Spring 2005

The 1st Keystroke

Volume 1 Issue 1

HRtrax Newsletter

Inside this issue:

- Help is always available press the F1 key and read from over 700 Help Topics
- Function Keys are listed under Help > About HRtrax Function Keys
- Use the ever present 990 Tutorial company to practice or view setup examples
- List any of over 200 standard reports and templates, or send a report to Excel or other format options
- Create your own reports and save your report for use the next time you need this report - your employee data will be automatically refreshed with the most recent employee information

Warm Spring Greetings from the HRtrax Support Team

As can be seen by the Volume and Issue numbers, you are reading the first issue of the new HRtrax newsletter which we call *The 1st Keystroke.*

With each issue of *The 1st Keystroke,* our goal is to provide readers with important information about our Human Resource products and services. We believe this newsletter will become a valuable extension for customer support, and one more effective way that we can communicate with the HRtrax user community.

Each issue will contain a couple helpful hints and/or describe some of the lesser known features of HRtrax. When appropriate we will also include frequently asked questions that our support team has been fielding. Lastly, from time to time we will share with you some *futures*, new features and functions that are being tested for release with our next HRtrax version update.

This newsletter will be a quick read - limited to just the "meat and potatoes" of HRtrax and how our products and services can help you with the day to day task of keeping ahead of your workload.

Feedback is always welcomed. If you would like a particular subject featured, have a question or comment, simply email Support@Michaesoft-HRtrax.com and Yes, your Fax and phone calls are always welcomed.

Our always-ready-to-serve Web Site

We've re-designed our Web Site!

We have re-done our Web site, view our completely re-designed site using the address Michaelsoft-HRtrax.com Our goal is to make this Web site your "go-to" destination for HRtrax information.

Some of the most important improvements of this site includes; the ability to download the most recent versions of HRtrax, download forms, download demo versions, etc. We have also included our Help text as well as some product literature in the form of Word documents and PowerPoint slide-shows that are available to view or download. Check it out at Michaelsoft-HRtrax.com and feel free to comment on how we can make this site better and more useful.

Frequently Asked Questions

FAQ #1: I mistakenly terminated one of my employees, is there an easy way to erase all traces of this *accidental-termination*?

Answer: Yes, follow these two steps; **1)**bring up the "accidentally terminated" employee in the Payroll Related - Update (1of 7) screen and change the employee's Pay Status to reflect their actual status, **2)** go to the LOA/Termination screen, make sure the proper employee is displayed - advance the cursor to the Term Code field, Press the F9 key and answer Yes to the question "Are you sure you want to remove this employee's termination information?"

Please Note; if the "accidental termination" and the discovery/correction occur on different days, you will also want to visit the Payroll Related History Maintenance screen (use Tools **>** PR Related History Maintenance), make sure the proper employee is being displayed and that the history record for the "accidental termination" is being displayed - when it is, click-on the Delete button in the navigation line and respond with Yes to the question "Are you sure you want to delete this record?"

FAQ #2: Is there a quick way I can enter a re-hire?

Answer: Yes, follow these three steps; **1)** bring up the re-hired employee in the Payroll Related - Update (1of 7) screen, **2)** type Pay Status as RE, and enter the actual rehire date in the Pay Status Date field, also enter this same date in the Hire Date field as this is in-fact the employees new hire date (remember the I9 screen #3 will maintain the employees original hire date), **3)** type any additional changes needed such as wage, wage effective date, address, etc., and finally Save your entry.

When you save the record for a re-hire the screen label for the Hire Date field changes to now read *Rehire Date*. Also note that the RE pay status forces all payroll related information for this employee into the payroll capture file, this is important if for example this previously terminated employee has been purged from your payroll system.

After saving a RE record you may want to go back and change Pay Status code to reflect this employees actual Pay Status such as FT, PT, etc.

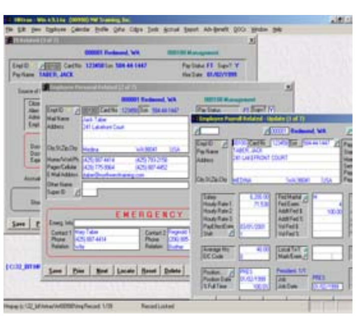
"The system responds with the report requestor setup for this employee - simply select the output destination, Screen, Printer or File"

Print Employee File Folder Inserts

Use these two quick methods for printing the contents of the *employee screen-set* which includes information from the 6 screens - Payroll Related, Personal, I9 Related, Dependents, Benefits and Recurring earnings/deductions;

1) To print this screen-set for one employee, bring up the employee in the Payroll Related - Update (1of 7) screen and press the F8 function key. The system responds with the report requestor setup for this employee - simply select the output destination, Screen, Printer or File.

2) Print screen-sets for a range of employees - using the menu option Report > Employee Reports > Employee File Folder Inserts To list screen-sets for all employees leave the "All Employees" set to "Y". To print a range of employees, set All Employees to "N" and use the Branch and Department options to enter the desired range. Finally select your desired sort option and output destination.



Need to view more than one screen as one display?

Sometimes you may find a need to view portions of multiple screen-panels as one display. Windows allows you tile open panels and view portions of each panel. To complement this feature, HRtrax allows more than one screen-panel to be open at the same time - generally you only see the most recently opened panel as this is the panel with *focus* and viewable. To view previously opened panels (those without *focus*), simply point your mouse to the panels title bar, hold down the left mouse button and drag this panel to a new location on your display, this *uncovers* a previously open panel - repeat this process to view portions of the next panel. You can always close all Windows using the menu selection Window > Close All Windows.

Upgrading to the most recent version of HRtrax

Each *HRtrax* Release or Service Pack contains important additional Features, Functions, and Fixes, plus some "not-so-important" features, functions and fixes. For all these reasons we encourage users to upgrade their system at a minimum of twice a year. As of this writing the current release is V 4.9.15c. If your active running version of HRtrax has not received a recent update - contact your HRtrax representative for the most recent version. Updates are available for download from our Web site, go to Michael-soft-HRtrax.com and scroll down the right side to the **Service Center**.

After applying the update, select **Help > What's New** to read a quick overview of new items included with this version.

"most users find it extremely helpful to know that time clock sensitive information is automatically being captured and sent to their T&A system"

HRtrax Time Clock/Time and Attendance Interfaces

Making good on the theme of *capturing the first keystroke* - HRtrax contains the ability to automatically capture employee records for use by various Time Clock/Time and Attendance systems - you no longer need to key the employee record again just to satisfy the needs of your Time Clock.

Of course not every Time Clock system has been setup and each time clock vendor may have more than one offering, or their product spec's may differ from what is presently contained within HRtrax. This is to say, you may need additional software to accommodate a specific time clock interface.

It's always best to contact your HRtrax representative for up-to-date information regarding your specific time clock interface needs. Gather up the time clock vendors name, model and software version ID of the product you will be using - this information is used to determine compatibility with your specific time and attendance system.

The following is a known *short list* of compatible Time & Attendance systems:

- Infotronics - Enterprise
- Infotronics - Professional
- JanTek
- Kronos
- NovaTime

This list grows as we respond to users needs, and its also known that some system will use the interface format from other systems - the point is, if you need to move your employee

information to a time clock system, check with your HRtrax representative for up-to-date compatibility information. Time Clock interface setup varies based on your specific needs. However, most users find it extremely helpful to know that time clock sensitive information is automatically being captured and sent to their T&A system.

Helpful Hint's 1 and 2 - both will save you time and money

Helpful Hint #1. Use the built-in calendar feature to enter items you want the system to warehouse and apply and add or change at sometime in the future. You can "calendar" any field within the employee screens for Payroll Related, Benefits, Recurring Earnings/Ded and even the LOA/Termination. Access the calendar function from the main menu bar by clicking the *Calendar* button and select a screen from the drop down options.

Each of the Calendar screen contains all the same information as the regular screen of the same name. One additional field labeled "Apply Date" has been added - use the Apply Date field to instruct HRtrax when you want to be reminded to launch your calendar entries. After entering the Apply Date, you can proceed to add and/or change any of the other fields and finally Save your entry. The system will identify each field scheduled for change by displaying a red star * next to the field label.

At user sign-on, the system will search to see if there are any Calendar Events dated for today or prior, and if the system finds any, you will receive a message stating "There are some Calendar Events with an apply date of today or prior... and continues with the friendly reminder to launch these calendared records using the Launch Calendar Updates menu option.

Helpful Hint #2. Each of the listed standard reports may be output to a file. File format options include TXT and the ever popular XLS Excel format, plus others. To output a report to a *file* - from within the report requestor enter your select and filter criteria, and then click-on the *File* button.

The system will respond with the "Output to File" screen; default values for the output path and name are displayed, however you can type over these defaults to locate your file in any valid path. Next click-on the button that contains the file format of your choice and then click the Ok button. Just that quickly you created a file that contains all the information as shown on the source report. Its not uncommon for some files to contain more data than the report is showing...

May God Continue to Bless America

HRtrax Case study

HRtrax Case Study #1 - Recently we were introduced to a Credit Union prospect that needed more HR support than they were receiving from ADP. The Credit Union had recently adopted the *Employer Benefit Contribution Fund* method as a means of controlling benefit costs.

In this new plan - each employee receives a flat monthly benefit contribution from the Credit Union (amount varies based on seniority), each employee may spend this contribution by purchasing Benefits - and the employee receives 50% of any "un-spent" funds in the form of recurring payments. Likewise any Benefit purchases that exceed the employers contribution must generate a recurring payroll deduction.

With ADP this entire process was manual and inaccurate - with HRtrax this entire process is automated and accurate to the Penny.

When benefit costs change, when an employee reaches a new seniority tier, even when the employee enrolls in new benefits or withdraws - HRtrax manages the payroll recurring earnings or deductions, all automatically.

HRtrax Case Study #2 - a HRtrax partner had presented a large not-for-profit organization with a Payroll Services proposal that also included HRtrax. The Controller and Human Resource manager agreed that deliverables included in this proposal exceeded what they were receiving from ADP. However, they had been with ADP for years and were reluctant to leave ADP and all their employee history behind.

Our solution - create a report in ADP for all the meaningful employee history and output as a file for import into HRtrax.

We helped our partner win this business when we showed this non-profit that we could bring forward their many years of ADP employee history into HRtrax. Now satisfied that they were not going to leave behind valuable employee history, we were able to quickly train their users, plus setup and implement functions within HRtrax that were not available with ADP - we helped turn this opportunity into a Win-Win for all partners.

If you are not already using HRtrax as your Human Resource assistant, call or email us to schedule a demonstration or the name of a distributor near you.

HRtrax Newsletter

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