Open4 System Overview

Your employees are your organization's single most important resource, yet collecting, managing, and reporting their information are major headaches. You could spend a fortune and take months or years to implement a new system, only to find that it doesn't fit.

OPEN4® is specifically designed to give you control over how your HRIS System functions. Because HRIS/PR is our only business, we've designed a system that is flexible, affordable, and rich in functionality – yet it can be implemented in a reasonable timeframe. Following, we list some of the features to compare when considering a new HRIS.

HR & PAYROLL APPLICATIONS

• While Payroll and Human Resources are available individually, they are fully integrated when implemented together

• Interface to ADP's PC Payroll for Windows® also available

• Supports multiple companies, divisions, branches, departments, and locations

• Context-sensitive online help available throughout the system

• Unlimited notes can be associated with each information category record

• Date alerts. Every date can be set to trigger an alert when date approaches

• Future processing of new employees, benefits, job transfers and pay changes

SECURITY

• Extensive multi-level security is honored by OPEN4®'s query and report writer (Report writer is an add-on module)

• Users may be assigned specific "home" menus containing only authorized items

• Top executives can be designated as "confidential", thereby limiting access to specific authorized individuals only

• Work group security allows control of access to information categories

• Security can control access to sensitive data fields (i.e., annual salary amount)

• Access can be limited to specific companies, divisions, branches, or departments

• Managers can be granted authority to see data on employees working in their departments – but not employees in other departments

• Managers can be granted authority to see selected data without allowing update

• System logs any change to system, company, tax, or employee data – showing who changed what and when

• System maintains an event log which keeps a record of each process started – showing who did what and when

SELF-SERVICE

•Optional employee self-service can be based on kiosk, intranet, or internet access

•Employee's check history, vacation time available, and W-4 status available

•Benefits open enrollment supported as well as current benefit information

•Employee's training history, courses currently available, and enrollment applications supported

•Company directory and employee handbook can be displayed

•Employee can update address, emergency contacts, and submit suggestions

•Includes scrolling message bar for company news and events

•Automatic timeout after no activity protects employee's confidential information

TECHNICAL

•Developed using 32-bit object-oriented 4th generation language (Progress®)

•Supports multiple companies, divisions, branches and departments

•50+ individual information categories already set up and ready to use

•End user can create new categories and screens, *without programming (Requires screen editor – optional add-on module)*

•End user can define additional new data fields, *without programming (screen editor is an optional add-on module)*

•Source code is available (except report writer)

•Modifications and customization are available directly from developer

•Integrates with Microsoft Word® and Excel®

OPTIONAL ADD-ON MODULES

•"A la carte" pricing is one reason that OPEN4 is so affordable. You can start out with only the modules you need, and add any others later, if ever. Here are some add-on products that may be critical to your business operation:

• FMLA – this product provides FMLA functionality A to Z, beginning with eligibility and certification/re-certification, generation of paperwork, and leave tracking, including leave taken with concurrent PTO and intermittent leave. Eligibility is computed if the base Payroll System is installed

• TRAINING – if keeping up with training – what's required, what pre-requisites are needed, what's late, etc. is a big headache - you'll want to look at this module

• THIRD-PARTY SICK – gives you the ability to record sick-pay paid to employees from your TPA, both taxable and non-taxable, and computation of your company's tax liabilities

• REPORT WRITER – even though there are over 200 reports in the 'canned system', your organization's unique requirements demand this tool

• SCREEN EDITOR/DATA DICTIONARY – if you need complete flexibility within your system, this product is invaluable. You will have the ability to build new data fields, new screens, even information categories – *without programming*

OTHER REQUIREMENTS

•Relax - OPEN4 doesn't require a database administrator or any other heavy lifting. Your database almost runs by itself, with only normal data backup functions, and an occasional software update. Just ask our users – they will tell you how maintenance free this system truly is.

Human Resources

Dealing with the volume of diverse information that must be maintained for your employees, and at the same time, complying with the complex, ever-changing governmental regulations doesn't leave much time for other HR functions that are critical to your firm's future success.

*You need a system that minimizes the effort required to manage this information. And more importantly, a system that lets you extract the data in meaningful ways, both today and as your business evolves and requirements change. You need **OPEN4®**, the most powerful, flexible, and affordable HRIS system available today!*

HUMAN RESOURCES GENERAL

•Optional interface to ADP's PC Payroll for Windows®

•EEO-1, EEO-4, OSHA, and VETS-100 included

•Affirmative action reports (AAP) included

•Absence and vacation records automatically created when OPEN4® payroll is used

•Calendar view of absences by month or calendar year

•Mass change utility updates all appropriate employees when supervisor changes

•Performance review ratings, with review matrixes tied to jobs, automatic generation of probationary and on-going reviews

•Wide variety of reports, including absence analysis, vacation liability report, seniority reports, turnover, and head count analysis

BENEFITS

•All benefit changes are automatically retained in history

•Future dating of benefit changes is supported

•Benefit groups can be made up of salaried, hourly, union employees, etc.

•Benefit groups are assigned specific benefits, with a core group available to all

•Benefit rate tables provide flexibility in building rates, including age-based, male/female and/or smoker/non-smoker

•Can define wait period for each benefit eligibility

•Checks age limits for employee/spouse, dependent (non-student) and student dependent

•Enrollment options include enrolling a single employee in all eligible benefits, enrolling multiple employees in a benefit, or adding a new benefit for all employees

•Also accepts input from OPEN4® *e*SS module for benefit changes during open enrollment period

•Statement of benefits is provided for selected employee or all employees

•Automatically creates/maintains companion payroll deductions in OPEN4® payroll

•COBRA and HIPAA letters provided and may be edited with Microsoft Word®

COMPENSATION

•A history of all pay changes is automatically retained

•Mass pay changes and future dating of pay changes supported

•Compensation tables support unlimited pay tables, grades, & steps

•Automatic periodic increases and license/certificate premium pay supported

•Employee pay maintained in hourly, daily, pay period, monthly & annual formats

•Both Percent of Midpoint and Position in Range values automatically maintained

APPLICANT PROCESSING

•Customizable applicant entry process captures demographic data, positions applied for, skills, etc.

•Requisitions tie available jobs back to applicants

•Event tracking captures applications, interviews, test, hires, etc.

•Interviews, Education, Prior Employers are other categories of information that can be captured

•Reporting includes applicant flow, job vacancies, recruitment source, and more

WORK ADMINISTRATION

•A history of all job changes is automatically retained

•Future dating of job changes is supported

•A history of all transfers between division, branch, and department is retained

•Future dating of transfers is supported

•Position control is supported

•Hierarchical view of who reports to whom is available when position control is in effect

•May feed OrgPlus® (or other PC-based systems) for organizational charts when position control is in effect

•Job posting description is resident in each job record

•Real-time display of incumbents and vacancies available for each job

•Required skills, education, and licenses are kept for each job

•Job training requirements are maintained for each job, including prerequisites

•Time of service records are kept for both employee's current job and service history

•Job vacancy report

•Future jobs and future transfers reports

•Employee job assignment reports by division/branch/department, by employee number, name or job sequence

•Seniority reports by name, hire date, department, or job sequence

Open4

GTR

GTR Data Inc.
For more information:
www.gtrdata.com   gtr@gtrdata.com
Telephone: 514-738-6680 Fax: 514-738-8538

Open4® Payroll

Today's Payroll Professionals are faced with ever-increasing challenges – complying with statutory regulations, dealing with the complexities of 401(k) and cafeteria plans, child support orders and garnishments, and all the while, getting the payroll out accurately and on time.

*You need a system that handles those requirements and more, a reliable system that's easy to use and bulletproof, a system that allows you to focus on the important tasks of the day, one that's powerful, flexible, and proven – You need **OPEN4®**.*

GENERAL

•System includes automated checklists to control multi-step processes like payroll processing or end of year

•Check history retains complete check stub details for all checks

•System supports automatic vacation, sick, holiday, and personal accruals

•Employee transfers between divisions, branches, and departments take seconds

•System stores history of time off accrued or taken for each employee

•Automatic reversal of voided checks and four types of manual checks provided

•Check reconciliation is included

•Third-party check processing is included, with support for ACH transactions

•Flex Spending sub-system is also available, for administration of non-reimbursable health and dependent care transactions

•Certified payroll is supported for government contractors

•Payroll interfaces with many time and attendance and general ledger systems, and custom interfacing is available

•Options to out-source tax filing, check/direct deposit processing/printing, W2's, etc.

HOURS & EARNINGS

•System offers all of the usual pay types and frequencies, but in addition:

•Handles unlimited number of hours and earnings types

•Support for 'over 50K' group term life, non-cash awards, gifts, moving expenses, etc.

•Automatic salaried pay without input (only exceptions entered)

•Certain hours types, such as vacation or sick, can automatically reduce auto-pay hours and can create associated absence vacation records

•Recurring items (i.e., auto allowance), gross-ups, and retroactive pay supported

•Accepts hours entered via Excel® spreadsheet or time & Attendance systems

•Can generate mass transactions for bonuses, holiday pay, etc.

•Accommodates unlimited number of shifts with automatic payment of premiums

•Supports FLSA overtime rate calculation

•Keeps detailed and summary totals for all hours and earnings – by employee, then rolled up to department, branch, division, and company

•System stores history of hours and earnings transactions paid for each employee

DEDUCTIONS

•Robust deduction support handles all the deductions you'll ever need, including:

•Garnishments, child support, tax levies, 401(k) loan repayments, etc.

•Tax-sheltered deductions such as: S125 cafeteria plans, 401(a), 401(k), 403(b), 457

•Includes flex spending (FSA medical & dependent care)

•Can accommodate up to 3 tiers of company matching for 401(k)

•Choose from 36 deduction calculation methods

•Unlimited number of direct deposits for an employee

•Support for complex union requirements, like dues calculations, employer-paid benefits, and accruals

•All deductions offer user-specified take sequence, start/stop dates, and multiple arrears options

•Deductions may specify global amounts which apply to all employees

•Deductions can produce third-party checks to pay child support and garnishment court orders and other vendors

•Each deduction captures the most comprehensive set of totals available, including 37 individual totals for each employee deduction

TAXING

•Unlimited individual tax records maintained for each tax jurisdiction in which employee worked – for accurate individual state tax reporting

•Handles all 50 states' taxing (including income withholding and unemployment reciprocity) as well as local taxing

•Supports aggregate method taxing of supplemental pay (as well as fixed percent)

•Includes new hire reporting and required magnetic media reporting

•Includes state quarterly reporting, as well as 940, 941, 943, and W-2s

•Federal, State, & local tax updates provided as part of maintenance agreement
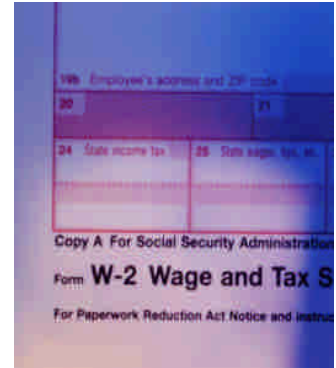
REPORTING

•Payroll totals recap summarizes selected multiple payrolls on one report

•Check history print includes options for detail or summary report, for a single employee, one department, branch or division, selected date range

•Tax balancing aids including tax verification report, federal tax wage analysis, and tax distribution summary

•Time accrued report shows all PTO time and the company's current accrued liability cost

•Projected payroll cost by department and salary increase projections provide "what if" reporting

•Pay change history reporting

•System audit reports including employee, tax, events, and company audit listing

Open4 eSS

Employee Self-Service

Deploying employee self-service is a major new trend in HRIS technology, with a return on investment noted almost immediately. Most systems, however, are prohibitively expensive and difficult to implement.

*Not so with **OPEN4®**! The eSS System is affordable and can be implemented quickly – improving employee satisfaction by giving them access to their information – easing your workload to let you focus on more critical tasks.*

eSS GENERAL

- Internet, Intranet, or kiosk access
- Directly accesses the OPEN4® database
- Audit log reflects all changes made
- Designed to be extremely easy to use – even people with little or no computer skills can navigate the system with minimal effort
- Customizable desktop, using your own logo and desktop design
- A 'What's New' scrolling message bar is included, to post company news and events, i.e. company picnic, safety stats, and more
- Automatic log-off if the System if left inactive for a pre-established time period
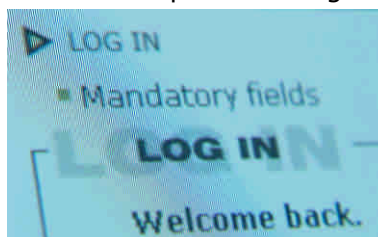
TRAINING

- Displays courses already taken
- Displays courses required, but not yet taken, or required repeat courses
- Displays full course catalog, including course prerequisites
- Request enrollment in a class or, if already enrolled in a class, request a drop

BENEFITS

- Displays current benefits, enrollment options, and dependents/beneficiaries
- Dependent/beneficiary updates, additions
- Life event changes
- Selection of eligible benefits during open enrollment periods
- View employee and company contribution amounts
- Display of vacation and other paid-time-off taken and available

OTHER FUNCTIONS

- Display check history in a check format, including all pay, tax, and deduction detail
- Address and telephone changes
- Emergency contact changes and additions
- Display direct deposit account information
- Display current W-4 status
- Company Directory; employee handbook
- Suggestion Box
- And much, much more…

Open4 Choices

Any Way You Want It!

Our full range of capabilities let you focus on your needs, not whether the HRIS system will handle them. You're free to consider the ways that OPEN4 could improve productivity in your organization. And you're free to decide on the services and deployment options that are the best fit for your firm.

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*Think of **OPEN4®** like an ice cream parlor – do you want a cup or a cone? Chocolate, vanilla, or strawberry ice cream? Hot fudge or caramel topping? With **OPEN4**®, our flexibility lets you tailor the system to fit your operation – not the other way around.*

IN-HOUSE CHOICES

This option is a familiar one – you house the computer and software in your facility. You retain TOTAL CONTROL of your payroll and employee information. You won't have to be concerned about Internet worms or viruses, connection speed, unanticipated fees, or strangers browsing through your confidential pay information. You pay a one-time license for the software, and an annual maintenance fee for support, updates, and enhancements. You're not at the mercy of an outsourcer's processing schedule – process your payroll when it's convenient. And remember that your employees have to do the "heavy lifting" anyway, (entering time worked and changes to personal data) regardless of who computes gross-to-net and prints the check.

RENTAL

•You've got the hardware in place to run the system, but are faced with a limited budget. Why not rent the software, with an option to buy down the road? Again, you can pick and choose the services you need on top of the rental. No capital expenditure.

IN-HOUSE HRIS W/ADP INTERFACE

•You have the ADP PC Payroll for Windows® and management won't let you bring payroll in-house. But, your HR side is sadly lacking. The answer? Replace it with the OPEN4 Human Resources module – a full-featured HRIS that interfaces to the ADP Payroll for no duplication of data.

What makes OPEN4® unique? Here are a few reasons.

1. **True Integration**. Human Resources, Payroll, and Report Writer were designed from the beginning as a *unified system*. All OPEN4 modules reside in the same database, were developed with the same language and toolset, and have a consistent look and feel.

   When you set up security, all systems (including the report writer) honor the instructions.   When you write a report, you can intermix data from human resources or payroll –   seamlessly. Self-Service displays information gathered from all modules to present a   complete integrated picture to your employee.

2. **Real Customization**. Another important part of OPEN4 is the screen editor. Other systems provide you with a few "user" fields in a fixed location and (sometimes) let you update the   labels. That's what they call "customization". Not so with OPEN4.

   Our screen editor allows you to create **new database tables, new screens and tabs, and new data fields**. Any power user can do this - it doesn't require a programmer or an expensive "consultant". And OPEN4's truly integrated system makes your new data *instantly*   available throughout the system, and your new addition(s) will also honor your security   instructions.

3. **Employee Information**. OPEN4 places the employee at the center of an information universe with almost 50 pre-defined information categories. Suppose management needs to   know "everything" about an employee – and they want it NOW. How long would it take with   your current system? Days?

   With OPEN4, you simply run a Personal Event Profile. You can print an employee's entire employment history in *seconds*. Think about it – there could be 20 years worth of information - every pay change, job change, benefit change, all absences, all training, every test, the transfers, disciplinary actions, reviews and more, all together on a single report in   chronological sequence. No need to visit a dozen screens or more, writing down information   as you go. It's invaluable for succession planning, promotion consideration, possible   disciplinary action, or in preparation for a lawsuit. This item alone carries a hefty ROI (return   on investment).

4. **Unsurpassed Product Support**. All sales reps say that their support is "unsurpassed". You have a right to be skeptical – after all, "let the buyer beware". The only way to judge the   accuracy of that statement is to ask real users. We're so confident, we automatically send out a list of about *30 references* with our sales packet - no one else does that. We encourage   you to call any/all of them and inquire about our product and our support – and no, we're not paying them.

5. **Pricing**. We're consistently priced at the low end of our competition – sometimes a fraction of their price. Compare capabilities and price and we'll be on your "short list".

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For more information:
www.gtrdata.com   gtr@gtrdata.com
**Telephone: 514-738-6680 Fax: 514-738-8538**

ADP INTERFACE

Unfortunately, many organizations currently outsourcing payroll to ADP don't yet have a REAL human resources system – or at least one that is properly interfaced. One of the unavoidable side effects of that environment is redundant entry. Entering data more than once is not only a waste of time – it invites errors.

OPEN4® eliminates redundant entry by using a two-way interchange with the payroll system so you only enter information once. Now, you can have the most flexible, powerful HRIS available directly linked to your outsourced ADP payroll.

GENERAL

•This interface is designed to be very flexible regarding the data fields passed to ADP from the OPEN4 HRIS. A simple fields list is provided that contains all of the fields that can be interfaced. This fields list has the ADP field name, the OPEN4 source for that field, and a data conversion table, if applicable. You decide which fields you want to pass to ADP.

•Each person in OPEN4 has two categories related to the ADP System. One is the ADP category that contains the ADP Company Code and Employee File Number. The other contains the transactions that have been generated to feed ADP.

•These transactions can be retained for history or purged on demand. The extracted data follows the guidelines documented in the *ADP PC/Payroll for Windows Data Exchange Guide.*
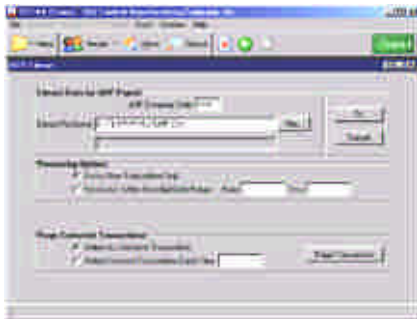
DATA EXTRACT

•The data captured for the interface is triggered by certain events and by general maintenance on the employee's record:

Events
- •New Hire
- •Hire an Applicant
- •Terminate Employee
- •Job Change
- •Pay Change
- •Benefit Change
- •Transfer Employee

Maintenance
- •Basic Employee
- •Emergency Information
- •Employee Service
- •Employee Job Change
- •Employee Pay Change
- •Employee Benefits
- •ADP Interface Information

INTERFACE FROM ADP: CHECK HISTORY

•Additionally, OPEN4 accepts Check History information from the ADP System for inquiry and reporting purposes. The data extracted from ADP is extracted via *ReportSmith*. This extract can be for a single pay period or multiples. So, no more need to look at two different systems for information!

Open4 Add On Modules

Simply put, the marketplace has determined that pricing options are necessary. In tough economic times, organizations need more flexibility in managing their financial resources. Separately priced modules allow implementation of a basic HR System when it's needed with add-on modules to be added later.

> *For example, some organizations might not view training as a necessity and wouldn't want its value to inflate the price of their HR System. For others, training is a critical part of their operation, and they wouldn't select an HRIS without a robust training module.*

FMLA

Determining eligibility, generating required documents, and tracking FMLA certifications and leave used can be a daunting task, even for the most "seasoned" HRIS professional. This key module:

•Supports all statutory techniques for calculating eligibility

•Calculates FMLA hours worked for eligibility (Calculation requires the OPEN4 Payroll module)

•Tracks certification and re-certifications

•The system generates standard Dept. of Labor FMLA forms including the WH-1420, WH-380, and WH-381

• Provides for leave tracking, including any intermittent hours taken

•Your own company-specific forms referencing policies can be added to the document set for click and print simplicity

•Reports include FMLA absences for all employees or for a selected employee, certifications due for return, certifications expiring, and more

•Provides for entry and retention of outside-of-system time that impacts eligibility (military service, part-time work, etc.)

•Provides a calendar view of all FMLA time in a month or year format – optionally, vacation and sick time can be included on the display

•A complete history of leave taken is retained – each occurrence is captured in an individual record regardless of the length of time taken

TRAINING

This module makes it easy to track your employees' on-going training and certification/re-certification requirements, schedule courses and instructors based on those requirements, and record training history.

•All employee training is retained in history

•Specific training requirements can be defined for jobs

•Course catalog contains course information and includes prerequisites

•Class records reflect future, current, and past enrollment information

•Instructor records maintain a list of courses for which instructor is qualified

•Calendar views display class dates, instructor schedules, etc.

•Class confirmations, rosters, etc. can be e-mailed or printed

•A complete set of 19 training reports are provided, including: training history & training requirements by course or employee, training past due, class rosters (both open and completed classes), class cost reports, and more

•eSS (employee self-service) supports display of an individual's training history, future training required, request for enrollment, request for drop, schedule of upcoming classes, etc.

•Costs are accumulated for each class and distributed out to the students attending the class thus capturing the training received by an employee that was paid for by the employer

•(This module requires licensing of the base Human Resources System)

REPORT WRITER

There are over 300 "canned" reports in OPEN4, over 200 written with the Report Writer. This add-on module lets your users make changes to those reports or write new ones "from scratch".

- OPEN4's report writer is designed for end users – no technical skills are required
- Any new data fields and tables you've added to OPEN4 are immediately accessible by the Report Writer
- All report writer reports can be printed, viewed on the screen, sent to a text file, or sent to Microsoft Excel®.
- The "Where" function allows filtering by selected data comparisons, for example: "transactions within a date range" or "active employees only"
- The "Ask For" function provides a way for the person running the report to enter variable data that is used by the report, i.e., dates in a date range
- The system also supports complex arithmetic expressions
- Pre-defined functions, such as person name format or report header formats, make it easy and quick to build a new report
- Sort options, totaling options, report formatting, and page and line breaks are all supported
- All database tables' relationships are already pre-defined – no need to agonize over setting up a new relationship as in other report writers
- Normally compiled on-the-fly when executed, reports can be pre-compiled to run even faster, and can be placed on OPEN4's menu for direct execution
- Edit security can be set on a report thereby preventing changes to that report by unauthorized personnel

SCREEN EDITOR

For a company with specialized requirements that are normally addressed with "custom" programming, this module may be your answer. If you need new data fields, or even a brand-new information record, take a look at the Screen Editor.

- Add new data fields in existing categories, without programmer assistance
- Build new categories and screens, accessible immediately by the OPEN4 Report Writer without programming – for example, a company that provides uniforms to employees can create a "Uniform" category and store data such as size, quantity issued, date of issue, etc.
- Pass data against a code table for validation
- Change field labels, re-position data on a screen, and more
- Advanced features include writing code imbedded in a screen for more complex computations, placing widgets (screen buttons, etc.) on a screen

THIRD-PARTY SICK

If you use a third-party administrator to pay sick leave earnings to your employees, you are still liable for employer taxes. This module provides for entry of this sick pay, creates the liability general ledger journal entries and reports, and updates the employee's W-2 information.

- Allows for entry of employees' sick pay from a third-party payer
- Calculates employer liabilities for taxes and insurance
- Creates general ledger journal entry files for these liabilities
- Updates information for quarterly reports and W-2