

# Web Modules Release 5.1 Documentation

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# Web Modules Release 5.1 Documentation

## Document Objective

The purpose of this document is to highlight changes made to info:HR for the web module 5.1 Release. This document is not a user's manual nor intended to be one. Updated ESS and Timesheets User Manuals will be available to download from our support page. An email notification will be sent when the updated user manuals are available.


This document does not address technical changes we've made to the application. Currently, Chrome and Internet Explorer are the browsers that can be used with these modules. Other browsers will be made available throughout the year.

## Application Settings

New Application Settings were added and the display interface changed.

### Application Settings

View Logs Test Mail Active Users Test Error Page View Logs By User Reset/Reload Work Table Clean up work table Large Requests Check Email Setup

 All ESS and Timesheet users need to be logged out of the application before making changes. The Network Service or the user account that's used in the application must have full rights to the physical folder under IIS for the settings on this page to be saved.

**Email Settings**

1. SMTP Server IP:	<input type="text" value="192.168.2.1"/>
2. SMTP Port:	<input type="text" value="25"/>
3. SMTP User ID:	<input type="text" value="99999"/>
4. SMTP User Password:	<input type="password" value=""/>
5. SSL:	<input type="text" value="Disabled"/>
6. Override InfoHR Email Setup:	<input type="text" value="Enabled"/>
7. Use One Email Account:	<input type="text" value="Disabled"/>
8. Stop ESS/Timesheet email:	<input type="text" value="No"/>

**Database Settings**

**Display Settings**

**Feature Settings**

- To open a section, click on the section bar. The current section will automatically close and the section selected will open.
- Only one section can be opened at a time.

## Support-Related Application Functions

[View Logs](#) [Test Mail](#) [Active Users](#) [Test Error Page](#) [View Logs By User](#) [Reset/Reload Work Table](#) [Clean up work table](#) [Large Requests](#) [Check Email Setup](#)

The above items are support functions and should only be selected when on a support call with HRSS. Each item performs a particular function. These functions are:

### View Logs

- Select either “Exception” or “Activity”. If “Activity” is selected, a date must be entered.
- Exception shows system errors, data errors, etc.
- Activity shows what activity each user did in the application.

### Test Email

- Defines the email program and confirms if the web server will be able to send emails. Select either “Test with Gmail” or “Your Server Email”.
- Enter parameters on the screen.
- Confirm that you received the email. If the email wasn’t received, check the settings entered.

### Active Users

- Shows the list of users logged in.
- This list may not be 100% accurate if users have exited the browser without logging out first. Please check the Activity Logs to see if there are any current activities occurring.

### Test Error Page

- This function is used for troubleshooting by HRSS customer support. Users will not need this function unless instructed by HRSS support.

### View Logs by User

- Similar to the View Logs except it limits the data to one User ID.

### Reset/Reload Work Table

- This table is part of the vacation and time request function that was added in version 4.2 to track user requests.
- This is a HRSS support tool only.

### Clean up Work Table

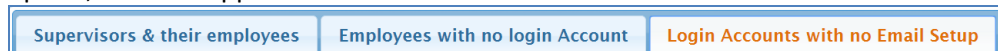
- This is a HRSS support tool only

### Large Requests

- Shows a list of requests that are 15 days duration or longer.

### Check Email Setup

- Confirms that info:HR is set up for email sending in ESS/Timesheets. By clicking on this option, a screen appears:



- First tab shows a list of all employees and supervisors.
- Second tab shows employees with no login access into info:HR or web modules.
- Third tab show employees with login access but missing Email Setup in info:HR.

## User-Related Application Functions

Below are the new settings for each section. Clients with custom code may have additional features not visible to all users.

▼ Email Settings	
8. Stop ESS/Timesheet email:	<input type="text" value="No"/>

- If this setting is set to “Yes”, no emails will be sent from ESS Vacation and Time Request, Request Authorization, Timesheet Submission and Timesheet Approval.
- The only reason to change the setting to “Yes” would be in a test environment where you don’t want employees and supervisors to get request emails that are not real.

▼ Display Settings	
42. Allowed Codes on Attendance:	<input type="text" value="FX-,FX+"/>

- Item 42 provides the ability to limited Attendance Reason Codes that can be used on the attendance screen when adding new attendance records.

▼ Feature Settings	
86. 30 Days Flex Expiry:	<input type="text" value="Disabled"/>
87. Exceptions Report Email:	<input type="text"/>
88. Detailed Request Email Subject Line:	<input type="text" value="Yes"/>

- If option 86 is set to Enabled, any Flex earned or taken will have a 30 days’ expiration date created for the record entered/approved. This option isn’t available to all clients. Contact HRSS for details.
- If option 87 may contain an email address of the individual who will be notified of any Flex earned or taken expiration that occurred. This option isn’t available to all clients. Contact HRSS for details.
- If option 88 is set to Yes, the email subject line will include requested date range and reason. Based on the above, this option may not always be number 88.

## General Information

Every page has been changed to a cleaner look and feel. Technical changes not documented have been completed too, making this version usable in both Internet Explorer and Chrome. Other browsers will be available at a later date.

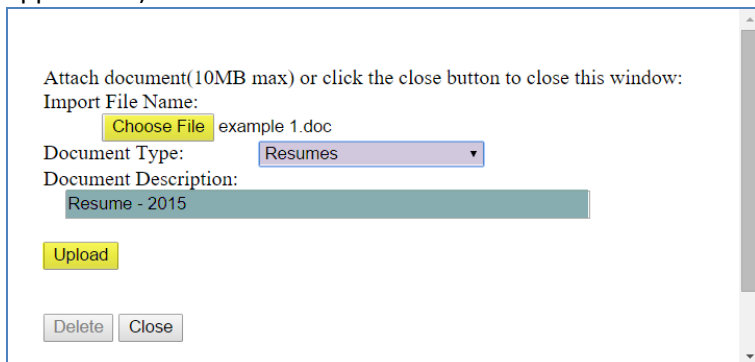
If a Supervisor has been terminated, the name will still appear when reviewing an approved or rejected Vacation and/or Time Request.

## Document Attachment

Throughout the application, there is the ability to import documents. Each imported document **must be assigned a Document Type**. The purpose of the Document Type is to group similar documents together. Within the client-server product, there will be a report available showing Document Types attached to each employee.

To attach a document to a specific page in ESS, please follow the instructions below:

Click on the **Import** button and a pop-up screen will appear (pop-up blocker must be turned off for the ESS application):



The screenshot shows a pop-up window titled "Attach document(10MB max) or click the close button to close this window:". It contains the following fields and buttons:

- Import File Name:** A text input field containing "example 1.doc" with a yellow "Choose File" button to its left.
- Document Type:** A dropdown menu with "Resumes" selected.
- Document Description:** A text input field containing "Resume - 2015".
- Buttons:** A yellow "Upload" button, and "Delete" and "Close" buttons at the bottom.

- Click on **Choose File**.
- Locate the file from either your local PC or a server drive. Select the file once it has been located.
- Select a **Document Type**.
  - The Document Type table entries are created in the client-server version of info:HR. If you cannot locate the appropriate Document Type, create the missing Document Type in info:HR before proceeding.
- Type in an English Description for this document.
- Click on **Upload** to upload the document into the document database.

To view an uploaded document, click on the **View** button. For example:



The screenshot shows a document entry labeled "Resume:" followed by two buttons: a blue "Import" button and an orange "View" button.

To replace an uploaded document, click on the **Import** button and follow the instructions above.

## Employee Basic Information

### Demographics

**Abbott, John (11026)**

PersonalOrganizationalMiscellaneous

Salutation	MR.	Payroll ID		Badge ID	11026
Last Name *	Abbott				
First Name *	John				
Middle Name					
Alias					
Address Line 1 *	125 Walnut St				
Address Line 2					
City *	Brentwood				
Province/State *	ONTARIO				
Postal Code/Zip Code *	L3E3E4				
Country	CANADA	Country of Employment	CANADA		
Email Address	johna@xyz.com				
S.I.N	452447725	S.S.N		Smoker	No
Marital Status	Single	Birth Date	10/20/1951		
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Original Hire	3/15/1989		
Home Telephone	416	6975589			
Telephone Number 2			Ext.		
Cellular Number	647	8965587			
Pager Number	905	4458875			

Save Reset

Resume: Import

- The page is broken into 3 tabs.
- First tab is personal information. Depending on settings of the Basic 1 screen on the security profile for the logged-in user, the majority of this data is maintainable.
- Unmaintainable data includes: SIN, SSN, Birth Date, Gender and Original Hire.

# Web Modules Release 5.1 Documentation

Abbott, John (11026)

**Personal**   **Organizational**   Miscellaneous

Department	<input type="text" value="FINANCE"/>	Department Effective Date	<input type="text"/>
G/L	<input type="text" value="OUTSIDE SALES"/>		
Division	<input type="text" value="CENTRAL CANADIAN BRANCH"/>	Division Effective Date	<input type="text" value="5/21/2014"/>
Location	<input type="text" value="BEVERLY HILLS"/>	Region	<input type="text" value="MANITOBA"/>
Admin By	<input type="text" value="10 digit Code"/>	Section	<input type="text" value="US"/>

- This is for informational purposes only. Employees cannot change their organizational structure.

Abbott, John (11026)

**Personal**   **Organizational**   **Miscellaneous**

Locker #	<input type="text"/>	Combination	<input type="text"/>
Driver License #	<input type="text"/>		
Type of Vehicle	<input type="text"/>		
Parking Permit #1	<input type="text"/>	Parking Permit #2	<input type="text"/>
License Plate #1	<input type="text"/>	License Plate #2	<input type="text"/>

Resume:

- Based on the security profile for the logged-in user, these data elements may be maintained by the employees.
- The Save button needs to be clicked after making the changes.

## Emergency Contacts

- No changes

## Dependents

- No changes

## Work History/Compensation

### Position

- Reporting Authority #4 was added.

### Salary

- No changes

### Performance

- Reporting Authority #4 was added.

### Other Earnings

- No changes



## Attendance/Entitlements

### Attendance/Absenteeism & Attendance History

Abbott, John (11026)

Reason select a reason From  To

---

...	Date	Reason	Hours	Incident	Emg. Leave	Seniority	Incenti
	7/19/2014	Bereavement	4	No	No	No	No
	7/18/2014	Lieu Earned	2	No	No	No	No
	7/18/2014	Vacation	8	No	No	No	No
	7/17/2014	Lieu Earned	2	No	No	No	No
	7/17/2014	Vacation	8	No	No	No	No
	7/16/2014	Vacation	8	No	No	No	No
	7/15/2014	Sick	1	No	No	No	No
	7/15/2014	Vacation	8	No	No	No	No
	7/14/2014	Lieu Earned	2	No	No	No	No

[New Attendance](#)

Reset

- New screen navigation similar to the Time Request screens.
- Above is a one line summary of the attendance record.
- This display can be filtered by Reason, Date Range or combination of Reason and Date Range. Click on the magnify icon to display records based on the filter entered.
- To add a new attendance record, click on “[New Attendance](#)”. Screen design was changed between 5.0 and 5.1.
- To view a record in detail, click on the pencil icon for the line you want to expand. Screen design was changed between 5.0 and 5.1.
- New detailed screen:

Abbott, John (11026)

Date

Reason select a reason

Hours

Supervisor

Charge Code

Shift

Region

Claim #

Machine number Select machine number

Incident   
  Seniority   
  Emg. Leave   
  Incentive

Comments

New
Save
Import
View Attachment
Back to List


# Web Modules Release 5.1 Documentation



## Calendar

Attendance ▾  Current Employee  All employee between July 01, 2014 and June 30, 2016  All employees - No date restrictions ?

today **October 2015** month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1 Abbott, John Regula	2 Abbott, John Regula	3
4 Abbott, John Lieu Ea	5 Abbott, John Regula	6 Abbott, John Regula	7 Abbott, John Regula	8 Abbott, John Regula	9 Abbott, John Regula	10
11	12 Abbott, John Regula	13 Abbott, John Regula	14 Abbott, John Regula	15 Abbott, John Regula	16 Abbott, John Regula	17
18	19 Abbott, John Regula Abbott, John Lieu Ta	20	21	22	23	24
25	26	27	28	29	30	31

- User-defined colour coding for attendance and request entries. The colour coding is stored in the Application Settings screen.
- Use the  to display the meaning of each colour shown on the calendar.

	Approved
	In Progress
	Rejected or Cancelled

## Vacation and Sick Overview

Abbott, John (11026)

	Vacation	Sick
Previous Year	152.00	40.00
Current Year	240.00	48.00
Taken to Date	120.00	80.00
Booked	24.00	
Total Taken	144.00	80.00
Outstanding	248.00	8.00
Date Range	1/1/2015 - 12/31/2015	1/1/2015 - 12/31/2015

Days

Hours

Both

Show Details of Vacation and Sick Time

Show vacations beyond the vacation date range

- New items added –
  - **Taken to Date** equals the total time taken up to “today’s” date.
  - **Booked** equals total time for any approved future-dated vacation time off. The future date cannot be greater than the ending date of the vacation date range.
  - **Both** shows both vacation/sick in hours and equivalent days. This option affects the entitlement and details screen. For example:

Current Year	240.00 hours / 30.00 Days	48.00 hours / 6.00 Days
<b>Vacation Time Taken</b>		<b>144.00 hours / 18.00 Days</b>
12/31/2015	Thursday	8.00 hours / 1.00 Days
12/30/2015	Wednesday	8.00 hours / 1.00 Days

## Reports

### Request Approval Report

Show	<input type="checkbox"/> Rejected	<input type="checkbox"/> Approved	<input type="checkbox"/> Unprocessed
	<input type="checkbox"/> Employee Comments	<input type="checkbox"/> Supervisor Comments	

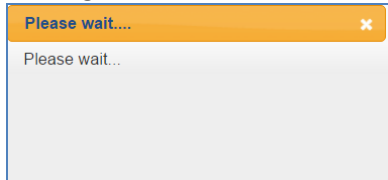
- Added two new options:
  - If **Employee Comments** is checked, the employee's request comments are printed on the report.
  - If **Supervisor Comments** is checked, the supervisor's approval/rejection comments are printed on the report.

## Timesheet Enhancements

### General Information

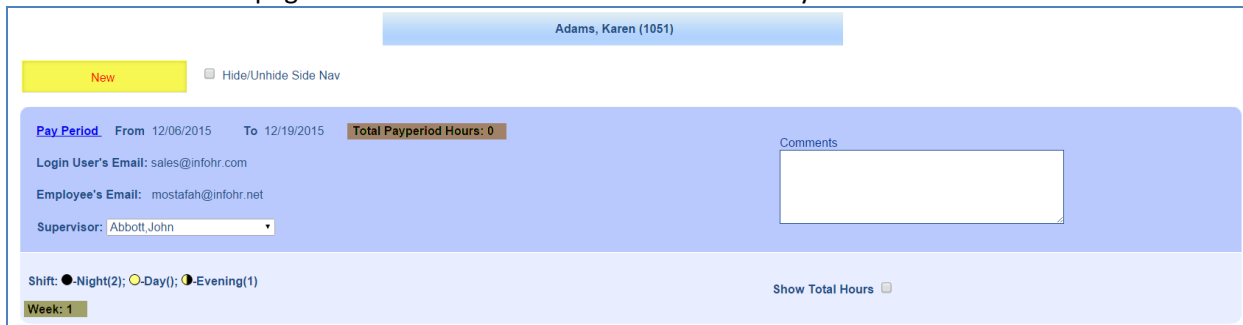
Every page has been changed to a cleaner look and feel. Technical changes not documented have been completed too, making this version usable in both Internet Explorer and Chrome. Other browsers will be available at a later date.

In order to avoid users accidentally clicking an option more than once, the application will display a message:



- The screen will be locked while this message is displayed.

The main Timesheet page has some new informational values. They are:



- The yellow highlighted area displays the status of the Timesheet.
- **Total Pay Period Hours** equals the total number of hours that have been entered into the Timesheet.
- If the pay period contains more than 1 week, the Week number is displayed below the Shift icons.

If a Supervisor has been terminated, the name will still appear when reviewing approved or rejected Timesheets.

### Edit Timesheet Templates

Display	Priority	Description	Repeat	Weekdays Only	Weekends Only	Requires Comments	Requires Charge Code	Max. Hours/Pay	Use Default Hours/Day	Used in Punch in	Requires Account Master	Requires Job Code	Disable Holidays	Read Only
<input type="checkbox"/>		Bereavement	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Two new items were added.
  - If checked, **Disable Holidays** prevents employees from entering hours against a statutory holiday.
  - If checked, **Read Only** prevents employees from entering hours against this Reason Code. **Disable Holidays** and **Read Only** can't both be checked for the same Reason Code.

# Web Modules Release 5.1 Documentation

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## Appendix – info:HR Changes after Release 5.1

Date	Description of Change
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