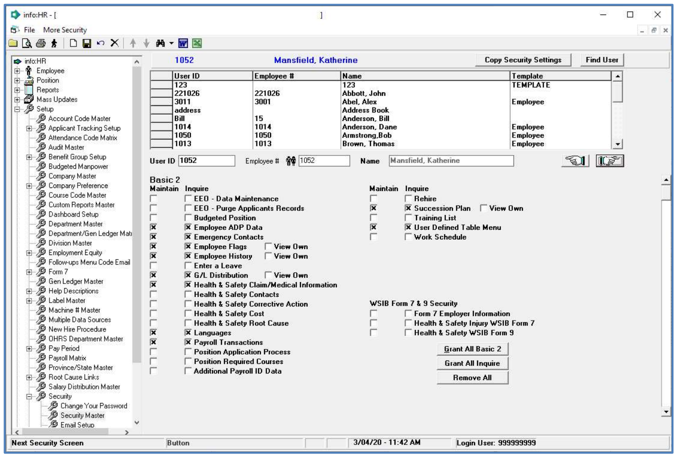
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All Basic 1	Provides the ability to delete all checks from the selected user.
Grant All Inquire	Provides the ability to automatically check the “Inquire” option to all areas in Basic 1.
Grant All Basic 1	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Basic 1.

Basic 2

The Basic 2 screen is an extension of Basic 1 and provides the ability to select which menu screens the employee can Inquire on or Maintain information.

Screen Layout



- To move to the next screen, click on the hand  icon after saving your changes on the screen.
- To move to the previous screen, click on the hand  icon after saving your changes on the screen.

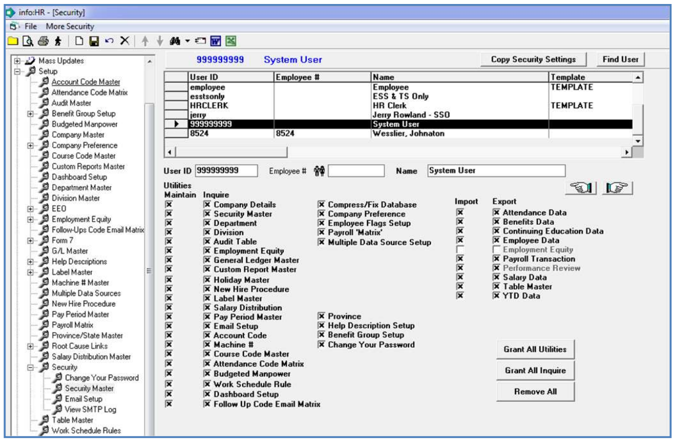
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All Basic 1	Provides the ability to delete all checks from the selected user.
Grant All Inquire	Provides the ability to automatically check the “Inquire” option to all areas in Basic 2.
Grant All Basic 2	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Basic 2.

Utilities

The Utilities security screen provides the ability to grant access to the Setup menu items as well as the Import and Export functions in info:HR. These security settings are usually assigned to administrators. For example: Users responsible for utilizing time, attendance and payroll interfaces or users who are responsible for the general setup of info:HR.

Screen Layout



- To move to the next screen, click on the hand  icon after saving your changes on the screen.
- To move to the previous screen, click on the hand  icon after saving your changes on the screen.

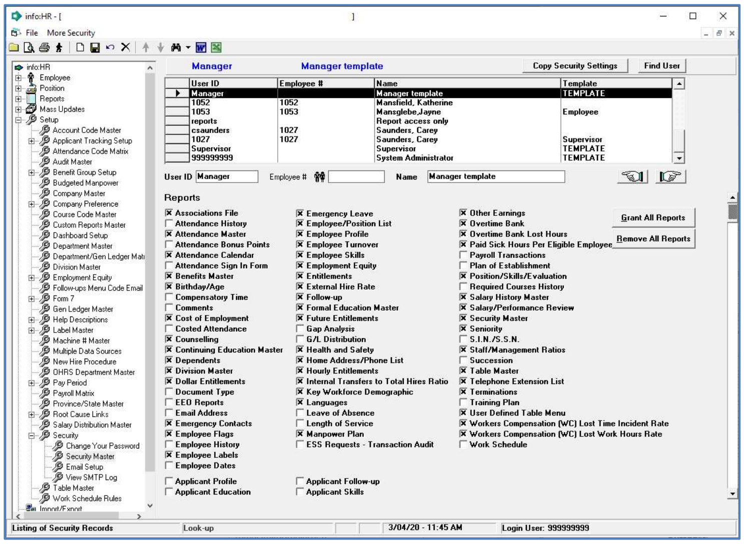
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All Utilities	Provides the ability to delete all checks from the selected user.
Grant All Inquire	Provides the ability to automatically check the “Inquire” option to all areas in Utilities.
Grant All Utilities	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Utilities.

Reports

The Reports security page provides the ability to grant access to users to selected reporting functions in info:HR.

Screen Layout



- To move to the next screen, click on the hand  icon <u>after</u> saving your changes on the screen.
- To move to the previous screen, click on the hand  icon <u>after</u> saving your changes on the screen.

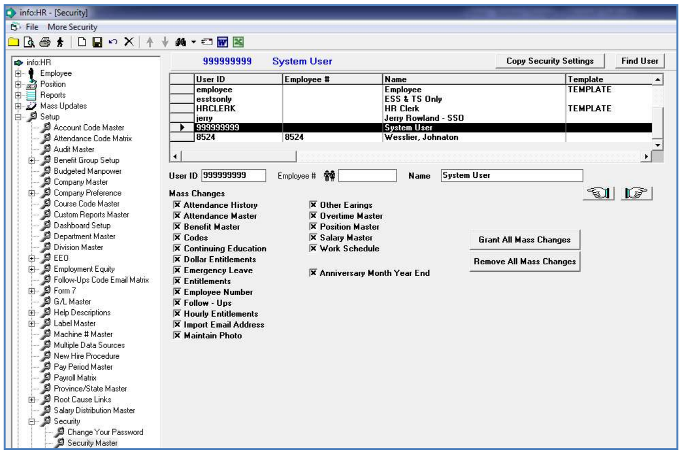
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All Reports	Provides the ability to delete all checks from the selected user.
Grant All Basic 1	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Reports

Mass Changes

The Mass Changes security page provides the ability to grant access to selected Mass Change functions in info:HR. Limited access should be given to this function.

Screen Layout



- To move to the next screen, click on the hand  icon after saving your changes on the screen.
- To move to the previous screen, click on the hand  icon after saving your changes on the screen.

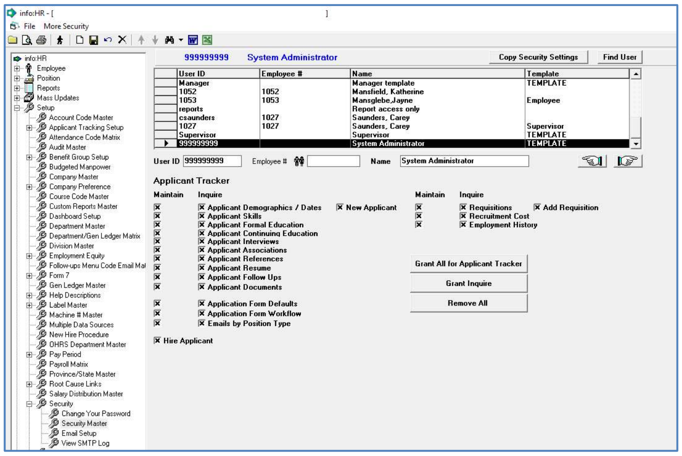
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All Mass Changes	Provides the ability to delete all checks from the selected user.
Grant All Changes	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Mass Changes.

Applicant Tracker

The Applicant Tracker security page is used if you have the Applicant Tracker module. This page provides the ability to select access for this module for users.

Screen Layout



- To move to the next screen, click on the hand  icon after saving your changes on the screen.
- To move to the previous screen, click on the hand  icon after saving your changes on the screen.

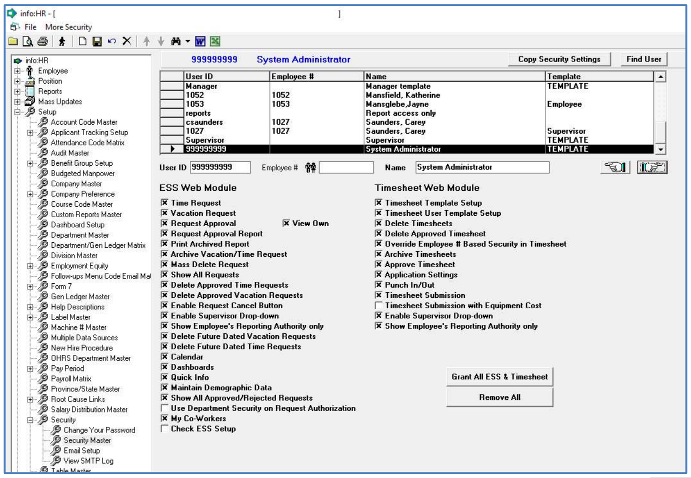
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All Applicant Tracker	Provides the ability to delete all checks from the selected user.
Grant All Inquire	Provides the ability to automatically check the “Inquire” option to all areas in Applicant Tracker.
Grant All Applicant Tracker	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Applicant Tracker.

ESS & Timesheet Web Modules

The ESS Web Module security page is used if you have the ESS and/or Timesheet modules. This page provides the ability to select for this module for users.

Screen Layout



- To move to the next screen, click on the hand  icon after saving your changes on the screen.
- To move to the previous screen, click on the hand  icon after saving your changes on the screen.

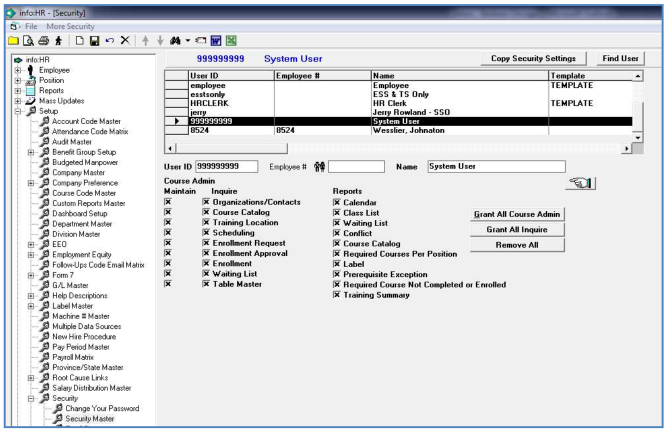
Buttons

Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All	Provides the ability to delete all checks from the selected user.
Grant All ESS & Timesheets	Provides the ability to automatically check the "Inquire", "Add" and "Maintain" options to all areas in ESS & Timesheets.

Course Admin

The Course Admin security page is used if you have the Course Admin module. This page provides the ability to select access for this module for users.

Screen Layout



- To move to the next screen, click on the hand  icon <u>after</u> saving your changes on the screen.
- To move to the previous screen, click on the hand  icon <u>after</u> saving your changes on the screen.

Buttons

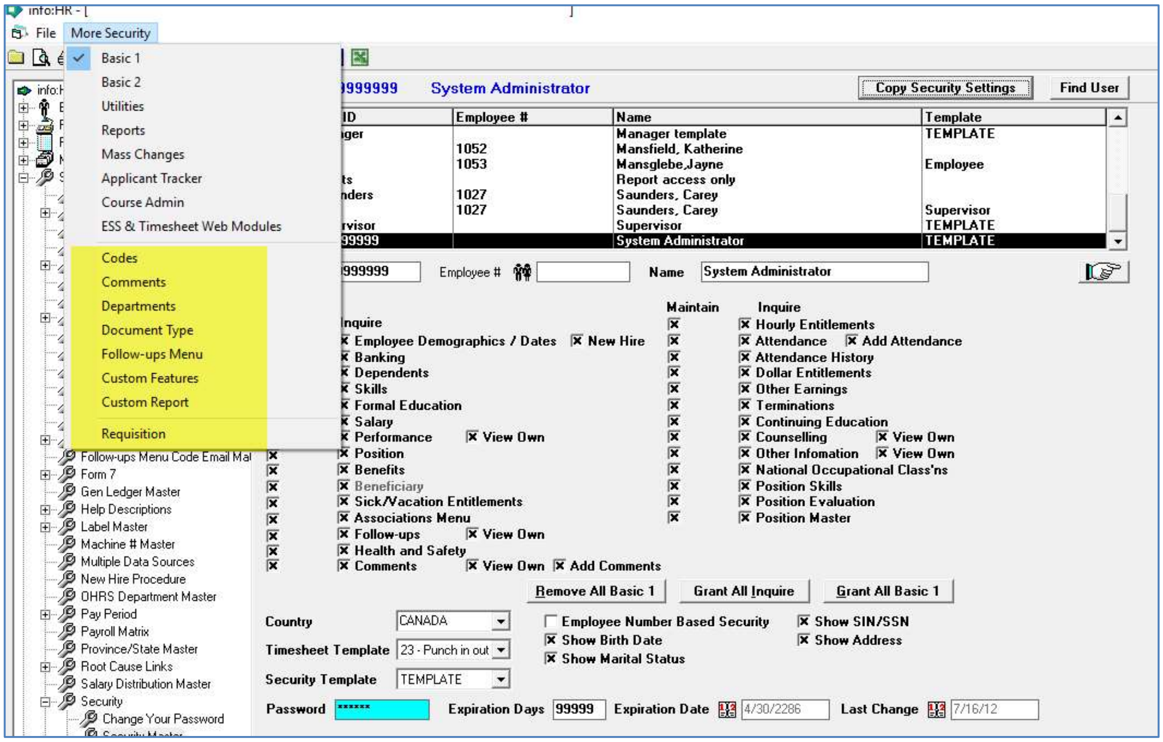
Button	Purpose
Copy Security Settings	Provides the ability to copy the security settings to be assigned to another user.
Find User	Provides the ability to find a user in the system. Users can be found via their name or User ID.
Remove All	Provides the ability to delete all checks from the selected user.
Grant Inquire	Provides the ability to automatically check the “Inquire”, “Add” and “Maintain” options to all areas in Course Admin.

More Security

More Security is accessible from the top menu from any security screen in the Security Master. More Security is used to navigate through additional screens required in order to create a User Security Profile.

The hands icons ( / ) are used to navigate menu items Basic 1 though ESS & Timesheet Web Modules. The remaining screens must be navigated via the More Security menu item.

Screen Layout

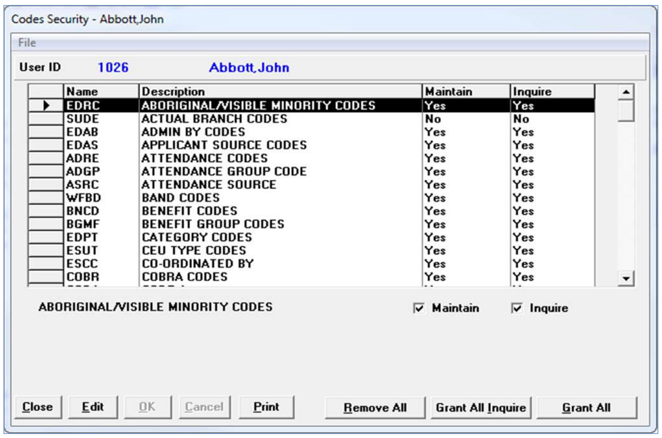


- Select the item from the dropdown list. A window pops up with details to be completed.
- Refer to the pages below for details on for each of the below options:
  - Codes
  - Comments
  - Departments
  - Document Type
  - Follow-Ups Menu
  - Custom Features (only available if you have custom development done by HR Systems Strategies)
  - Custom Reports
  - Requisition

Codes Security

Codes Security provides the ability to assign “Inquire” or “Maintain” access to a user. It is recommended that not all users be given the ability to “Maintain” all codes. A “keeper of the codes” should be decided upon. Giving users the ability to “Inquire” on all codes is an acceptable practice. Since the User has been restricted to which functions they can access, giving the User access to codes that they cannot see would not cause an issue. Since info:HR is heavily coded-based, assigning individual Table Codes would be a very time-consuming task.

Screen Layout



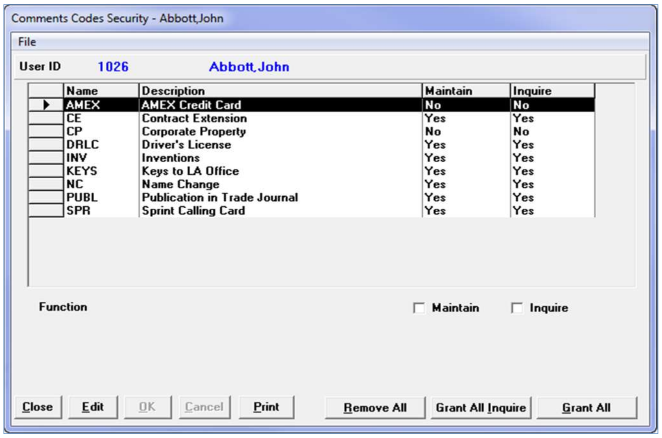
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Print	Will print a list of all records displayed in the table.
Remove All	Will uncheck “Maintain” and “Inquire”.
Grant All Inquire	Will grant “Inquire” access to all codes.
Grant All	Will grant “Maintain” and “Inquire” access to all codes.

Comments Security

Comments Security provides the ability to limit certain types of comments to be maintained or viewable by users. You may want Comment Types that contain personal information restricted to a selected group of users and not visible to all.

Screen Layout



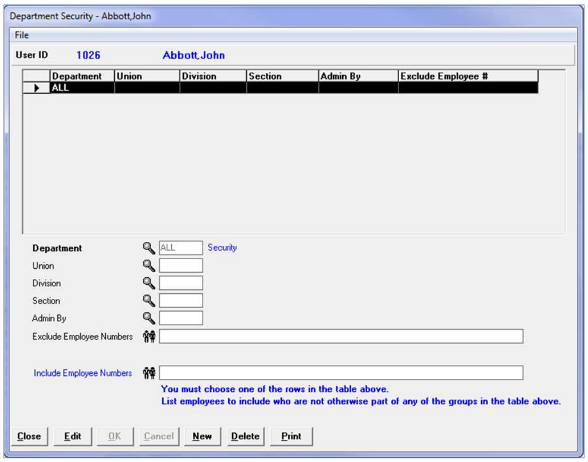
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
Print	Prints a list of all codes displayed in the table.
Remove All	Will uncheck “Maintain” and “Inquire”.
Grant All Inquire	Will grant “Inquire” access to all codes.
Grant All	Will grant “Maintain” and “Inquire” access to all codes.

Departments Security

Departments Security provides the ability to provide access to a user to view groups of employees based on the Selection Criteria. Without this screen being completed, the new User will not be able to view ANY employee data, including themselves. A User may have up to a maximum of 50 lines showing in the grid box.

Screen Layout



Information Validation

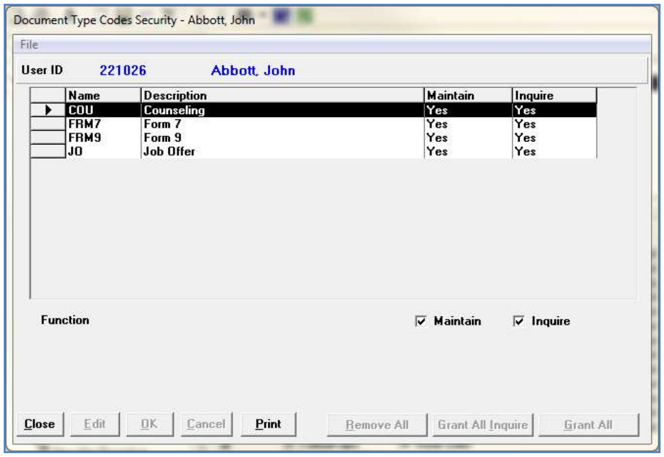
Field	Purpose
Department	Enter the Department or click on the magnify glass to select the code from the lookup. Department "ALL" is reserved for Users who can view all employees in all departments.
Union/Division/Section/Admin By	Enter the code or click on the magnify glass to select the code from the lookup.
Exclude Employee Number	Enter the employee numbers or click on the icon to select employees from the lookup. The employee excluded must be part of the group entered above. For example: Division 1000 is entered; Joe Smith is in Division 1000 but his data should not be displayed to the user; enter his employee # in the Exclude box.
Include Employee Number	Enter the employee numbers or click on the icon to select employees from the lookup. The employee include cannot be part of the group entered above. For example: Division 1000 is entered; Jane Stone is in Division 1100 but should be displayed to the user; enter her employee # in the Include box.

Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.

Document Type Security

Document Type Code Security provides the ability to provide access to Document Type Codes to a user. Whenever a new Document Type Code is created, this security screen needs to be updated.



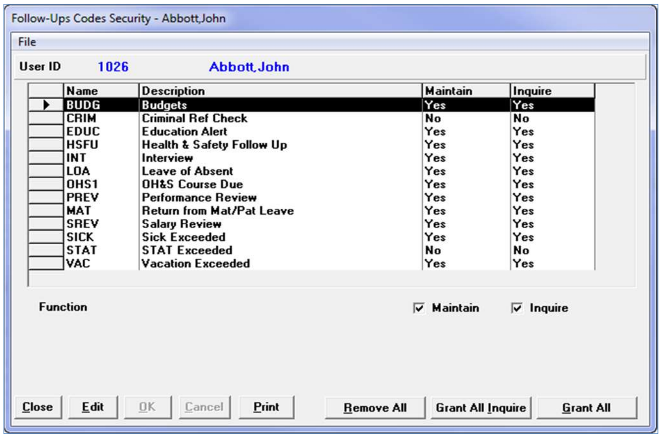
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Remove All	Will uncheck “Maintain” and “Inquire”.
Grant All Inquire	Will grant “inquire” access to all codes.
Grant All	Will grant “Maintain” and “Inquire” to all codes.

Follow-ups Security

Follow-ups Security provides the ability to provide access to Follow-up Codes to a user. If the Follow-ups screen in Basic 1 is given to the user, this screen must be completed. Whenever a new Follow-up Code is created, this security screen needs to be updated.

Screen Layout



Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Remove All	Will uncheck “Maintain” and “Inquire”.
Grant All Inquire	Will grant “inquire” access to all codes.
Grant All	Will grant “Maintain” and “Inquire” to all codes.

Custom Features

This feature may be required only if the organization has implemented certain custom-developed features.

Custom Report

This feature is only used if:

1. You have built your own Crystal Reports using Crystal Reports Version 8.0.
2. HR Systems Strategies has built custom reports on your behalf.

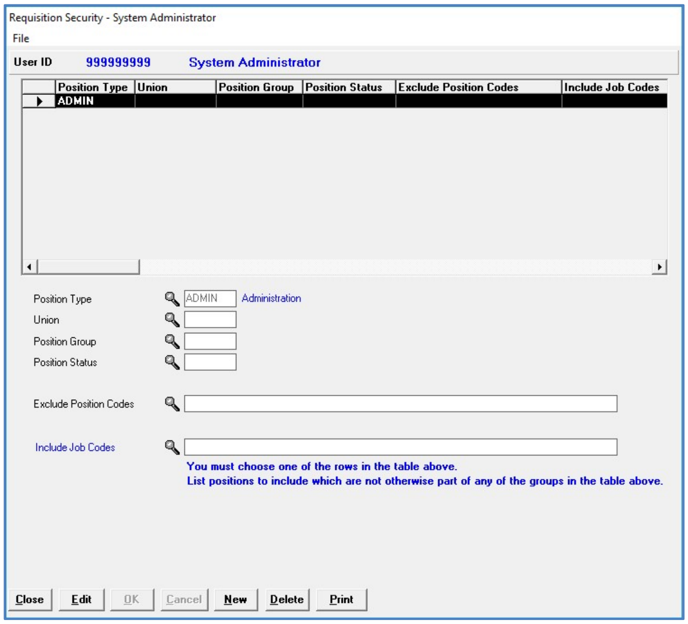
Screen Layout

Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.
Grant All Users	Will grant “Inquire” access to all Users that are currently set up with a security profile. Caution is advised if selecting this button.
Grant All	Will grant “Inquire” to all reports for the specific user.

Requisition Security

Requisition Security provides the ability to provide access to a user to view Job Requisitions based on the Selection Criteria. Without this screen being completed, the new User will not be able to view ANY requisition data. A User may have up to a maximum of 50 lines showing in the grid box.



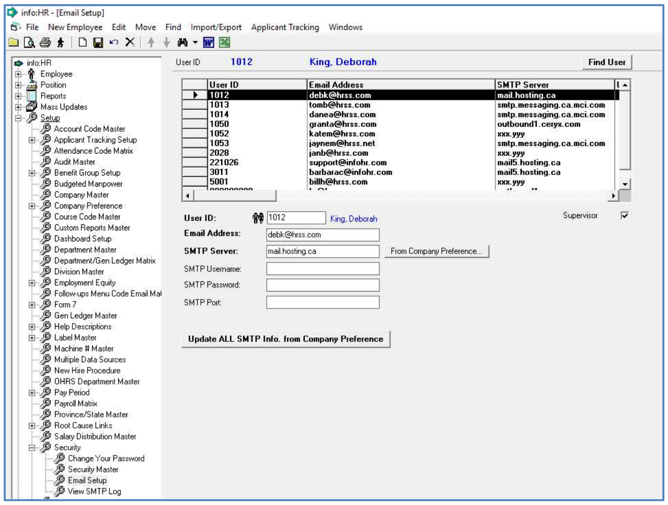
Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.

Email Setup

If the ESS and/or Timesheets modules are use, this screen must be completed. The information needed on this screen would be provided by IT. Also, there is an ability to import this information via an Excel spreadsheet.

Screen Layout



Information Validation

Field	Purpose
User ID	Enter or use the lookup to select a User ID.
Superior	Check if the user has the ability to approve ESS Requests or Timesheets.
SMTP Server	Enter the server name or IP Address of your Exchange server.
SMTP User Name	Only entered if your Exchange server requires this information.
SMTP Password	Only entered if your Exchange server requires this information.
SMTP Port	Only entered if your Exchange server requires this information.

Buttons

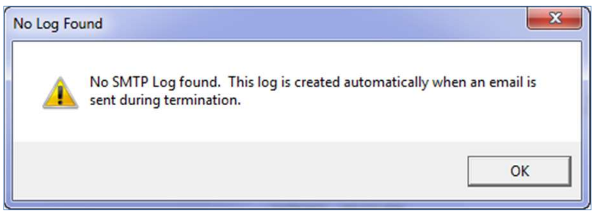
Button	Purpose
Find User	Provides the ability to search by User ID.
From Company Preference	Provides the ability to update the SMTP server information from the Company Preference screen if it is present.
Update ALL SMTP Info. From Company Preference	Provides the ability to update the SMTP server information for all user ID's from the Company Preference screen if it is present.

View STMP Log

STMP logs are automatically created whenever info:HR sends an email. Its purpose is to record whether or not the Exchange server was able to send the email message. This log is normally viewed by IT whenever there is an issue that emails are not being received. To interpret the log, call HR Systems Strategies' support desk for assistance.

Two possible screens could pop up. They are:

- Displays the mail server, port and status of the email.



- This message could have multiple meanings. If the Email Setup does not exist, the SMTP log will not be created.
- Contact HR Systems Strategies for support.


Date: 2/08/19
Time: 2:27:35 PM

HR Systems Strategies Inc.
SMTP Log

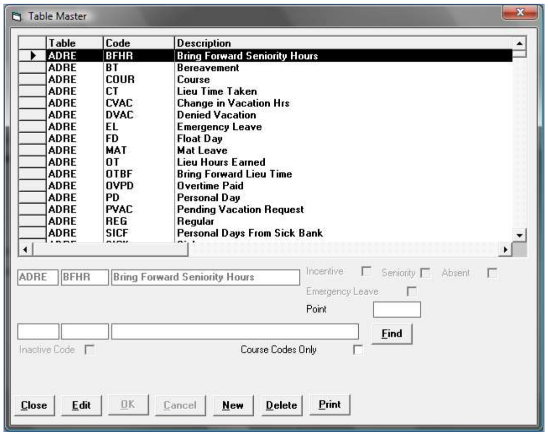
Page: 1
RZSMTPLOG

Source	Status	Changed Date	Time	Changed By
Enter Leave - Abel, Alex	Connecting to outbound1.ceryx.com port 25	11/20/14	14:38:38	999999999
Enter Leave - Anderson,	Connecting to outbound1.ceryx.com port 25	7/31/17	08:13:24	999999999

Table Master

This function is used to maintain the coding structures within info:HR. The coding structures can be maintained on the data entry screens as well. It is strongly recommended that table coding structures are maintained via their data entry screen and not via this function. The Table Master report will identify each table code and the associated user entries.

Screen Layout



Information Validation

Field	Purpose
Table	Mnemonic code for the table.
Code	User create table entry.
Description	Description of the table entry.
Incentive	Not used.
Seniority/Absent/Emergency Leave/Point	Used for Attendance Reason Codes to identify: 1. Seniority hours 2. Absent hours 3. Emergency Leave Reason Codes 4. Point values if Attendance Reason Code is used
Inactive Code	Used to identify codes no longer in use but cannot be deleted due to the codes still assigned to master file data. Any code marked “Inactive” appears in red in the table lookup.
Course Codes Only	Check this box to show only Course Codes.

Buttons

Button	Purpose
Close	Closes the table.
Edit	Allows editing of any details.
OK	Saves changes made during the New or Edit function.
Cancel	Will stop any actions taken.
New	To enter a new record.
Delete	To delete a line.
Print	Will print a list of all records displayed in the table.

Work Schedule Rules

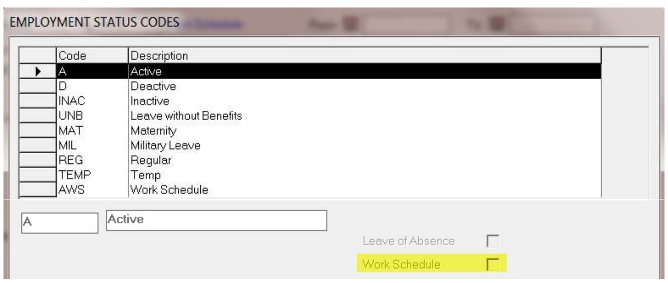
This feature is used in the ESS and Timesheet modules. Prior to turning this function on, you should set up a test environment to review how the options will work in your environment. There are Application Settings and Security Profile settings that need to be considered, too.

Step 1 – Identifying Employment Status Codes

To use Work Schedules, you must identify which Employment Status codes can have a Work Schedule assigned to them. It is recommended that a NEW Employment Status code be created for work schedule purposes.

To identify the Employment Status used in Work Schedules, complete the steps below:

1. Find an active employee.
2. Open the Status/Dates screen found under Basic Information.
3. Click on the magnify glass across from Employment Status.

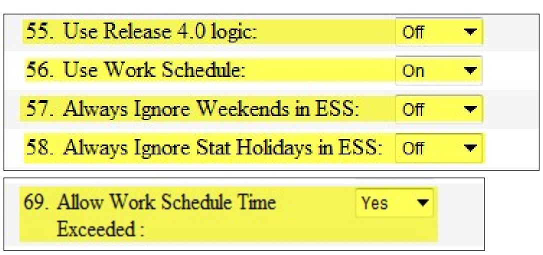


- Either create a new code or find a code that will be used by Work Schedule.
- Click on **Edit** and check the **Work Schedule** checkbox.
- Click on **OK** to save.

4. Once the Employment Status has been identified, go to each employee record that will use a work schedule and make sure that the Employment Status uses the correct code.

Step 2 – Application Settings (ESS)

All Application settings should be reviewed but the settings below need to be set correctly in order for the Work Schedule logic to perform as designed.

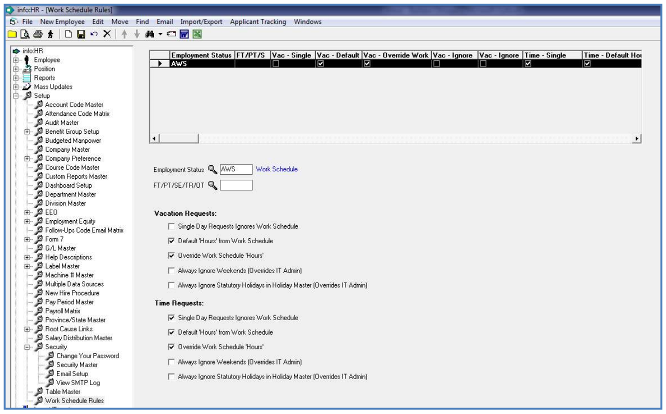


- Item 55 must be set to Off.
- Item 56 must be set to On.
- Items 57 & 58 setting will depend on whether or not a Work Schedule includes a weekend or stat holiday. If an employee is scheduled to work a Saturday or Sunday, Item 57 must be set off. If your organization is open during stat holidays, Item 58 must be set off.
- Item 69 is dependent on your organization’s policy on working extra time.

Step 3 – Creating Rules

One or more rules can be created based on a combination of Employment Status and Category. An Employment Status must be marked as a usable code for Work Schedule. Refer to step #1.

Screen Layout



- To enter a new item, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Rule Definitions - Vacation Requests:

Single Day Request Ignores Work Schedule

- If checked, a one-day request does not read the employee's Work Schedule. The "Hours per Day" comes from the employee's current Position.

Default 'Hours' from Work Schedule

- If checked, whenever a new Vacation Request is opened, the "Hours per Day" displayed in the request will default to hours assigned to the employee's Work Schedule for that day of week.
  - If the Request's From Date is not the first day in an employee's Work Schedule, the "Hours per Day" will be blank until the To Date is entered.
  - Once the To Date is entered, the "Hours per Day" will be calculated using the employee's Work Schedule.
  - Hours per day will actually show the total number of working hours based on the date range entered.

Override Work Schedule 'Hours'

- If checked, the employee has the ability to overwrite the calculated "Hours per Day". For example:
  - If a multi-day request is made and the employee overrides the hours, the system consumes the hours per day up to the amount entered by the employee.
    - Scenario #1: An employee works 7 hours per day and makes a request for Tuesday to Thursday. The employee changes the 21 calculated hours to 17 hours. On approval, the system would apply 7 hours to Tuesday, 7 hours to Wednesday and 3 hours to Thursday.
    - Scenario #2: An employee works 7 hours per day and makes a request for Tuesday to Thursday. The employee changes the 21 calculated hours to 23 hours. On approval, the system would apply 7 hours to Tuesday, 7 hours to Wednesday and 9 hours to Thursday (2 hours greater than their Work Schedule hours).

Always Ignore Weekends (Overrides Application Settings)

- If checked, any Vacation Request date range that crosses over a weekend will ignore Work Schedule hours for Saturday or Sunday.
- Caution is advised prior to checking this option.

Always Ignore Statutory Holidays in Holiday Master (Overrides Application Settings)

- If checked, any Vacation Request date range that crosses over a Stat Holiday as defined in the Holiday Master will ignore Work Schedule hours for that day.
- Caution is advised prior to checking this option.

Rule Definitions - Time Requests:

Single Day Request Ignores Work Schedule

- If checked, a one-day request does not read the employee's Work Schedule. The "Hours per Day" comes from the employee's current Position.
- If the request is a multi-day request, the Work Schedule hours are calculated depending upon the "Reason" selected.
  - If the Reason entered is a <u>non-absent reason</u>, the system ignores the Work Schedule hours of the employee and uses the hours per day from the employee's current position. The employee should be able to override these hours. An example of this type of request would be a Time Request for Overtime.
  - If the Reason entered <u>is an absent reason</u>, the system checks the date to see if it matches the Work Schedule. An example of this type of request would be a Time Request for Sick.
    - A single day request ignores the Work Schedule regardless of the absent setting.
    - A multi day request checks the Work Schedule to calculate the total hours absent.

Default 'Hours' from Work Schedule

- Works the same as the Vacation Request rule.

Override Work Schedule 'Hours'

- Works the same as the Vacation Request rule.

Always Ignore Weekends (Overrides Application Settings)

- Works the same as the Vacation Request rule.

Always Ignore Statutory Holidays in Holiday Master (Overrides Application Settings)

- Works the same as the Vacation Request rule.