Software Release Notes

OnePoint Human Capital Management

February 2021 R73

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Supported Operating Systems and Browsers

The table below shows currently supported operating systems and browsers.

NOTE: The list shown in the table below are operating systems we support, though they may not be actively tested.

Platform	OS Version		Browser	Version
Desktop			Internet Explorer	11
Windows	10		Microsoft Edge	latest
Mac	10.13.4 (High Sierra)		Google Chrome	latest
Mobile			Mozilla Firefox	latest
iOS	11.4.1 -> latest		Safari	latest
Android	6.0.1-> latest			

Human Resources

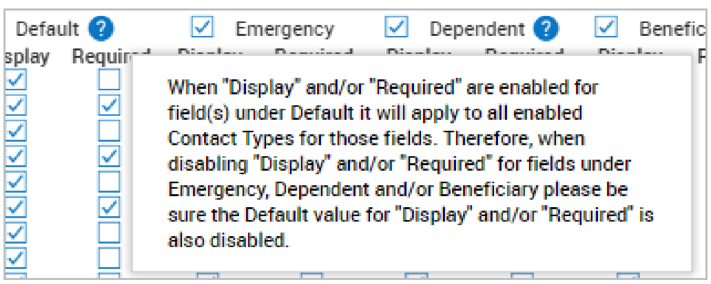
Account Contacts

Options Added to Require, Hide, and Display Fields in Account Contacts

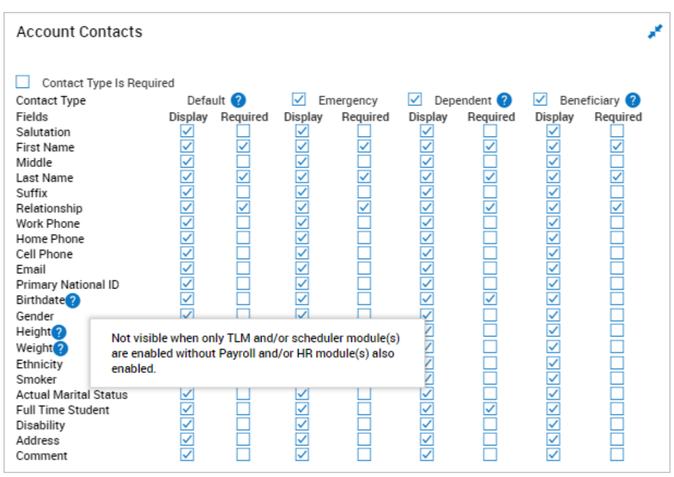
189552, 208805, 210557, 217165: A new widget called Account Contacts is now available in Company Settings. In the ***Account Contacts*** widget, customization has been added to allow you to require or not require contact types in account contacts on the employee profile, enable or disable certain contact types and to display or require certain fields for the enabled contact types.

The ***Account Contacts*** widget must be added to the *Company Setup* page. It will not be available by default. These settings will apply only when using the New Look on the Employee Record.

- **Contact Type** – Default (cannot be selected or de-selected), Emergency, Dependent, and Beneficiary can be checked/unchecked to enable/disable.
  - The *Display* fields will all be checked/enabled by default.
  - The *Required* items that were previously marked Required by the system will also be marked as Required by default.
- **Contact Type is Required** – Checking this option will require the accounts to have a contact type set before it can be saved.
- **Display/Required Fields** – Check *Display* to make the setting visible for the selected contact type(s) or uncheck it so it doesn't display. Check *Required* to require the field for the selected contact type(s). When un-checking *Display* or *Required* for fields under *Emergency, Dependent* and/or *Beneficiary, it should also be unchecked for Default.* A tooltip has been added explaining this.



Dependent, Beneficiary, Birthdate, Height, Weight - Will not be visible for companies that only have TLM and/or Scheduler modules enabled without also having the Payroll and/or HR modules. This has been explained in the tooltips for those items.



HR Actions – Account Contacts Action Item

When creating HR Actions, the *Account Contacts* action item can be added and all behaviors described above will be enforced. For example, if a contact is missing a required field, the HR Action cannot be completed until that required field is completed.

Employee Profiles – Account Contact Widget

After marking account contact fields with Display, those fields will show in the Add Account Contact pop-up. Marking fields as Required will display a red asterisk. The contact will be unable to be saved and an error message will be generated until the required fields are complete.

Imports: Employee Contacts Import Template

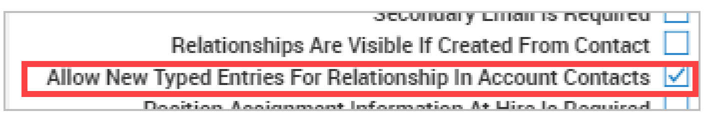
The Employee Contacts import template has been updated with the new fields in the Account Contacts widget of Company Setup. Error messages will be generated based on whether the fields are disabled.

- If an account contact type is toggled OFF in the company settings (disabled) and is included in the import, users will receive an error for invalid contact type.
- If a field is marked as Required in the Account Contacts widget and is missing from the import, an error will be generated.
- If a field is not marked as Display but is included in the import, no error will be generated. If a user then marks it as Display, it will display the data in the field.
- If Contact Type is Required and no contact type of Emergency, Dependent and/or Beneficiary is entered on the import, an error message will be generated stating that the Contact Type is Required.
- The system will accept "E" for Emergency, "D" for Dependent and "B" for Beneficiary as well as the actual word which will help with translations and globalization.

Adding Account Contact Relationship Types in Open Enrollment

202174: During Open Enrollment, employees can add an Account Contact which contains a Relationship type. Employees adding their own relationship type adds the entry to the global relationship list, which may not be desired. We are now introducing a way to limit employees from adding their own relationship types.

A new ***Allow New Typed Entries For Relationship In Account Contacts*** setting has been added to the *Account Policies* widget in Company Setup.



If enabled, employees can add their own entries. If disabled, the user will not be able to freely type a Relationship in Account Contacts (whether through the Account Contacts widget itself, through Open Enrollment, or via an HR Action). They will have to select from the drop-down list which contains the visible relationships configured under *Company Settings > Global Setup > Global List Definitions > Relationships*.

NOTE: This setting is enabled by default for backwards compatibility. It can be disabled to restrict users from adding new relationship types.

Account Demographics

Visa Type 482 Added to System

207122: Visa form type 482 has been added to the system and is available for employees in the Account Demographics section of employee profiles. This form is a temporary work visa used to sponsor persons to work in Australia. It will be available in the Applicant Profile and will also be available for HR Actions, Imports and will display in PDFs. Form 482 replaces outdated form 457.

Benefits

Localization of Fields in Approve Change Request Pop-Up

207294: The Approve Change Request pop-up used by managers to approve/reject a benefit change request will now be localized to the Locale settings within Company Setup. If an employee has a different locale assigned, the manager will see the fields based on the company locale.

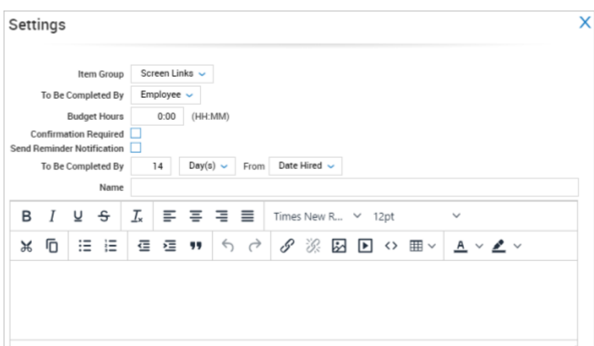
The following fields will be localized.

- Coverage Amount
- Premium
- Frequency
- Estimated Monthly Premium
- Taxable Income
- Total Estimated Monthly

Checklists

New! Content Checklist Item Added to Checklists

180465: A new **Content** checklist item is now available to be added to checklists. This item allows you to add specialized content such as rich text, images, videos, links, tables and more. When the recipient opens their checklist, the created content will display. This item can give the recipients an engaging experience when working through their checklist. This is located under *Company Settings > HR Setup > Checklists*.



Company Settings

Primary Phone Default Setting Added to Company Setting Defaults

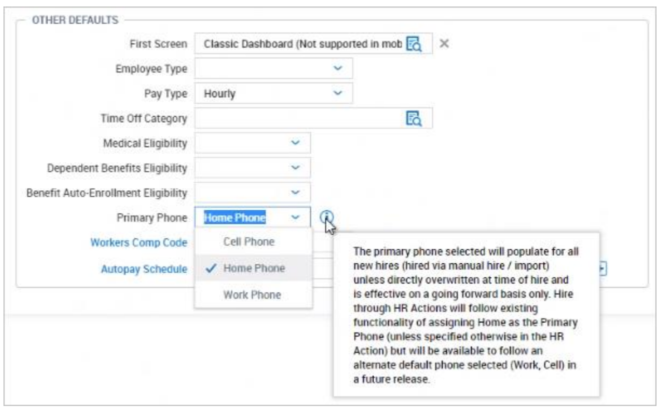
207775: Previously, when hiring an employee, the Primary Phone defaulted to the Home Phone and users did not have the option during the hiring process to default this to another option such as Cell Phone.

To address this, a primary phone default setting has been added to Company Settings so you can designate the default primary phone to be either the Work, Home or Cell Phone upon hire.

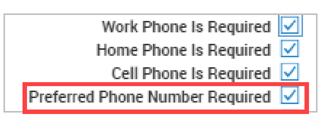
This is located in the *Account Policies* widget under *Company Settings > Global Setup > Company Setup > Defaults*.

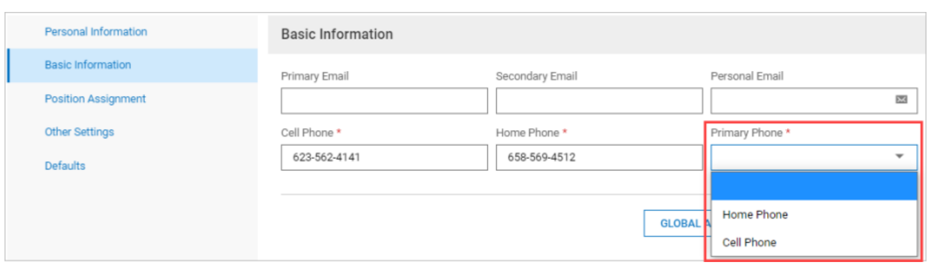
This applies to manual hires or imports. Hiring through HR Actions will follow existing functionality. This is further explained in the tool tip of the *Primary Phone* field as follows:

- The primary phone selected will populate for all new hires (hired via manual hire / import) unless directly overwritten at time of hire and is effective on a going forward basis only. Hire through HR Actions will follow existing functionality of assigning Home as the Primary Phone (unless specified otherwise in the HR Action) but will be available to follow an alternate default phone selected (Work, Cell) in a future release.



If Work Phone, Cell Phone, and/or Home Phone are marked as Required in the *Global Policies* widget of Company Setup, the *Primary Phone* drop-down will still appear in the hire screen for manual hires. If a selection is made in this drop-down, it will overwrite the default primary phone. If left null, the default primary phone from the *Defaults* tab will populate upon hire.





Primary Phone Number in Employees Import Template

16682: *Primary Phone* has been added to the *Instructions* tab. This allows you to set whether Home Phone, Cell Phone, or Work Phone will be the primary phone for employee accounts.

- Will be available in Excel, Excel 2007 and XML versions.
    - Since columns in Excel (.xls) are maxed out, this will be listed on the Instructions Tab and you will need to remove an unused column and insert the Primary Phone column. For Excel .xlsx and XML it will appear by default after Cell Phone.
- If Primary Phone is not specified on the import template, it will use what is set in company defaults.

My Information HR Action: Ability to Set Primary Phone Number

207766: Employees filling out a My Information HR Action request can now designate which of their phone numbers are primary. Previously, they could list their phone numbers (Home, Cell, Work) but could not designate a primary.

Custom Forms

Employee ID & Approved/Rejected Columns Added to Custom Forms Details Report

208891, 174170, 212342: Previously, this report contained only the Approver's Name that completed the latest Approve step of the workflow. But users could not see when (timestamp) an approval occurred. Also unavailable were Employee ID and Rejecter information.

For both the **Employee ID** and **Approved On** columns:

- If a workflow has multiple approver steps, these columns in the report will display data for the most recent approver.
- Does not apply for auto-approved workflow steps. It only applies to the actual approver(s).
- These columns are available for employee or applicant type forms.

The following columns have now been added:

- **Approver Employee ID** (only available for MSS report) - This column will populate with the approver's employee ID.
- **Approved On**
- **Rejecter Full Name**
- **Rejecter First Name**
- **Rejecter Last Name**
- **Rejected On**
- **Rejecter Employee ID** (only available for MSS report) - This column will populate with the approver's employee ID.

The columns have the following characteristics and behavior:

- Above columns are not default columns and must be added.
- If a workflow has multiple approve/reject steps, these columns in the report will display data for the most recent approver/rejecter and associated dates for the most recent approval/rejection. For example, Rejected On date will bring in the timestamp of the most recent Rejection and Rejecter Full Name will bring in the name of the most recent Rejection.
- Rejected On/Approved On Date columns will populate with the date and timestamp and will honor locale settings for date/time formats.
- Grouping, sorting, filtering, and exporting of column(s) is supported.
- The *View Details Report* for Applicant type forms will update with above changes as well.
- Data under *Rejected On* and *Approved On* will be populated for all rejections and approvals done even in past cases, while for other rejecter and approve columns (i.e., First Name, Last Name, Full Name, Employee ID) data will be populated on a going forward basis only.)

Navigation:

- For managers, these forms are located in the *Open* tab under *Team > HR > Forms > Other Forms*, and then selecting *View Detail Report* under the ellipsis.
- For employees with proper security access, these forms are located in the *Open* tab under *My Info > My HR > Forms > Other Forms*, and then selecting *View Detail Report* under the ellipsis.

Points Details Field Added to Custom Forms

196666, 217308: When editing a page in a custom form, a **Points Details** field has been added to the *Field* drop-down when selecting *Type: Employee*. This is only available if the Points module is active and in use within your company.

When selecting this points field, points details will that are automatically created by the points engine will now be included in the custom forms, giving employees quick visibility to the points details that triggered the form to be sent. Including the details prevents employees from having to manually hunt for the information and can limit employee challenges due to inadequate information.

Points details will be available whether the custom form is manually created or is part of an HR Action or Checklist.

Users must have security permission to view the content.

- ESS: *View Points History* in ESS tab under Time Tracking
- MSS: *View Employee Balances* in Modules tab under Points System

Position Assignment Fields Added to Custom Forms

184364, 206919: The following Position Management fields have been added to Custom Forms. When added, these are read-only fields. These fields are available in the *Field* drop-down when selecting *Type*: *Employee.*

When added, they will populate with the employee's Primary Position Assignment. If the employee does not have a primary assignment, the fields will display as blank.

- Assignment Number
- Position Name
- Assignment Start Date
- Assignment End Date
- Assignment Change Reason
- Assignment FTE
- Assignment Annual Position Base Comp (as in Position Assignment)
- Assignment Annual Position Supplemental Comp
- Assignment Total Position Comp
- Assignment Avg. Annual Budgeted Total Comp
- Assignment Annual Position Work Hours
- Assignment Direct Reports To Position
- Assignment Direct Reports to Manager
- Assignment Cost Center 1 through Assignment Cost Center 9
- Employee Assignment Attribute 1-10
- Position Attribute 1-25

If the user adding the fields does not have the security permission *View w/o Amounts*, the following fields will not display.

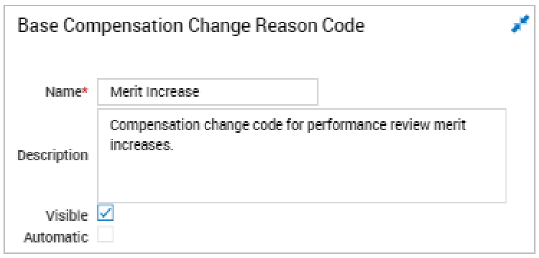
- Assignment Annual Position Base Comp
- Assignment Annual Position Supplemental Comp
- Assignment Total Position Compensation
- Assignment Avg. Annual Budgeted Total Comp

Employee Profiles

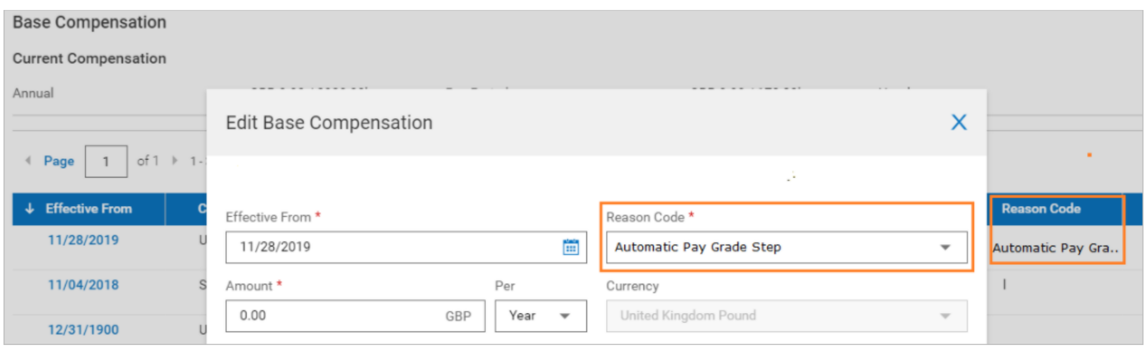
Reason Code Generated for Automatic Pay Grade Steps Update

177569: To create Reason Codes, a new **Base Compensation Change Reason Codes** menu item has been added under *Company Settings > HR Setup > Base Compensation Changes Reason Codes*.

- This opens the same maintenance page that is available from the hyperlinked portion of the title for the *Base Compensation Changes Require Reason Codes* setting in Company Setup.
-



Within Pay Grades that are configured with Automatic Pay Grade Steps, the system will automatically generate an **Automatic Pay Grade Step** Reason Code that will populate the automatic entry in the employee's Base Compensation widget in their employee accounts.



Job Change History Widget Updated

203060: When the **New Look** is switched on, the *Job Change History* widget was previously missing the *Salary Change Reason* and *Termination Reason Code* columns. Those have now been added to the New Look view and can be added using the Add/Remove Columns option.

Other Settings Widget in Employee Profiles

207175: When hiring employees either manually or through an HR Action, any extra fields that are left blank will not be validated for effective dates that are before the latest one. If an extra field is required when adding a new line, only the latest line will be marked as required.

HR Actions

Updated Lookup for Default Job and Other HR Action Items

214845, 214580: When an HR Action contains a Default Job item, the user processing the action will now see an updated lookup when clicking the icon in the Default Job field. The previous lookup pop-up page used a single selection. The new lookup page is now the company standard report page style. This updated lookup page applies to all other action items as well. Items that are date sensitive, such as Benefit Plans, will be presented with a date picker.

Updated Single Select Lookup for Pay Prep Profile/Workday Breakdown Template – TLM & HR

208850, 208849: In Desktop, Mobile, and the Mobile Version on Desktop, the *Pay Prep Profile* HR Action Item now utilizes a single select lookup. In addition, the *Workday Breakdown Template* inside the corresponding HR Action also contains the new single select lookup.

Imports

Cost Centers Added to Workers Claim Import

208590: The cost centers associated with a workers claim will now be included in the Workers Claim import template. They will be shown as Cost Center 1, Cost Center 2…up to Cost Center 9. The Instructions tab has been updated with the cost center information as well.

If a Cost Center is specified in the import template, when a workers claim is processed, the *Specify Cost Center* checkbox is selected, and cost center-related fields are populated. The Address is populated automatically according to the Cost Center address.

Exception: If the cost center specified in the import template is equal to the employee's default cost center, the behavior is the same as if the cost center is not filled in the import template.

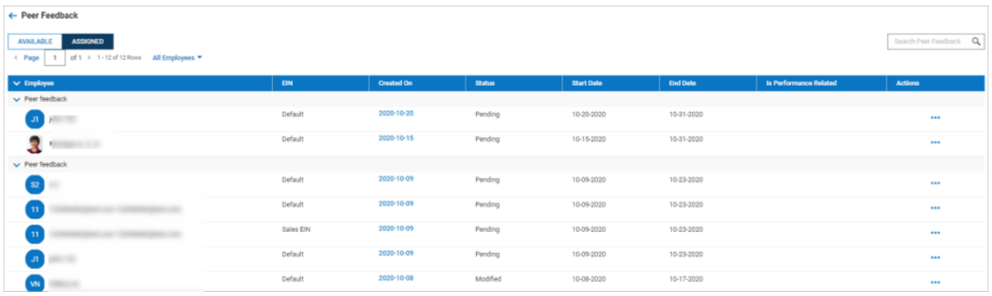
Performance Management – Peer Feedback

Multiple improvements have been made to the Peer Feedback process to make the process easier for both managers and employees to provide and manage feedback. Some of the updates are new and some are redesigns, and all support the framework and standards of the user interface.

Peer Feedback: Updated Page on Assigned Tab of Peer Feedback

139850: The Assigned tab view for managers has been updated as follows:

- Records are grouped by Peer Feedback Name - Peer Feedback Name column removed
- Created On column has been added
- Records are sorted by Created On date (descending) within a group
- The value in the Created On column is hyperlinked and selectable, taking user to the Peer Feedback page for the selected record



Peer Feedback: Ability for Managers to Add/Delete Providers

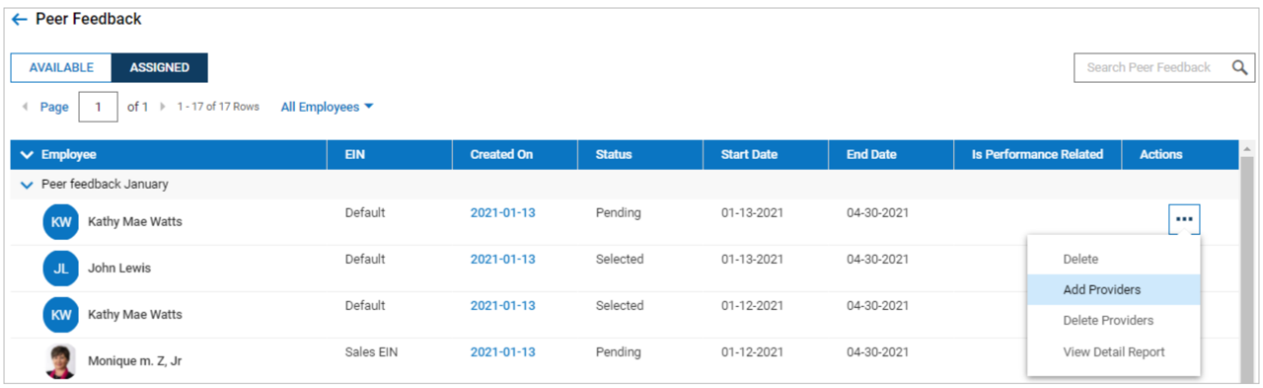
210317, 198696: Managers viewing feedback details for their team members on the Assigned tab can manually add and delete providers.

Deleting Providers

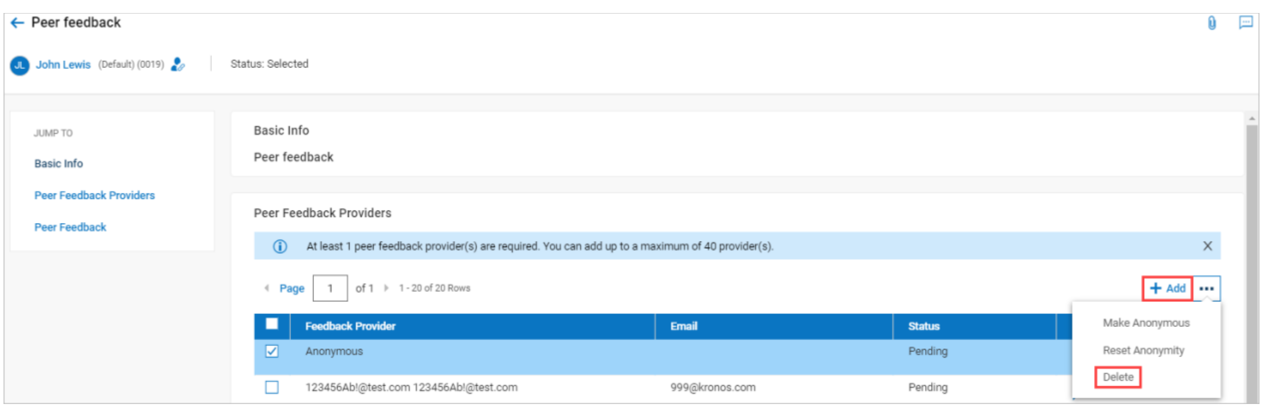
- Bypasses the approval process and deletes the To Do Item for the provider.
- Multiple providers for the selected employee can be deleted at once on the Delete Providers pop-up.
- If feedback has been submitted by a provider, a message will be generated to warn that the feedback could not be removed because it was submitted.

Adding Providers

- Bypasses the approval process and creates a To Do Item for the provider.
- Multiple providers for the selected employee can be added at once on the Browse and Select Employees popup.
- Feedback provider cannot be the same person as the employee. System will generate a warning message in such cases.



Within the Peer Feedback, adding and deleting is also supported for feedback that has not been submitted.

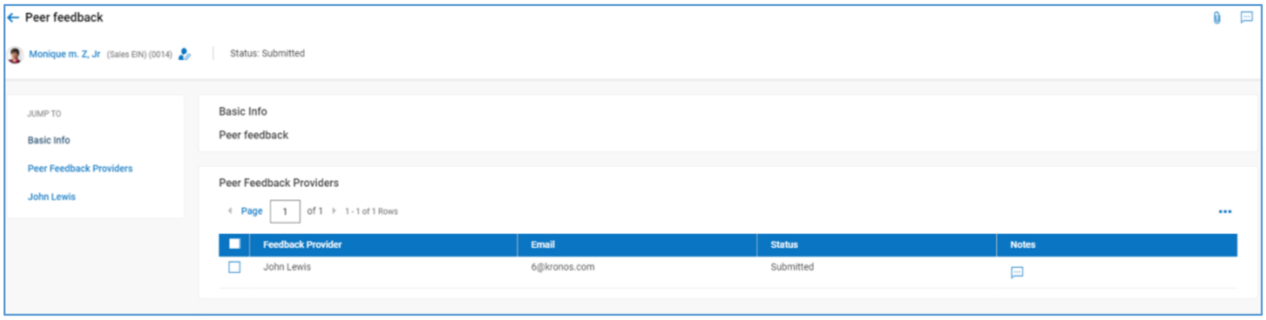


Peer Feedback: Ability for Managers to Add Notes and Documents When Viewing Feedback

134435: Managers viewing feedback details for their team members can now add notes and documents.

- Managers can add Notes on individual Feedback provider - per feedback note only stored in the feedback section
- Managers can add Documents & Notes on Feedback in general (icons at top of page.)

Users must have security permissions enabled for adding notes and attaching documents (current security setting applies here – no new setting added).



Peer Feedback: Assigned Employee No Longer Displays in Peer Feedback Provider Lookup List

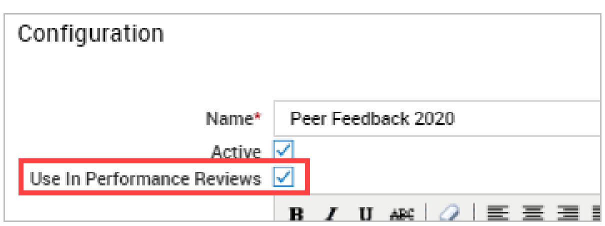
146060: When a manager (or other user) selects *Add Peer Feedback Providers* from their My To Do Item for peer feedback, their name will no longer display in the employee list (*Browse and Select Employees* pop-up). This was done because it doesn't make sense for a user to assign themselves to their own feedback.

Peer Feedback: Allow Peer Feedback to be Used in Performance Reviews

125625, 204973, 125630: When creating a new Peer Feedback configuration under *Company Settings > HR Setup > Performance Review > Peer Feedback*, a new ***Use In Performance Reviews*** checkbox has been added. When checked, the peer feedback will be used only in performance reviews.

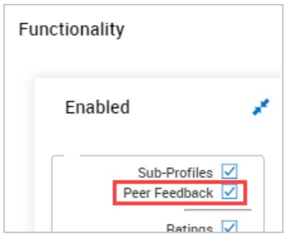
This is not retroactive – existing peer feedback configurations will not have this option show as active, and instead will be grayed out. This is only valid on new configurations.

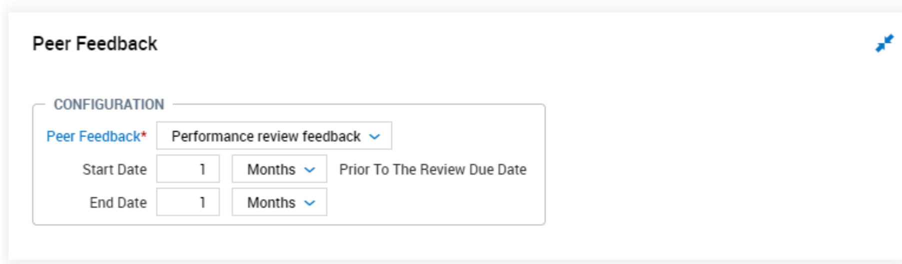
When checking this box, Peer Feedback will be managed within the performance review and will not be available under *Team > Talent > Performance > Peer Feedback* but will be visible on the Assigned tab when used.



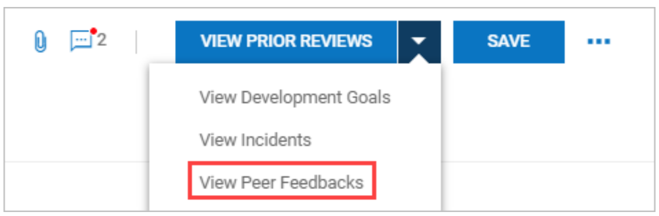
In Performance Review Profiles, a ***Peer Feedback*** checkbox is available in the *Enabled* section of the *Functionality* widget. When checked, the Peer Feedback configurations where the *Use In Performance Reviews* checkbox is checked, will be included for employees assigned to the performance review profile.

A new ***Peer Feedback*** widget will then be available and should be added. Once added the first time, it will be available for other profiles. The feedback will occur independently of user intervention based on the dates of the performance review and the time period set to collect and end peer feedback.





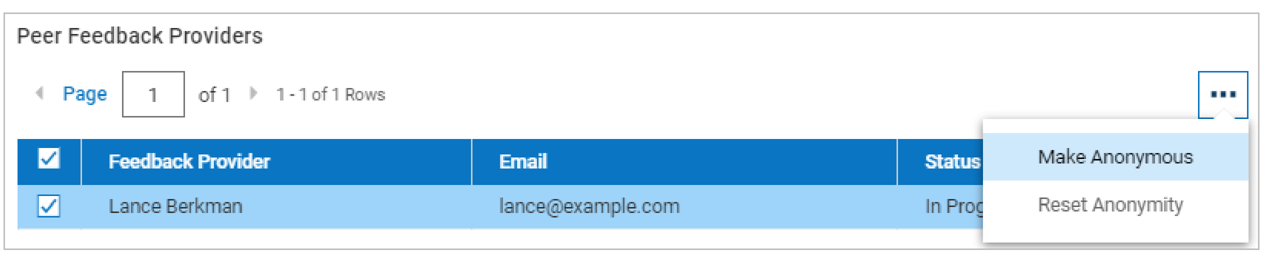
Managers with proper security rights can view peer feedback from the drop-down from the *View Prior Reviews* button.

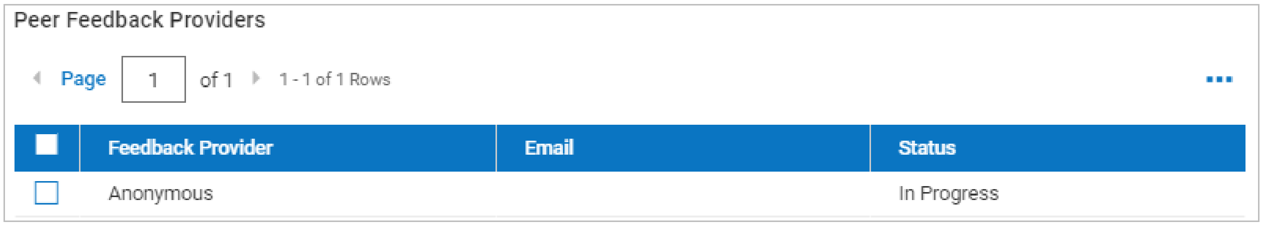


Peer Feedback: Ability to Make Feedback Anonymous

198694: Managers can now hide the name and basic information of a peer feedback provider. A new ***Make Anonymous*** option can be selected so user names and image will not be shown on the reports. If the employee has an image, the image will show as the letter A and the name will show as anonymous and the email address and job title will be hidden. A ***Reset Anonymity*** will disable the option and make them visible again.

This is done within the *Peer Feedback Providers* widget under *Team > Talent > Performance > Peer Feedback*. Managers can select a feedback provider, and then select **Make Anonymous**. This will reset the provider's name to Anonymous. To restore the provider's name, use **Reset Anonymity**.



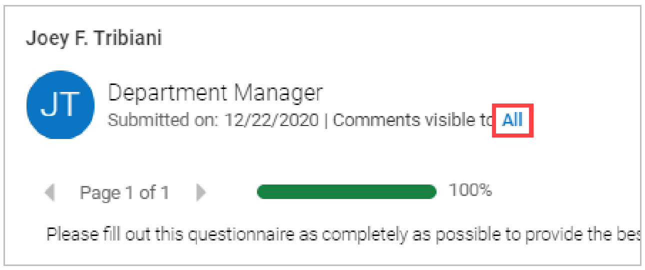


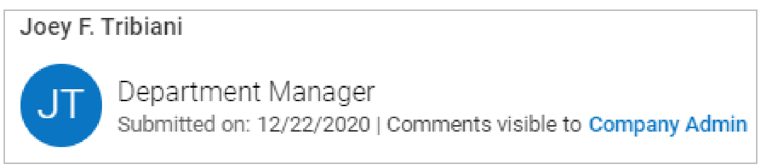
- Managers can set feedback to *Make Anonymous* or *Reset Anonymity*.
- Employees providing feedback can make themselves anonymous.

NOTE: Managers will always have the choice to override the anonymity of a provider.

Peer Feedback: Ability to Modify Visibility to Feedback

203223: Managers will now have the ability to limit visibility to Peer Feedback. Visibility only exists if feedback has been given (Submitted or Modified status). Admins or managers can review feedback on the *Assigned* tab under *Team > Talent > Performance > Peer Feedback*.





Depending which option is selected will determine who can view the comment by feedback providers. The selection will change the view on the page.

- **Visible to All** – anyone with access can view feedback by providers
- **Visible to Company Admin** – only the administrator can view feedback by providers
- **Visible to Select Employees** – only the selected employee(s) & Full Rights Admins can view feedback by providers

NOTE: The Anonymous options can be used in conjunction with the Visibility options.

Peer Feedback: Approve Automatically Step Added to Peer Feedback Workflows

139487: A new and separate ***Approve Automatically*** step has been added to Peer Feedback workflows. Depending where the step is placed in the workflow, approval of peer feedback providers or feedback will occur automatically without user intervention.

Position Management

Position Attributes Included in Reports

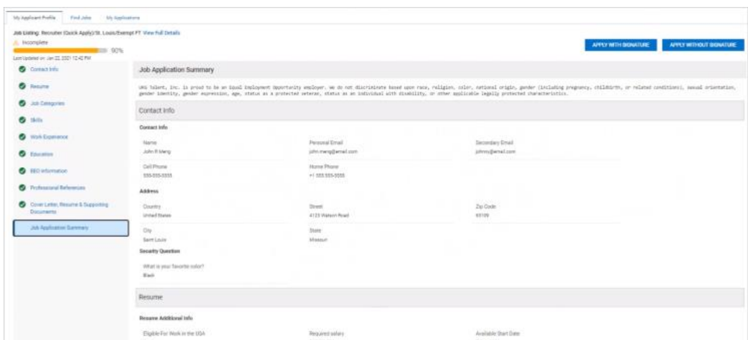
206158: Position attribute columns have been added to the **Pay Statement History (Detail)** (requires Payroll sub-system) and the **Employee Information** report pages. If employee position assignment attributes are enabled in Company Setup (Position Management widget), any assigned attributes will display in the report pages when adding these columns to the reports.

Recruitment

Applicant Profile Setup: Job Application Summary Tab Added

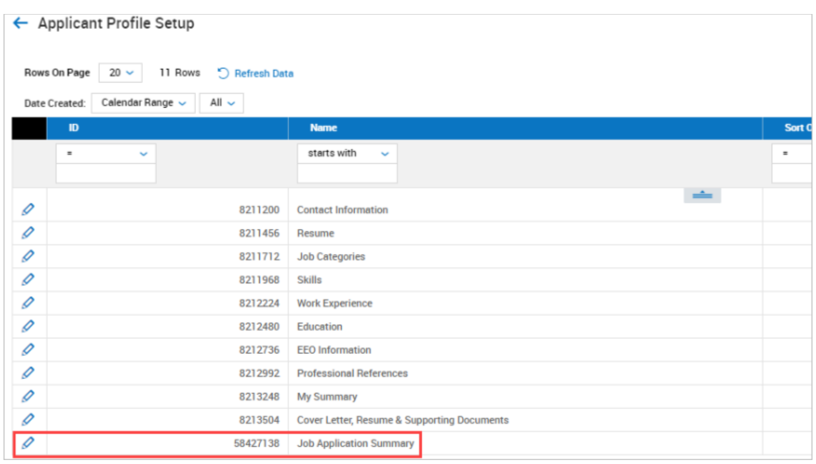
205650, 205677: A new **Job Application Summary** tab has been added to Applicant Profile Setup.

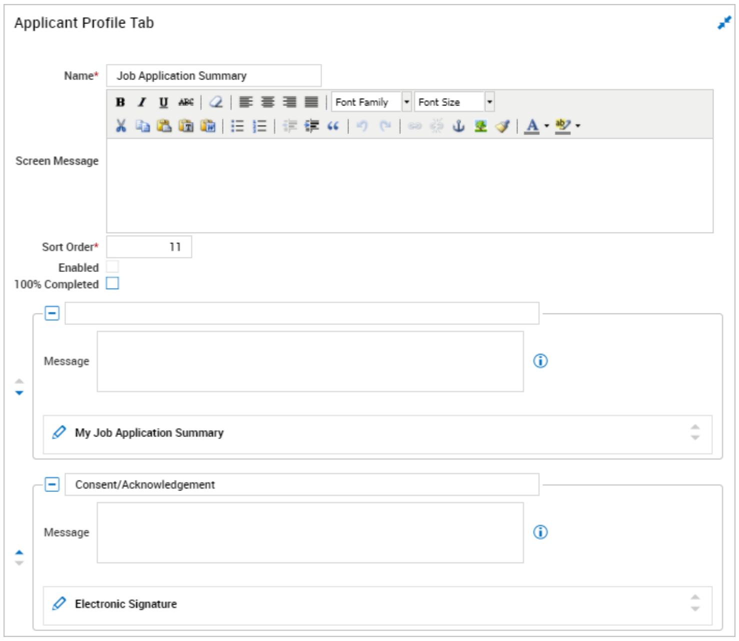
The information in the ***Job Application Summary*** tab becomes active when the applicant has completed their job application process. The system takes a snapshot in time of the information they provide while applying for a specific job. Prior to submitting/signing, if they make edits to any of their information, the summary tab will update. Once they submit/sign, any further edits will not be reflected in that job application.



For Administrators: The Summary tab allows you to customize a *Consent/Acknowledgement* message for the job application. *Electronic Signature* is now available on this tab. Also allowed is a customized *Screen Message* and a customized title and message for *My Job Application Summary*.

Coming in a Future Release: This information will be available in the downloaded PDF for Job Applications.



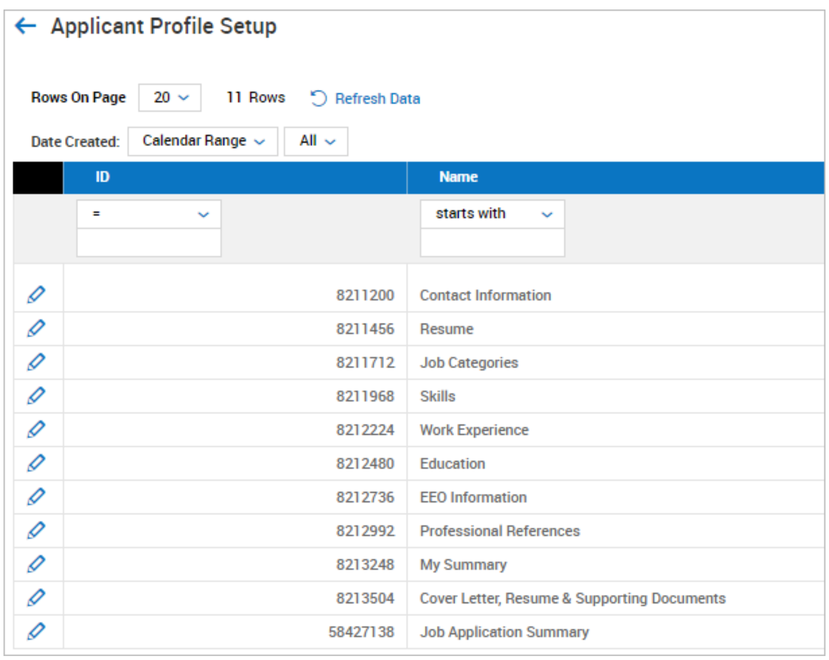


Applicant Profile Setup: Cover Letter, Resume & Supporting Documents Tab Moved

205644: To allow applicants the ability to add cover letters, resumes and any supporting documents prior to finishing and applying, the Cover Letter tab has been renamed and moved. The new name is **Cover Letter, Resume & Supporting Documents**.

It will now be located above the new ***Job Application Summary*** tab. This tab will have a *Save & Continue* button (previously it had a *Finish & Apply* button) and when clicked will validate information and move the applicant to the next tab.

As with the other tabs, the names and messages can be customized.


Applicant Profile Setup

Rows On Page 20 · 11 Rows · Refresh Data

Date Created: Calendar Range · All

ID	Name
8211200	Contact Information
8211456	Resume
8211712	Job Categories
8211968	Skills
8212224	Work Experience
8212480	Education
8212736	EEO Information
8212992	Professional References
8213248	My Summary
8213504	Cover Letter, Resume & Supporting Documents
58427138	Job Application Summary

Applicant Profile Setup: Localization of Tabs
214188: Applicants will be able to view the information in their Applicant Profiles in their designated locale language. All system default text in the tab headers, section headers, and screen messages will be translated accordingly.

Quick Apply: Knockout Waiting Period Added to Quick Apply Applicants
206055: Previously, when Quick Apply applicants were knocked out through a job-related questionnaire, they were not restricted to wait the specified period before reapplying for the job. Going forward, Quick Apply applicants will now be subject to the configured waiting period set in the knockout questionnaire.

Security: New Permission Added to Limit End User Access to Hiring Stages in Job Requisitions
187124: Historically, if users have access to View/Edit Job Requisitions in their Security Profiles, they can also View/Edit the Hiring Stages within the Job Requisition (such as enforcing sequence, enabling/disabling specific hiring stages and/or marking certain hiring stages as required or changing the sequence order).

If you do not want your users to have this ability within job requisitions, a new security permission has been added that will control this access.

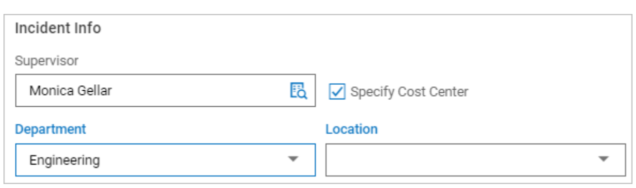
The new ***Job Requisition Hiring Stages*** setting is under the *HR* Tab in the *Recruitment* section where other Job Requisition items are located. Options are Null, View and View Edit.

- For backwards compatibility, *View/Edit* will be selected by default.
- If *Null* is selected, the user will not be able to View or Edit the Hiring Stages section or any of its contents.
- If *View* is selected, the user will be able to View the Hiring Stages section but will not be able to edit any of its contents.
- If *View/Edit* is selected, the user will be able to View the hiring stages section content and make edits.
- Existing functionality still remains in that once an application is tied to a job requisition, no changes to hiring stages in that job requisition can be made.

This new setting only affects the hiring stages widget within the job requisition and does not control whether the manager can move the applicant to different hiring stages on the job application, as that is already controlled by a separate existing security item for Job Application Hiring Stages.

Workers Compensation

Cost Centers Added to Worker's Claims
211307: HR Managers can now connect a Workers Claim to a specific Cost Center so that incident reporting is done accurately. A new ***Specify Cost Center*** checkbox has been added to the Workers Claim Incident tab. If checkbox is checked, users can select one specific Cost Center from the values available to the user. This is done from *Team > HR > HR Maintenance > Worker Claims*.



Payroll

Important! Quick Payroll Under Construction

219834: We are in the process of making some needed and required UI changes to Quick Payroll. As a result, this feature will be unavailable after the April Release (R74) is applied to your server. The unavailability will most likely extend into future releases. When it is set to become available again, we will notify you in the that release's release notes.

Auto Correct for FFCRA Earning Types

216467: To eliminate some manual work that employers have to do when their employees take leave because of COVID-19, the system now automatically unchecks the Auto Correct check box after an employee is paid using any of the following three FFCRA earnings types:

- FFCRA Family Leave 10 days
- FFCRA Sick Leave 10 days
- FFCRA FMLA 10 weeks

After an employee is paid with one of these earnings types, the system ensures that their tax is not Auto Corrected for the rest of 2021. The system also ensures that the Auto Correct check box is returned to the checked state on the first day of 2022.

The Auto Correct check box appears on the Account Taxes report and the Earning/Deduction/Tax Listing (Summary) report.

Account Taxes Report Column Name has Changed

202698: In the Account Taxes report, the *W4 2020 Form: Claim Dependent* column has been renamed to *Claim Dependent/Amount/Credits*.

Employer Tax Settings Updates for Eugene, OR

218512: Employer tax settings for Eugene, Oregon are updated in the system. Updates include the following:

- Employers can see the Company Wages YTD and Number of Employee parameters from the statewide widget on the Eugene tax code.
- Employers can see the Quarterly Wage parameter on the statewide widget for the Eugene Tax code.
- Users can edit the calculated YTD wages number.
- Users can edit the calculated number of employees.
- The Hourly Rate parameter has moved to the employee level. Users can enter the EE Hourly rate, or if it is blank, the STE calculates the hourly rate.

Federal Form W-4 Updates for 2021

186920: The IRS has updated the 2021 Federal W-4 form. It is now available in the system.

Federal Lock In Letter Updates

193213: The IRS has updated Lock In Letters 2800C and 2808C for 2020 and forward. The updated letters are now available in the system. The letters provide employers with the withholding (filing) status, withholding rate, and any annual reductions to withholding or additional amount to withhold per pay period, in dollar amount terms. The withholding instructions now look like the following on the redesigned Lock In Letters:

- Withholding Status (Filing Status): Single, Married or Head of Household
- Withholding rate: Standard withholding rate or higher withholding rate checkbox
- Annual reductions from withholding (Form W-4 line 3): $__________
- Other income (Form W-4 line 4(a)): $_________
- Deductions (Form W-4 line 4 (b)): $___________
- Additional amount to withhold per paycheck (Form W-4 line 4(c)): $_________

FFCRA Wages Included in 2020 W2

184263, 214394, 215725: The system is updated to include FFCRA wages in Box 14 of 2020 W2 forms. For earnings codes created with these system types, the description on the W2 will appear as follows:

- For Earning Codes with System Type= FFCRA Family Leave 10 Days:
  Tax Forms = W2, Box Type = 14 - Other Description On W2 = **SKLV$200**
- For Earning Codes with System Type= FFCRA FMLA 10 Weeks:
  Tax Forms = W2, Box Type = 14 - Other Description On W2 = **EMFAMLV**
- For Earning Codes with System Type= FFCRA Sick Leave 10 Days:
  Tax Forms = W2, Box Type = 14 - Other Description On W2 = **SKLV$511**

NOTE: Users must recalculate 2020 W2 forms in Year End Processing in order for the system to populate FFCRA wages into Box 14.

Time and Labor

Timesheet

NEW Timesheet v2 – Timesheet Metrics

Configuration Widget/Metrics Bar

200560, 200564,200567, 208700, 200566, 208703, 219616: Users can now configure timesheet metrics in order to more readily access an overview of timesheet data in the New Timesheet.

What's been added: In the Timesheet Profile for Start/End (All Hours) and Bulk Hours timesheet profiles, a new widget has been added, *Timesheet Metrics*. From this widget, enter a *Label* and enable the checkbox next to *Display*. *Raw Total* and *Calc. Total* and their configurations will display by default.

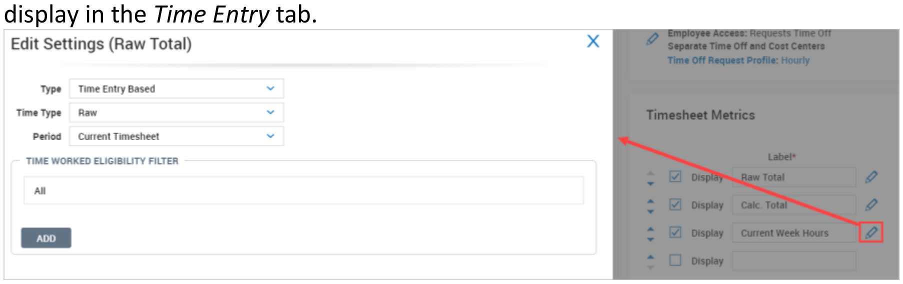
To configure the timesheet metrics settings, click the pencil *Edit Settings* icon. From the *Edit Settings* pop-up, configure the following based on the selected *Type*:

- **Accrual Based** – Choose the Time Off, a Value To Display (Balance, Projected Balance, or Taken), what the value should display as, and the Period (Today).

  The Accrual Based metrics can help users determine how much time off they have left.

- **Counter Based** – Choose the Type of Counter (Amount, Quantity, or Time), choose the Counter, and the Period (Current Timesheet, Current Week, Today, Total View).
- The Counter Based metrics can allow, for example, an employee to determine the amount of bonus money based on the current week they are looking at.
- **Exception Based** – Click the pencil Select Exceptions icon to enable the exceptions that you want included and choose a Period (Current Timesheet, Current Week, Today, Total View).
- The number of Exceptions will display in the metrics bar. If you manually add an exception, that will count towards the Exceptions number in the metrics bar.
- **Time Entry Based** – Choose the Time Type (*Calculated* or *Raw*), and the Period (*Current Timesheet*, *Current Week*, *Today*, *Total View*). You can also add a filter from *Time Worked Eligibility Filter*, such as Time Off.

  The *Time Entry Based* metrics display the Timesheet totals (calculated or raw) that currently do not display in the *Time Entry* tab.



The *Period* field includes the following options:

Today – This will show the value of the configured metric as of today.

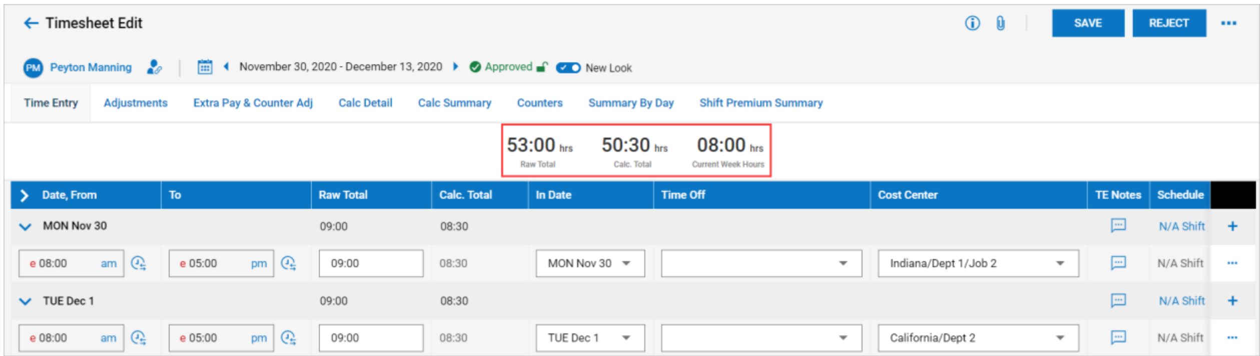
Current Week – This will show the value of the configured metric as of the current week based on the *Week Starts On* setting in the Timesheet Profile.

Current Timesheet – This will show the metrics for the current timesheet (i.e. the timesheet which today's date is part of).

Total View – This will show the metrics for the timesheet the user is looking at.

Up to four metrics can be configured and enabled. The metrics in this widget can be reordered by clicking the arrow buttons.

Timesheet Metrics that are configured and enabled will display for users to view from their timesheet in a static metrics bar.



Timesheet v2

Inform Users of the DST Changes

210489: As previously available in the Classic Timesheet, in the New Timesheet, during the week of Daylight Savings Time according to the user's time zone, a static inline information message will display when users open their timesheet to inform them of the DST changes.

Calc Detail Tab – Display Info Column

211221: In the New Timesheet, if the Pay Calculations 2.0 rule *Calculate Holiday/Time Off Based On Average Hours Worked Prior* is configured, an *Info* column will display in the *Calc Details* tab when an information message is generated by this rule.

Customize Order of Time Entry Collected Data

116865: In the New Timesheet, when *Mobile* is selected for the *Timesheet View*, you can now reorder the columns in the header of the timesheet in the *Time Entry* tab. From the *Time Entry Collected Data* section of the Timesheet Profile, define the order by clicking the up/down arrows next to each column label.

NOTE: The *From* and *To* action columns cannot be re-ordered.

Simple Punch with Populate Full Day on First Punch Timesheet Rules Ignored Check Distance

180819: Previously, when Simple Punch was used in conjunction with *Populate Full Day*, the Geofencing timesheet rules were being ignored, which allowed employees to punch in from outside the set range.

What's new: In order to allow employees to use Simple Punch without Geofencing rules being ignored, a new setting has been added to the *Check Distance* rule, *Treat first simple punch of the day as punch in*.

If this setting is enabled along with *Populate Full Day*, the first punch of the day will consider what is configured in the *Check Distance* rule. If this setting is disabled and *Populate Full Day* is enabled, the first punch of the day will populate the configured time and skip the *Check Distance* rule.

Timesheet Change Requests

TSCR – Reprocess Punches when Punches are Added to the Day

160369: Previously, when punches were added to a day via Timesheet Change Request and punches already existed for the day, the punches would be placed out of order and new rows were added.

What's been added: A new setting has been added to the *Change Requests Employee Can Perform* section of the Timesheet Profile, *Reprocess punches for the day*. When enabled, options for *Add Punch In* and *Add Punch Out* will display to enable. If enabled, when punches are added to a day via Timesheet Change Request, the system will reprocess all punches in the day to ensure they are properly ordered.

Timesheet Punch Settings

Clock Widget – Show Collect Extra Pay

189067: The *Show Collect Extra Pay* setting is now available for the *Clock* widget. When enabled, the *Add Extra Pay* icon will be available in the *Clock* widget for users to select in order to add extra pay.

TLM Timesheet Workflow Migration

Timesheet, Overtime, TSCR, Time Off Request Workflow Migration

140083, 180095, 138293, 180098: Users are required to initiate the workflow migration, and it is suggested to do so. In order to help this process, timesheet workflow migrations will now be automated for all users who have not initiated the workflow migration.

TSCR Workflow Migration

Time Off Pending for Cancellation Cannot be Chosen for Modify Time Off TSCR

151957: Previously, in Desktop, Mobile, and the Mobile Version on Desktop, employees were able to submit a Modify Time Off Change Request for time off that was in progress of being cancelled by the manager.

What's changed: If *Modify Time Off* is selected for *Change Type* in a time off that is in the process of being cancelled, the *Submit Changes* button in the *Change Request* pop-up will be grayed out so that employees cannot submit the request.

Attestation

Attestation Configuration

InTouch – Attestation Workflow "Remove Punch" Option

NOTE: Before including any health-related questions in Attestation please consult with your legal counsel to ensure you are compliant with applicable privacy laws and regulations.

181734: In Release 70 (September 2020), a *Restrict Punch* option was introduced in the Attestation Questionnaire workflow in the action properties setup for web punch and timesheet punch buttons in Desktop, Mobile, and the Clock widget. When a user is restricted, a custom warning message will display, and the punch will be restricted from being added to the timesheet.

In this release, the *Restrict Punch* option is now available for the OneTouch devices. If a punch is restricted from the OneTouch device, the punch will be included in the *Unprocessed Punches* report with the status, *Restricted From Punching Due To Attestation*.

Attestation Punch

Capture Expired Attestation in Questions and Answers Report

184705: Previously, the *Questions and Answers* Attestation report (under *My Info > My Reports > Time Reports > Attestation > Questions and Answers*) only captured questions that received a response; the report did not track Attestation questions that were left unanswered and expired. The *Completed* column always displayed *Yes* because the Attestation workflow was completed, but it did not display specifically if the question was answered.

What's changed: The *Completed* column in this report is now hidden and has been replaced by a *Request Type* column. The *Request Type* column will display either *Negative* (if the employee answered No), *Affirmative* (if the employee answered Yes), or *Expired* if the question was not answered.

A *Reason Codes* column is also available if the employee is required to choose a reason.

The *Response Name* column will show which response the employee chose (such as *Yes*).

In addition, the *Question Name* column previously displayed as blank. Going forward, the name of the workflow question will display in this column.

Custom Punch Attestation when Punch In/Punch Out Attestation Enabled

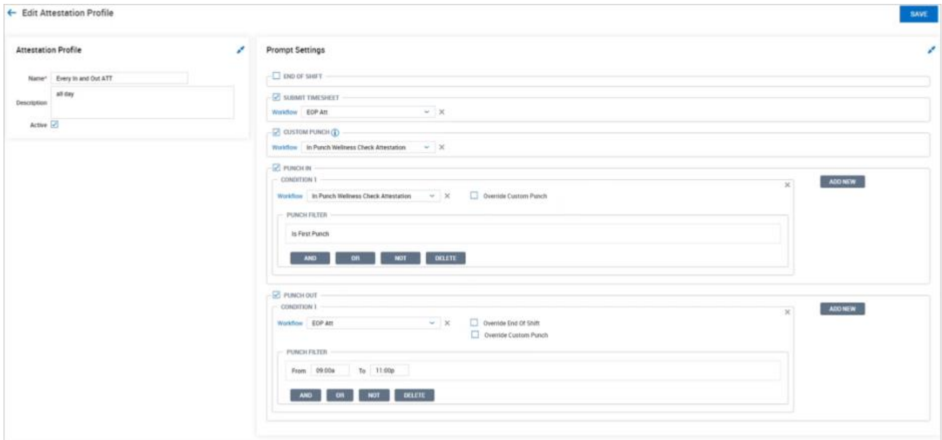
209695: In Release 69 (June 2020), the *Custom Punch* option in the Attestation Profile was made available, and in Release 70 (August 2020), this option was removed.

What's been added: The *Custom Punch* option in the Attestation Profile has been made available again for Desktop, Mobile, Mobile Version on Desktop, and InTouch devices. For users who want a separate button that employees can press at any time of the day outside of the normal punch in/out buttons, *Custom Punch* can be enabled with its own workflow.

In addition, *Override Custom Punch* checkboxes have been added to *Punch In* and *Punch Out* in the event that *Custom Punch* is set to the same time as Punch In/Out, and the *Custom Punch* option needs to be overridden by the In or Out punch.

For example, if *Punch In* and *Custom Punch* are both configured for morning Attestation and have two different workflows, you can set *Punch In* to take priority over the *Custom Punch* by enabling *Override Custom Punch*.

If *Custom Punch* is enabled with *Punch In*, but *Override Custom Punch* is not enabled, *Custom Punch* will take precedence.



CMS Pay Type Code as Required Field

74847: Previously, the *CMS Pay Type Code* was an optional field on the employee record. If a user forgot to assign a code to an employee, the employee would be left off the CMS reporting.

What's new: *CMS Pay Type Code* can now be set as a required field in the Employee Profile so that employees cannot be hired or have edits made to their record without having a value in this field. To enable this field as a required field, navigate to the *Account Policies* widget under *Company Settings > Global Setup > Company Setup*, then enable *CMS Pay Type Code Is Required*.

Cost Centers

Managed Cost Center

MCC "To Be Completed By" Option for TSCR Workflow

71003: Timesheet change requests can now be processed by Cost Center managers (up to manager 2).

What's been added: *Cost Center Manager* has been added as an option to the *To Be Completed By* drop-down in the *Step Properties: Approve/Reject* step of the Timesheet Change Request workflow.

MCC – Approve TSCR

71226: In order for system admins to regulate MCC managers' access to processing timesheet change requests that contain a particular MCC, a new permission is now available to enable.

What's been added: The option *Approve Timesheet Change Request* has been added to the *Managed Cost Centers* widget (click the edit pencil icon to access *Edit Cost Center Permissions*). If this option is enabled, a To-Do item for the timesheet change request will be generated and sent to the manager of the cost center specified in the change request. The manager can then approve/reject it, and the changes will be reflected on the timesheet. The manager can also access the request from the *Pending Change Requests* report

If this permission **is not** enabled, a To-Do item **will not** be generated for that manager.

Pending Change Requests Report

206127: The number of pending change requests in the *Pending Change Requests* report will now match the number of outstanding My To-Do Items related to timesheet change requests pending manager approval.

Previously, the outstanding change requests in a manager's My To-Do Items did not match the number in this report.

General

Updated TLM HR Actions with New Single Select Lookup

[HR Action] Pay Prep Profile / Workday Breakdown Template – Updated Single Select Lookup

208850, 208849: In Desktop, Mobile, and the Mobile Version on Desktop, the HR Action for assigning a Pay Prep Profile now utilizes single select lookup. In addition, the *Workday Breakdown Template* inside the corresponding HR Action now contains the new single select lookup

OneTouch

OneTouch Smartview Translations

164699 (EPIC): Smartview transactions for the OneTouch will now be translated to the language set in the employee locale from the employee's profile, overriding the clock primary language.

NOTE: If no employee locale is set on the Employee Profile, the translation will match the primary language on the clock.

If users choose a different language on the clock for a transaction, that will override both the clock primary language and the employee locale.

Badge Screen

The Badge screen will match the clock's primary language, but the validation screen will be translated.

Smartview Transactions

The following Smartview transactions will be translated:

Request Time Off (*Time Off* labels will be translated if custom label translations are used)

- Smart Punch
- View Punches
- View Time Off Requests
- View Points
- View Schedule
- Request Timesheet Change
- Submit Timesheet
- View Counters (*Counters* labels will be translated if custom label translations are used)
- View Hours
- View Current Pay Statement
- View Accrual Balance (*Accrual Balance* labels will be translated if custom label translations are used)
- View Piecework
- Exceptions
- Change Cost Centers
- Add Piecework
- To Do Items

Leave of Absence

Removed 365 Day Length Limit on Leave of Absence Cases

6783: Previously, leave cases could not be opened or saved for a date period extending past 365 days.

What's changed: The 365-day limit on leave cases has been removed, allowing cases (both new and existing) to extend past 1 year, with a 10-year limit. An existing leave case can be saved with a start and estimated end date that is greater than 365 days.

Updated All FMLA Forms

Updated FMLA WH-384 Form

212878, 206009: The WH-384 form (under *My Team > Leave > Forms > WH-384*) has been updated to match the most recent version provided by the Department of Labor.

Updated FMLA WH-385 Form

207329, 212571: The FMLA WH-385 Form (*My Team > Leave > Forms > WH-385*) has been updated to match the most recent version provided by the Department of Labor.

Updated FMLA WH-385-V Form

207330, 212572: The FMLA WH-385-V Form (*My Team > Leave > Forms > WH-385-V*) has been updated to match the most recent version provided by the Department of Labor.

Updated FMLA WH-380E Form

204442: The FMLA WH-380E Form has been updated to match the most recent version provided by the Department of Labor.

Updated FMLA WH-382 Form

205988: The FMLA WH-382 form (under *My Team > Leave > Forms > WH-382*) has been updated to match the most recent version provided by the Department of Labor.

Updated FMLA WH-381 Form

212896, 204623: The WH-381 form (under *My Team > Leave > Forms > WH-381*) has been updated to match the most recent version provided by the Department of Labor.

FMLA WH-380-F Form Updated – Added New Fields to Report

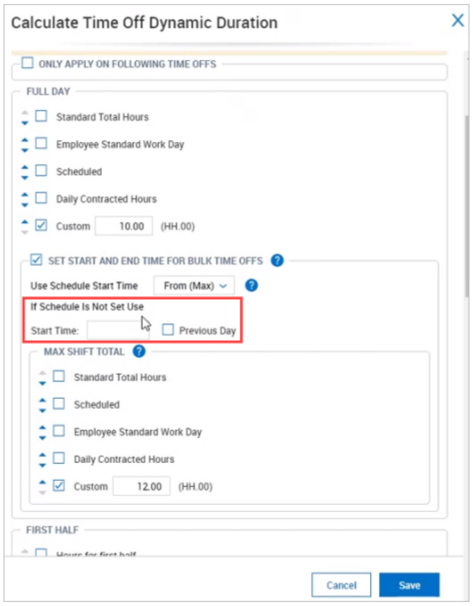
212881, 204621: The WH-380-F form (under *My Team > Leave > Forms > WH-380-F*) has been updated to match the most recent version provided by the Department of Labor.

Generate Calc Start / End Time for Bulk Time Offs

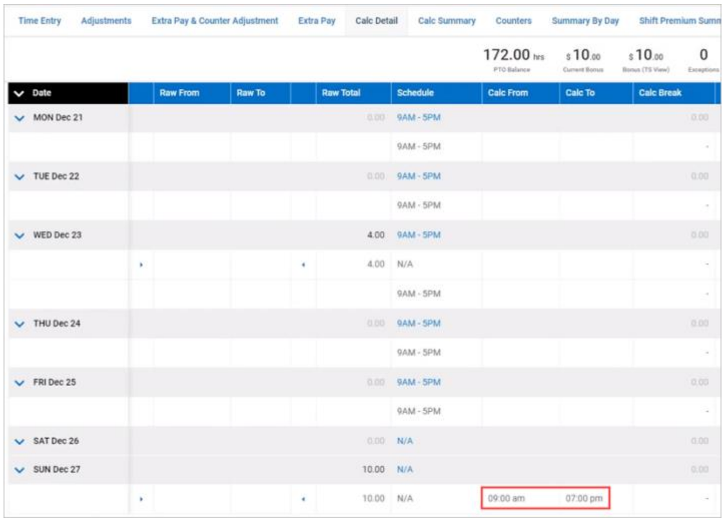
Updated Generate Calc Start / End Time to Allow Users to Specify Start Time Manually and to Use Work Schedule Profile when No Schedule is Present

197548, 208932: Previously, for companies using the *Calculate Time Off Dynamic Duration* Pay Calc 2 rule, when schedules were not populated, or Advanced Scheduling was used in the company, start/end times were not available to populate the calculated start and end times.

What's been added: A new option has been added to the *Calculate Time Off Dynamic Duration* rule in the *Set Start and End Time for Bulk Time Offs* widget, *If Schedule Is Not Set Use*, with a *Start Time* field. In this field, you can enter a time for when the schedule starts for the time off.

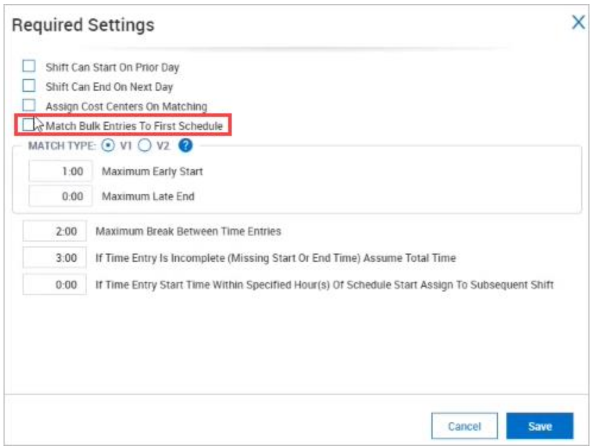


For example, if there isn't a schedule set and you enter 9a in this field, then you select a full day duration for the time off, the timesheet will display the schedule, and in this example, the start time will show as 9 am, and the schedule will assume that the time off will always start at 9 am.



This is useful for companies that do not use schedules, but the user wants time offs to be set at certain times in the day in conjunction with the Pay Calc rule calculating the start and end times.

You also have the option to have the system populate on the timesheet schedules defined in the Work Schedules Profile. From the same Pay Calc rule, select *Use Schedules Defined In Work Schedule Profiles*, then in *Required Settings*, disable the *Match Bulk Entries To First Schedule* setting.



The system will not look at schedules but will pull in the schedule defined in the Work Schedules Profile.

Guaranteed Minimum Hours – Allow 2 Decimals

67839: Previously the Pay Calc 2.0 *Guaranteed Minimum Hours* and *Guaranteed Minimum Hours (Counters)* rules did not allow for two decimal places. Going forward, two decimal places can be added to the *Guarantee At Least* and *Only If Total Work Time Is At Least* fields in these rules.

Chicago Right to Rest Law – Apply Back Pay Hours Only on the Next Day's Shift

207334: Previously, the *Apply Back Pay Hours* rule would only apply to any shift that fell within the *Rest Period* threshold; this rule should also apply to shifts that are within the Rest Period threshold **and** the shift starts on the next day.

What's been added: A new setting, *Apply Only If Next Shift Begins The Next Day*, has been added to the *Apply Back Pay Hours* rule. When enabled, the rule will allocate hours to a specified counter only if the shift that falls into the rest period starts on the next day. If the shift begins on the same day that the previous shift is in, hours won't be allocated.

For example, if an employee works from 3p-11p on Sunday 11/8 and then works from 7a-3p on Monday 11/9, the employee should receive the Rest Pay Increase since the shifts are less than 10 hours apart **and** they occur on separate days.

Daily Overtime – Only Time Off Entries

126718: Users now have the ability to apply daily overtime on a time off day to overtime.

What's been added: A new option, *Time Off Entries Only*, has been added to the *What Counts Toward* [counter] section in the *Daily Overtime* Pay Calc rule. When this option is enabled, Daily Overtime will be calculated only for time off entries.

Time Entry Extra Field Data in Timesheet and Pay Prep Profiles

199597: In Pay Calc 1.0, time entry extra fields are captured by the Pay Prep profile and grouped with exported time entries. Previously in Pay Calc 2.0, there was no way to group a Time Entry extra field with a counter and include the data on payroll export files.

What's been added: *Group by* settings for time entry extra fields have been added to *Counter Records* in pay prep profiles in Pay Calc 2.0.

Points – Added Points Category Filter to “Create Custom Form” Rule

196661: Previously, users could not choose which types of point categories should trigger different custom forms to be created so that they would not have to manually create and assign them when employees’ points balances reached a certain threshold.

What’s been added: A *Category List* option has been added to the *Create Custom Form* Points profile rules. The sum of all categories in the configured list will trigger the custom form to be created.

Personal Rate Table Reason Codes

Rate Tables – Added Reason Code to Rate Table Import Table

202998: The setting, *Require Reason Codes for Personal Rate Tables*, has been added to the Rate Tables import template so that users will be required to add reason codes for personal rate changes if made through the import when *Require Reason Codes for Personal Rate Tables* is enabled globally.

Rate Tables – Include Rate Table Changes in Job Change History Report

201770: Rate table changes and reason codes have been added to the *Job Change History* report.

Rate Tables – Require Reason Codes for Rate Table Entry Changes in Company Settings Import

201778: In the previous release, a global setting was added, *Personal Rate Table Changes Require Reason Codes*, that would require a reason code for every rate table entry change.

In this release, a column has been added for the *Personal Rate Table Changes Require Reason Codes* setting in the Company Settings import template so that users do not have to perform this manually.

Rate Tables

Display Parent/Child CC to Match System Display Settings

183887: Previously in Desktop, Mobile, and the Mobile Version on Desktop, only the last child cost center displayed in the *Rates* table

What’s new: The parent/child cost centers will now display in the *Rates* table, if configured in company settings.

Filter for Active Only Rates in Personal and Global Rate Table

183900: Previously, there was no way to filter through rate tables.

What’s been added: An *All* drop-down has been added to the personal and global *Rates* table to allow users the ability to see all rates. You can also choose to see only Active rate tables or Inactive rate tables. This will allow users to easily find the currently used rate, especially for companies with many rates.

Reports

Deprecation – “Time Entry Approval” Setting in Detailed Hours Overview Report

206436, 208951: In the Mobile Version on Desktop, the *Time Entry Approval* setting in the *Detailed Hours Overview* report is no longer supported.

Mass Data Export

Added Columns to Company Report: “All Punches Summary”

211620: *Gender* and *Ethnicity* are now available columns to add to the *All Punches Summary* report in Mobile and the Mobile Version on Desktop (*My Reports > System Reports > System Utilities*, select *All Punches*, then toggle the current view to the *Summary View*) and Desktop (*My Reports > System Reports > System Utilities > All Punches > All Punches Summary*).

PAR Reporting

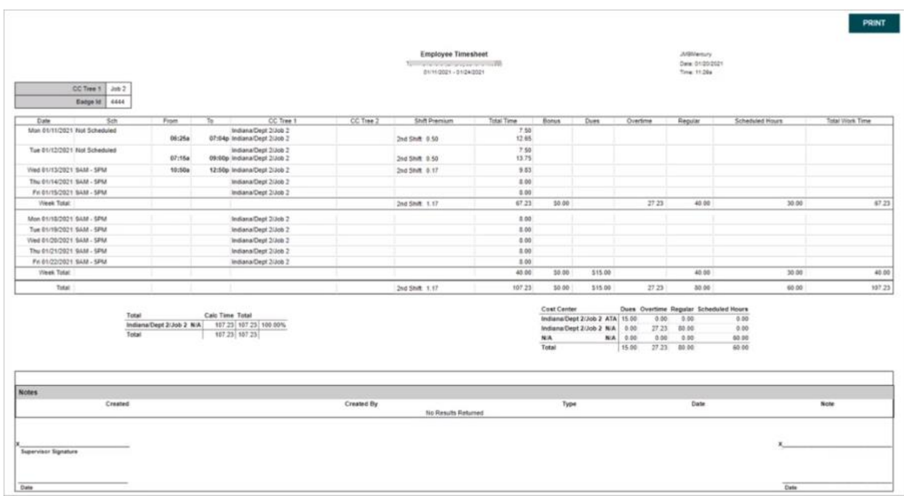
PAR Reporting in Printed Timesheets – Main Table / Extra Pay & Counter Adjustment / Summary Table

199209, 212493, 212492: The Personnel Activity Report (PAR) is required for school districts K-12 that are being funded by multiple sources and one of the sources is a federal grant. This reporting is a federal mandate for teachers and the school to report on time percentages and dollars that are spent in the grant.

The printed Timesheet report will now include the needed information for PAR such as the hours worked by cost center, as well as the dollar amounts and percentages in a summary table.

From the timesheet, click the three-dot ellipses button, then select *Print*. If *Extra Pay & Counter Adjustment* is enabled in the Timesheet Profile, an *Extra Pay & Counter Adjustment* widget will display in *Print Settings*. A *Counter Summary Totals* option is available to enable, which will display Percentages and Cost Centers to enable.

In addition, an approval history and attestation statement will display on the report.



Detailed Hours Overview – Report / Embedded “View Timesheets” Report from Detailed Hours Overview

182700, 213342: The non-PDF version of the *Detailed Hours Overview* report is now available in Mobile and the Mobile Version on Desktop under *Team > Time > Reports > Time Allocation > Detailed Hours*

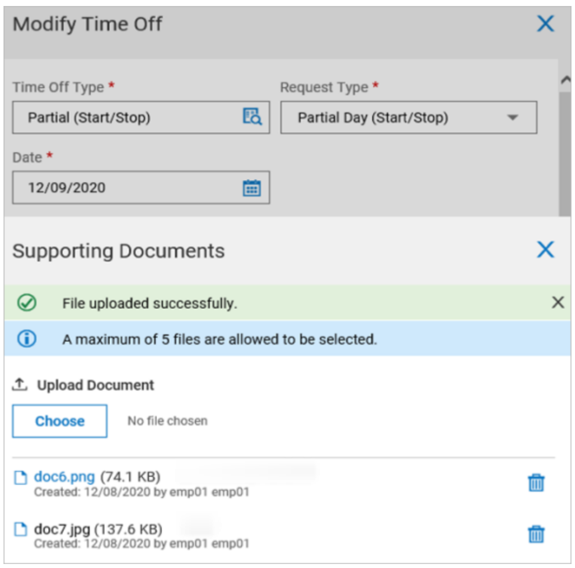
Overview. You can select the cells from this report to get to the timesheet. When selecting multiple employees and clicking on the *View Timesheets* button, you will be directed to a separate report with the appropriate employee/date filters.

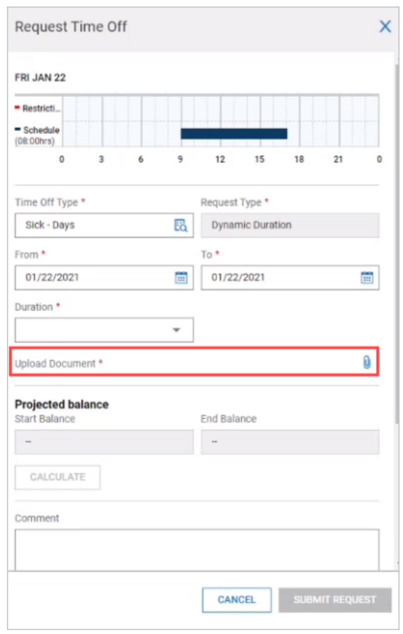
Time Off

Added Document to Request Time Off / Modify Time Off

Attach/Delete Documents in Time Off and Modify Pop-Ups

198074, 208097: An *Upload Document* section with a paperclip icon now displays above *Projected balance* in the *Time Off Request* pop-up, and is also available in the *Modify Time Off* pop-up if the setting, *Employee Can Attach Document*, is enabled in the *Settings Per Time Off* widget of the Time Off Request Profile.





Security Settings for Time Off Documents

211225: From the Security Profile, under the *TLM* tab, a new section has been added, *Time Off Documents*. From here, you can give permission to *View*, *Add* and/or *Delete* Time Off Documents.

Require Attachments

198570, 209202: Managers can require users to submit an attachment in order to track the reason for their time off.

In the Time Off Request profile, within the *Default Settings* section, a new setting has been added, *Request Require Attached Document*. When enabled, a red asterisk will display next to *Upload Document*, indicating that it is a requirement for the user to upload a document with their time off request, otherwise they will not be able to submit the request. The trash can icon to delete **will not** display so that users cannot delete the required attachment.

Settings Per Time Off

209204: In some cases, managers will want attachments required for specific time off requests, but for other time off requests, they may not want an attachment required.

For users with the *Request Require Attached Document* setting enabled, when you configure the time off setting in the *Settings Per Time Off* widget, you can specify for each time off type if employees can attach documents and if that should be a requirement by selecting *Yes* or *No* next to *Employee Can Attach Document* and *Request Requires Attached Document*.

For example, this will allow you to configure a time off for Sick that requires employees to attach a document in order to submit a time off request, while a time off for Vacation would not require employees to attach a document.

To-Do Items
198077: Managers can view attached Time off Documents in their *My To Do Items* to properly track the reason for taking time offs. A *View Documents* link is available to click within *Approve/Reject Time Off Request* in *My To Do Items*.

Attached Documents in Time Off Reports
198079: Any attached documents in time offs will be included in all time off reports (*All Open*, *Pending Time Off*, and *Approval History*). You can add the *Attached Documents* column to these reports, which will display the paperclip icon with the number of attachments associated with that time off. Click the icon to access the attached document(s).

Delete and Edit Hidden for Attached Time Off Documents in Employee Documents
215155: From the *Employee Documents* report, employees will only be able to view/download the attached documents, not edit/delete. The only reports with attached documents that can be deleted are from time off management reports.

Adding Time Off Documents to Timesheet
198078: For approved time offs with documents attached, *Time Off Documents* will be an available option to select in the open timesheet from the three-dot ellipsis action button. When this option is selected, a *Time Off Documents* pop-up will display with information about the attached documents, as well as the ability to download the documents.

To allow users to select the *Time Off Documents* option from the timesheet, navigate to the Security Profile and enable under *Reports*, *Employee Time Reports: All Time Off Documents*.

Time Off Request

Time Off Request – Timeline in Request Time Off Pop-Up
118645: In Desktop, Mobile, and the Mobile Version on Desktop, the timeline will now display in the header of the *Request Time Off* pop-up for the requested range. This will make requesting time off easier because users will not have to refer back to the Time Off Calendar to make sure they do not have any restrictions or are scheduled on the day

Updates Table of Functionality Added to Pages

The table below shows updates in the **Mobile Version on Desktop** and the functionality added.

Ticket or (EPIC)	Product	Componen t	Functionality Added	Desk-top	Mobile	Mobile Version on Desktop
203065 (Epic)	TLM	Rates	The columns in an employee's Rate Table that display assigned rate tables are now links. When clicked, the user will be navigated to the applicable rate table.	Yes	Yes	Yes
203065 (Epic)	TLM	Reports	The *Detailed Extra Pay* reports will now include links under the Employee EIN column to the *Detailed Extra Pay* and *Extra Pay Summary* reports (*Team > Time > Reports > Extra Pay*).	Yes	Yes	Yes
203065 (Epic)	TLM	Reports	The *Overtime Request* report will now include links under the Employee EIN column to the *Overtime Requests* report (*Team > Time > Reports > Audit Trail*).	Yes	Yes	Yes
203065 (Epic)	TLM	Reports	The *Attestation Workflow* report (*Team > Time > Reports > Audit Trail*) now includes	Yes	Yes	Yes

Ticket or (EPIC)	Product	Componen t	Functionality Added	Desk-top	Mobile	Mobile Version on Desktop
			the Button: ***View Workflow*** and Button***: View Details***.			
100626 (Epic)	**TLM**	**Reports**	The ***View Workflow*** icon has been added to the report under the ***View Workflow*** column (***Team > Time > Reports > Attestation Questions and Answers)***.	**Yes**	**Yes**	**Yes**
203065 (Epic)	**TLM**	**Reports**	The workflow names under the ***Workflow Name*** column will now be links (***Team > Time > Reports > Audit Trail > Attestation Question)***.	**Yes**	**Yes**	**Yes**

Scheduler

NEW Work Schedules in Advanced Scheduler

Previously, Work Schedule Profile was only available for TLM Basic Scheduling.

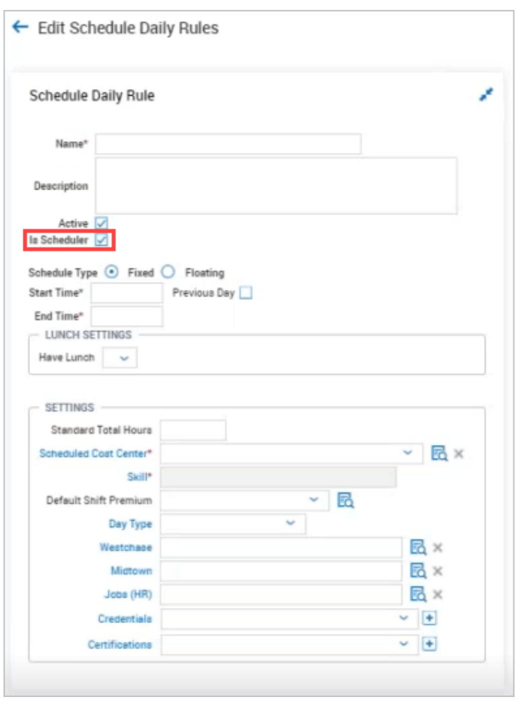
What's changed: The Work Schedule Profile is now available for Advanced Scheduling. This is beneficial for employees who have a static schedule or recurring schedule patterns and do not need the engine to auto assign their shifts from week to week. Utilizing Work Schedule Profiles will save time and manual work.

Below is an example of a schedule with shifts automatically assigned on an ongoing basis based on a configured Work Schedule Profile.

Added Scheduler Fields to Daily Rules and Work Schedule Profile

206408, 210491: To start creating a Work Schedule Profile, you first need to build a Schedule Daily Rule. Navigate to *Edit Schedule Daily Rules*, under *Company Settings > Profiles/Policies > Schedules > Daily Rules*. A checkbox, *Is Scheduler*, has been added to the *Schedule Daily Rule* widget, which will make the Daily Rules and settings only used for Advanced Scheduler scheduling and not TLM Basic Scheduling.

IMPORTANT NOTE: Once *Is Scheduler* is enabled and saved, this cannot be undone.

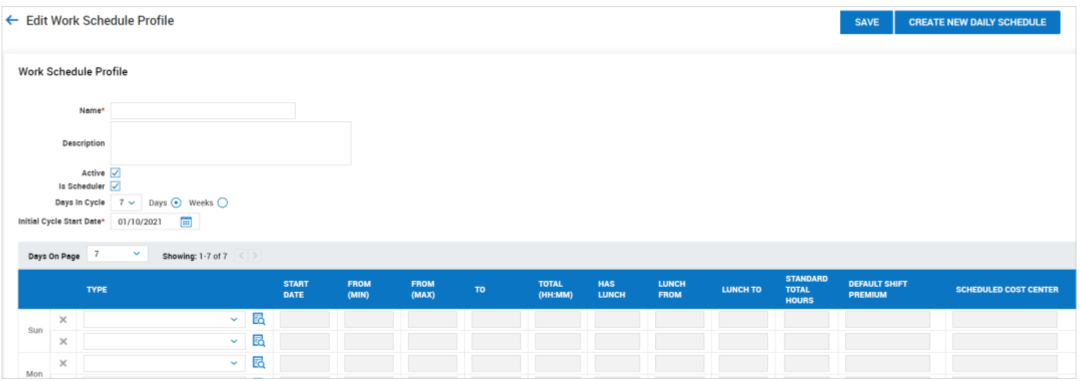


When *Is Scheduler* is enabled, the following Scheduler shift attribute fields will be available in the *Settings* section:

- *Standard Total Hours*
- *Scheduled Cost Center* (required)
- *Skill* (required)
- *Default Shift Premium*
- *Day Type*
- *Jobs (HR)*
- *Work Schedule Cost Centers*
- *Credentials*
- *Certifications*

Next, you will need to create a Work Schedule Profile from *Company Settings* > *Profiles/Policies* > *Schedules* > *Work Schedules*. From *Edit Work Schedule Profile*, the *Is Scheduler* option is available to enable, which will change the columns to match what was configured in the Daily Rules.

You can define shifts for up to 364 days or 52 weeks from *Days In Cycle*. In addition, from the *Type* column, you still have the option to build shifts at any time by choosing *Fixed* or *Floating*, otherwise you will choose from any of the daily rules that were marked as *Is Scheduler*.



Assigning Scheduler Profile and Work Schedule Profile in Employee Profile

206423: Previously, when an employee was assigned a Scheduler Profile and a Work Schedule Profile, a warning message displayed, letting the user know that the Work Schedule Profile would be ignored because TLM Work Schedules Profiles did not work in Scheduler.

What's changed: Because you can now assign a Scheduler Profile and a Work Schedule Profile to an employee, the warning message will no longer display, and you will be able to successfully assign both if needed.

Added "Convert Work Schedule To Shifts" Rule in Schedule Settings / Create Scheduler Shifts Based on Work Schedules

206421, 206422: In order to control when the system should use Work Schedules to create shifts on schedules, a new shift creation rule has been added to *Schedule Settings* (under *Company Settings* > *Schedule Setup* > *Schedule Settings*) called *Convert Work Schedules To Shifts*. Click the *Add Shift Creation Rule* button then select this rule.

When this rule is added, the system will automatically create and assign scheduled shifts to employees based on an assigned Work Schedule Profile so that you will not have to manually assign these shifts.

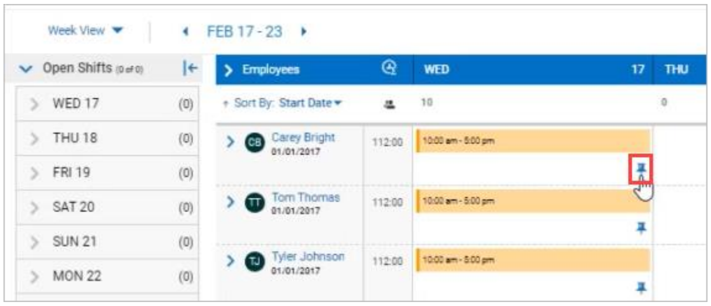
If a Cost Center from the Daily Rule assigned to a Work Schedule Profile differs from a Cost Center on the Schedule to be created, the shift created based on the Daily Rule will be skipped.

NOTE: This rule is only available for Scheduler + TLM companies.

The system will assign shifts to employees based on the cycle date of the work schedule profile and cycle length and start date of the schedule. Shifts will be created and assigned to employees based on daily rules in the work schedule. Shift dates will be based on the work schedule cycle date, schedule cycle length, and start date of the schedule.

When using a Work Schedule Profile, all engine functionality is still available: constraint violations will be triggered when applicable by the engine; if an employee cannot work a shift, the shift can still be posted as an open shift for employees to request; shift swaps and coverage requests can still occur; assigned shifts will be frozen to employees so that they are not considered by the engine for auto assignment.

In the event that you have employees that you need to bring in and use the Workload template and engine for, you can do this and use the open shifts to auto assign without disturbing any previously assigned shifts that were created in the Work Schedule Profile by clicking the pin frozen icon under the shift.



Added "Is Scheduler" Column to Daily Rules and Work Schedules Profile Reports
210519: For companies with Daily Rules and Work Schedule Profiles defined as *Is Scheduler*, an *Is Scheduler* column has been added to the *Company Daily Work Schedules* and *Company Work Schedule Profiles* reports. The Y (for yes) or N (for no) under this column will allow users to easily identify which rules and profiles are used for Scheduler.

Updated Schedule Daily Rules Import for Scheduler
206888: In order to be able to import Scheduler daily rules, the following fields have been added to the *Schedule Daily Rules* import template:

- Is Scheduler
- Require Scheduled Cost Center
- Skill
- Credentials (if the HR subsystem is enabled)
- Certifications (if the HR subsystem is enabled)

Adjusted Time Off Display in Day View (Bulk Type Only)

207335: Previously, Bulk time off on the schedule Day View would only display when the timeframe for the day was between 12a-8a for a full day or partial day (bulk) time off. This could be confusing to managers, as it indicated that the employee was only off during those hours but may be available outside those hours.

What's changed: The Bulk type of time off will now display in the Day View for all hours of the day, no matter which hours are filtered on the schedule, so that managers can always see that the employee has a time off.

Display and Action Updates to Schedule Views

Added Start Time in Sort Option in Week and Month Views

187253: In the R68 (May 2020) release, a sort option in the Day View was added, *Shift Start Time*. When selected, the schedule will be chronologically ordered by the earliest shifts to the latest, along with the option to sort ascending or descending.

In this release, this feature has been made available for the Week and Month Views.

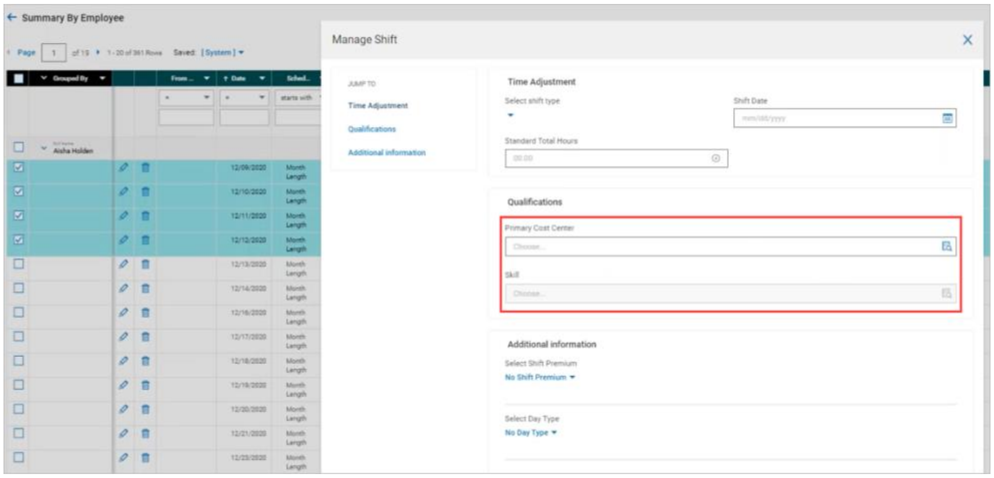
Shift Color Now Displays in Entire Shift Box

181142: Previously, skill colors displayed on the edge of shifts in schedules.

What's new: Skill colors will now fill in the entire shift box in schedules, as well as shift boxes in the *Open Shifts* panel, the employee row, *Employee Schedule Detail* (*Scheduled* and *Qualified Open Shifts* sections) and *Schedule Details*. The filled in color will also apply to print and PDF versions of the schedule.

Mass Edit Cost Center and Skills Fields

209995: In the *Summary By Employee* report, when managers mass edit shifts, they can now choose a *Primary Cost Center* and *Skill* to mass edit from the *Manage Shift* pop-up so that they no longer have to make individual shift changes for cost centers and/or skills.



Mass Edits Pushed to TLM in Real Time

209998: Mass edits to shifts on posted schedules will now be sent to TLM automatically so that users do not have to run TLM shift creation rules manually. Changes will be reflected in the employee's timesheet, the employee's schedule, and all TLM reports that contain shift data.

Show Time Off Types Name in Weekly Schedule Report

197054: Previously, the *Weekly Schedule* report showed that there was time off and the number of hours, but it did not display the name of the time off type.

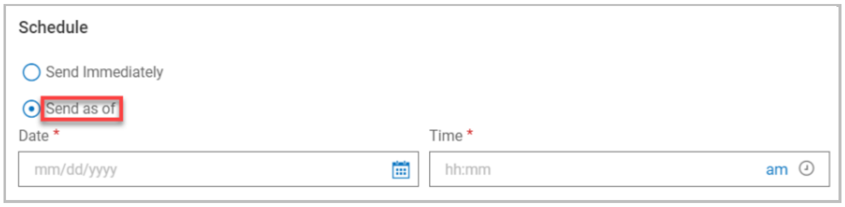
What's changed: The name of the time off type is now available to display on the *Weekly Schedule* report. A new setting has been added in the *Settings* section of Time Off Properties, *Show Name in Weekly Schedules*. This setting will be disabled by default. If you do want the time off name displayed, enable this setting.

General

Broadcast Messaging/Twilio

Send Broadcast Messages as of Certain Date/Time

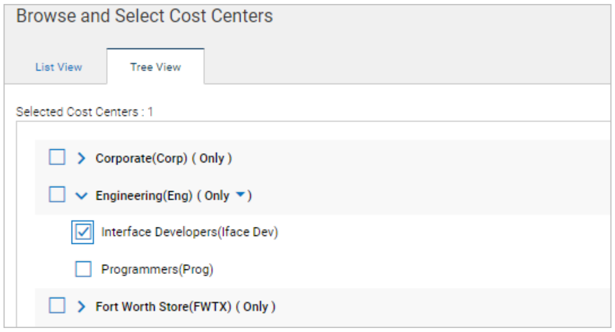
185793: Admins or managers can now send a Broadcast Message to employees either using an existing template or by creating a new message, allowing them to communicate in a faster way through the system. When sending out a Broadcast Message to employees, the option to specify when to send (*Date* and *Time*) the message is available in the *Schedule* section.



Cost Centers

Tree Filtering for Cost Centers in Employee Profile Widgets

190600: In the *Browse and Select Cost Centers* lookup pop-up, cost center tree views have been added. These pop-ups display when adding a cost center. You will now see a ***Tree View*** tab where you can navigate to the desired cost center and then select it.



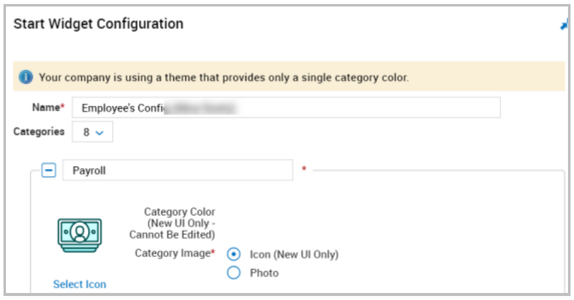
Cost Center Lookup: View Accounts Column in Single Select Lookup

198059: More Cost Center related columns have been added to each lookup for consistency. The *View Accounts* column in single select lookups is now supported in Cost Center lookups, and when clicked, it returns the specific accounts associated with that Cost Center assignment.

Start Widget - Remove the Read-Only Color Box For All Themes Except Standard

215721: When the Look & Feel (New UI) Theme field is set to Teal (*Company Settings > Global Setup > Look & Feel > System Themes*, *Theme* selector in the *Look & Feel (New UI)* widget is set to **Teal**), and an end user can view the Start Widget in a tab within the Dashboard, the *Category Color (New UI Only - Cannot Be Edited)* label no longer displays the **read-only color box**, which contains the hex code of the selected theme's primary color. The same positioning of the label is maintained in each category, and the text is wrapped in multiple lines.

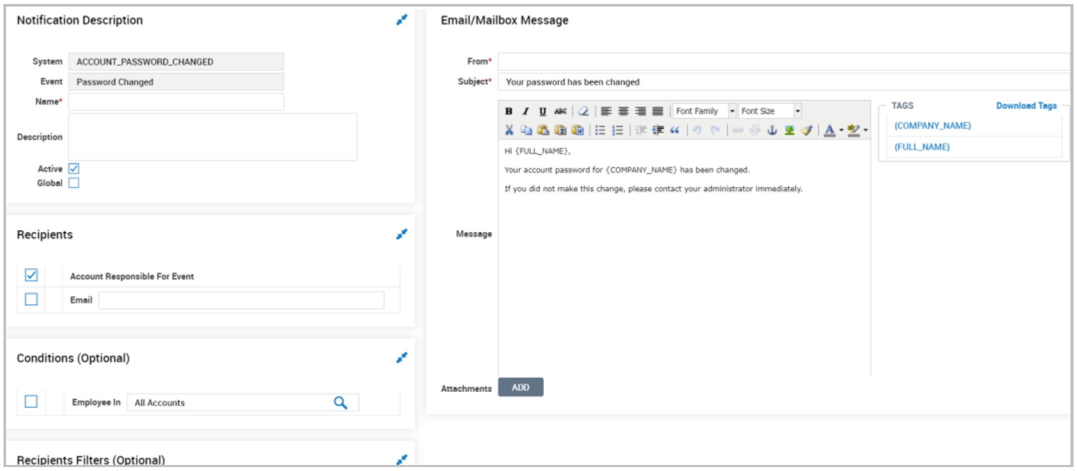
An informational message displays at the top of the Start Widget Configuration page when a theme other than the Standard (New UI) is selected for a company. The message reads: *Your company is using a theme that provides only a single category color*.



NOTE: New UI themes do not affect the Classic Dashboard (premium dashboard) Start Widget.

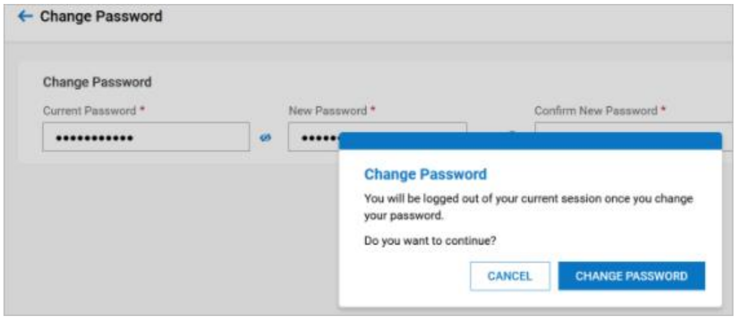
Notify Users that their Password was Changed

148958: A new notification, *Password Changed*, is now available and can be configured and sent to employees to notify them when their account password has been changed.



Warning to User When Changing Passwords

200777: When a user changes their password, the next action they take logs them out of the system. Previously, this occurred without warning. We have now added a warning message, so the user is prepared for the automatic log out.



Reports

Row-Level Actions in Report/Chart Tiles

203082: Row-based actions that were previously not yet supported for certain reports when they were placed in Report/Chart tiles are now supported. These columns no longer appear without the icons, and users can now execute a particular action (i.e., Edit, View, Preview, etc.). Work is in progress to address any remaining not yet supported actions in upcoming releases.

Scrolling with Page Up/Page Down Buttons

204071: Users can utilize the Page Up and Page Down buttons, as well as the Up/Down/Left/Right arrow buttons, from the body of the report to scroll through any report in the system with enough data.

Complex Employee Lookup - Saved List(s)

Edit List Popup with Members

202668: Users with access to one or more reports with the Employee Filter functionality can now view a list of Members for existing Saved Lists in the Employee Filter. When at least one Saved List is selected, when a user clicks on the *Name* of a Saved List on the *Selected* Tab, the *View/Edit <Saved List Name>* pop-up appears with focus on the *Selected* Tab. The user views a list of employees belonging to the Saved List in the *Employees* table.

Users can remove employees from selection, add Employees/Groups/Profiles/Advanced Filters/Saved Lists to the selection and save the updated selection as a new list upon clicking *Save List As*. When the user Saves the new list, it appears:

- On the *Available* tab, Saved Lists in the Edit/View list pop-up.
- On the *Available* tab, Saved Lists in the Browse/Select Employee pop-up.

Selections made in the View/Edit Saved List remain on the *Selected* tab. When a user closes the Edit/View Saved list pop-up, the user will return to the Browse/Select Employee pop-up on the Selected tab the user triggered the View Saved List action from.

Edit List

202667: Users can now overwrite Saved Lists in the Employee Filter of one or more reports. When a user has access to one or more reports that provide Employee Filter functionality, the user can edit the Saved List membership from:

- The *Available* tab, Saved Lists: *Add Column*, upon clicking on the Edit row level action.
- The *Selected* tab, Saved Lists table, upon clicking on the *List Name*.

Users can trigger the Edit Saved List action, then open the View/Edit Saved List pop-up on the *Selected* tab and view the list of employees included in the Saved List the user is editing within the *Employees* table. Users can also remove employees from the selection, add Employees/Groups/Profiles/Advanced Filters/Saved Lists to the selection, and Save the updated selection, which overrides the previous membership of the list upon clicking *Save* in the footer of the pop-up.

If there is a mixed selection (Employee(s)/Profiles/Groups/Advanced Filters/Saved Lists), when the user clicks *Save*, a confirmation message appears to indicate that the selection will be converted to a static Saved List.

Filter Out All Employee Types Except Regular

213755: A Holiday Profile may be assigned to not only Regular, but also internal employees such as Applicants. When a Saved list was created based on a selection including the Holiday Profile, the Saved List members showed a counter which included not only Regular, but also internal employees.

Now, upon saving the list either through creation or updates via editing, all Employee Types are excluded from the selection except for Regular employees. Internal employees such as Applicants are removed from the list's members to ensure users can view accurate counts on the *Saved List* tab and the actual number of employees selected for viewing data in a report.

Link for Non-Editable Saved List (Deleted & Shared)

215085: Users cannot edit deleted Saved Lists or Saved Lists s/he does not own.

> If a Saved List used as an Employee Filter is deleted, when a user opens the *Selected Tab* of the Employee Selector, the deleted Saved List does not provide a link to View/Edit the Saved List members.
>
> If a user shares a Saved Report View to a Saved List of employees, when the users who get access to the Shared View open the *Selected Tab* of the Employee Selector, the Saved List does not provide a link to View/Edit the Saved List members.

NOTE: If a user selects their own Saved List, a link to View/Edit the list is provided.

Delete Saved List & Display Saved List (Deleted) on Selected Tab

207233: Users can delete a Saved list so they can eliminate obsolete lists using the delete column in the *Available > Saved Lists* tab. When the *Delete* action is clicked for a Saved list that is applied in the Employee Filter, when the Saved list is deleted, an inline informational message on the Selected Tab of the Employee Filter pop-up explains: *<List Name> is deleted, but selection is retained for use in saved view*. If a user shared the view with the list of employees, when the user deletes the view, employees from the list still can access the shared view.

Embedded Reports Hidden in Mobile Application

213428: Saved Views of embedded reports are visible on the My Saved Reports page in the Desktop environment, but hidden on the Mobile Application. When a user saves a view in the Desktop environment of an embedded Monthly/Weekly/Yearly Birthday Calendar, then:

> **Desktop** - User can view and run the Saved View via My Saved Reports.
>
> **Mobile Application** - User cannot view the Saved View of the embedded Monthly/Weekly/Yearly Birthday Calendar on My Saved Reports.