



Dresser & Associates

HR, Payroll & Talent Management Solutions

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Newsletter for Sage HRMS

Alerts & Workflow: Are You Missing The Boat?



Alerting and workflow capabilities are so valuable to the HR function that we think every HR organization, large or small, should be using them. In this article we discuss the issues alerts and workflows can solve, and review the powerful capabilities of Sage Alerts & Workflow.

How Alerts And Workflow Help

Your HR department can become more proactive and actually save the organization money with the effective use of alerts and workflows. Here we provide just one example in each major area of HR responsibility. We're sure you can think of many more.

Employee Hiring, Absenteeism & Termination

Do you have employees who are excessively absent or tardy? If you could proactively identify when an employee is approaching or has exceeded their allotted sick days or is consistently tardy, how much money could you save your organization in lost productivity?

HR Policy Violations & Workplace Injuries

Do you ever become aware of a required HR task that should have happened – but didn't – such as a time card not submitted, a drug test not taken, or a training course not

completed? How much time and money could be saved if you had a system that automatically monitored for activity due dates, and sent corresponding reminders?

HR Administrative Activities

How much time do you spend generating and delivering standard forms and documents such as performance review forms, benefit enrollment forms, or vacation request forms? How much time and money could be saved if all of your standard forms and documents ("New Hire" packets, performance appraisals, benefits forms, etc.) could be auto-generated and auto-delivered exactly when your staff needs them?

Training

Has an employee ever been decertified because the recertification deadline was missed? How much time do you spend checking which employees have completed training courses? How much time and money could be saved by automatically notifying employees and their supervisors of required coursework, upcoming training sessions, and certifications coming up for renewal?

Benefits

Have employees ever missed an open enrollment period because they were unaware of (or ignored) the deadline?

In the news...

The Sage Inspire Tour is in full swing. This one-day event travels to your area and offers informative sessions about your favorite Sage products, presentations by business leaders and Sage experts about common business challenges and solutions, and the opportunity to network with your peers to share ideas. The tour will be in New York on April 21st and Toronto on May 19th. [Click here](#) for more information.

Alerts & Workflow

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Have you ever missed requested changes to an employee's benefits or benefits effective dates? How much time (and money) could be saved if you automatically reminded employees' supervisors of upcoming benefit enrollment periods, and could automatically be informed when an employee's benefits have been changed or they are eligible for new benefits?

The Solution

With Sage Alerts & Workflow, you will be able to solve all of the issues discussed above, smoothly and easily. Think of it as a smoke detector for your department. Alerts & Workflow is your invisible assistant; it automatically identifies and responds to critical business conditions that – left unchecked – can jeopardize the profitability of your business and the productivity of your HR team. Alerts & Workflow monitors your Sage HRMS data for any business conditions that are critical to the success of your organization. And you can notify your staff via more than just email. Alerts & Workflow also sends alerts via fax, SMS, pager, Instant Message, Twitter, and dynamic dashboard.

Automate Tasks

More than just reminders, Alerts & Workflow also allows you to streamline your operations by automating many tasks you currently do manually. The software can automatically produce and deliver employment application forms, review forms, and other standard forms and documents. Alerts & Workflow even extends to updating Sage applications with pertinent details and activities, such

as updating a new pay rate after a performance review.

BI-Strength Analysis

Sometimes the most important business information isn't what has happened, but what hasn't happened. Alerts & Workflow performs advanced analyses such as employees who have missed 'x' days, or who have not completed benefits enrollment by 'x' date. And Alerts & Workflow is an enterprise-wide monitoring and response solution; this includes the ability to identify conditions between various business applications (such as HRMS and ERP), as well as the ability to monitor the contents of incoming email messages, web form submissions, and even conditions within your operating system.

Preconfigured Events

Sage HRMS Alerts & Workflow comes with an extensive collection of over 50 preconfigured Alert Events and Alert Condition "Triggers". Here we provide just a few examples.

Benefit Triggers:

- Changes Made Today
- Cobra Continuation
- Eligibility Starts in 'x' Days
- Expires Today
- Expires in 'x' Days

Employee Event Triggers:

- Events; Scheduled within the Next 'x' Days

Leave of Absence Triggers:

- Starting Today
- Starting or ending in < 'x' Days
- Chart; Absences Hours per Employee

Payroll Triggers:

- Checks On Demand > 'x' Dollars

General Employee Triggers:

- Reviews are Overdue
- Hire Date Anniversary
- Birthday Greeting
- Certification & Training Triggers:
- Certification Expires in 'x' Days
- Training; Class Completed

With the Alerts & Workflow design modules you can fully customize all of the preconfigured events, as well as create an unlimited number of additional events of your own.

Automate Report Delivery

Alerts & Workflow can also help with the production and delivery of the analytical reports your organization relies on. You can automatically generate and deliver an unlimited number of Crystal Reports. Whether daily, weekly, monthly, or based on any other schedule, Alerts & Workflow generates and delivers these reports in any format you require. And you need no longer scan through voluminous reports looking for the occasional "hiccup" (or exception). Alerts & Workflow's reports can be "exception-based" so the reports that are generated and delivered to you show only the information that requires your immediate attention.

Easy To Implement And Use

Alerts & Workflow downloads in less than five minutes and installs in less than 10. And importantly, Alerts & Workflow is wizard-driven, requiring no technical knowledge to use.

We can help you implement the alerts you need with the appropriate thresholds. Please call us for more information or a demonstration. ☆

Keep Your Company Organized With OrgPlus

Organizational charts are important ways you can help your employees better understand your company's structure, as well as everyone's role in achieving organizational objectives. Sage OrgPlus® by Insperty is an effective tool to easily assess your current organizational structure and respond to your company's changing needs. Let's learn more.

Sage OrgPlus includes a variety of features, such as data management, organizational planning, and intuitive chart creation and formatting. You can publish your charts directly to a website or your intranet and refresh the data on a predefined schedule of your choosing with advanced publishing capabilities.

Strategize For Different Business Scenarios

With Sage OrgPlus, employees and managers have easy access to up-to-date organizational charts that give them the information they need to understand your business and plan for the future. Managers can strategize for different business scenarios, share the chart data, and measure their impact using built-in formulas to measure headcount, salaries, or other

important planning information. Additionally, you can easily communicate your organizational structure to employees and centralize employee contact information.

Easily Customize Charts

Sage OrgPlus also includes a variety of formatting tools that allow you to quickly create organizational charts that can be published in various Microsoft Word, HTML, or navigable PDF and PowerPoint formats. With dozens of predefined chart templates and drag-and-drop functionality, you can easily customize organizational charts to meet your company's unique needs. And you can further modify them with an array of design tools and visual effects and create global views of your organization.

Sage OrgPlus Benefits

Here's a high level view of the robust capabilities of this organization charting software:

- Automatically and quickly create organizational charts by linking to your Sage HRMS database.
- Dynamically format your data to bring attention to specific

information for a more complete view of your data.

- Publish your charts in a variety of formats, including Microsoft PowerPoint, Microsoft Word, Adobe Acrobat PDF, HTML, or post them directly to the web or your company intranet.
- Refresh, distribute, and publish your chart data on a predefined schedule of your choosing to ensure that your employees always have the most up-to-date information.
- Create "what-if" business scenarios to measure their impact.
- Perform spreadsheet functions on data in chart boxes and insert links to other files.
- Customize charts with one of 36 predefined templates, import pictures, create card views, and include fill effects such as gradients and textures.
- Create multiple rows under one manager with multicolumn chart styles, import and manipulate pictures to boxes and backgrounds, and group boxes within charts.

Please call us for a demonstration of this effective planning tool. ☆

Contact Us:

Dresser & Associates, Inc.
243 US Route 1
Scarborough, ME 04074
(207) 885-0809
(866) 885-7212

info@dresserassociates.com
www.dresserassociates.com

Regional offices:

Atlanta, GA
(678) 772-7099

Lancaster, PA
(866) 885-7212

Clearwater, FL
(727) 366-6922

Baltimore, MD
(443) 829-3735



Effective Design, Implementation & Support to meet your HRMS needs