Software Release Notes

# OnePoint Human Capital Management

Release Notes R74 - April 2021

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## Supported Operating Systems and Browsers

**Note:** All of these operating systems and browsers are supported, but some may not be actively tested.

| Platform | OS Version |
|---|---|
| | |
| Windows | 10 |
| Mac | 10.13.4 (High Sierra) |
| Mobile | |
| iOS | 11.4.1 -> latest |
| Android | 6.0.1-> latest |

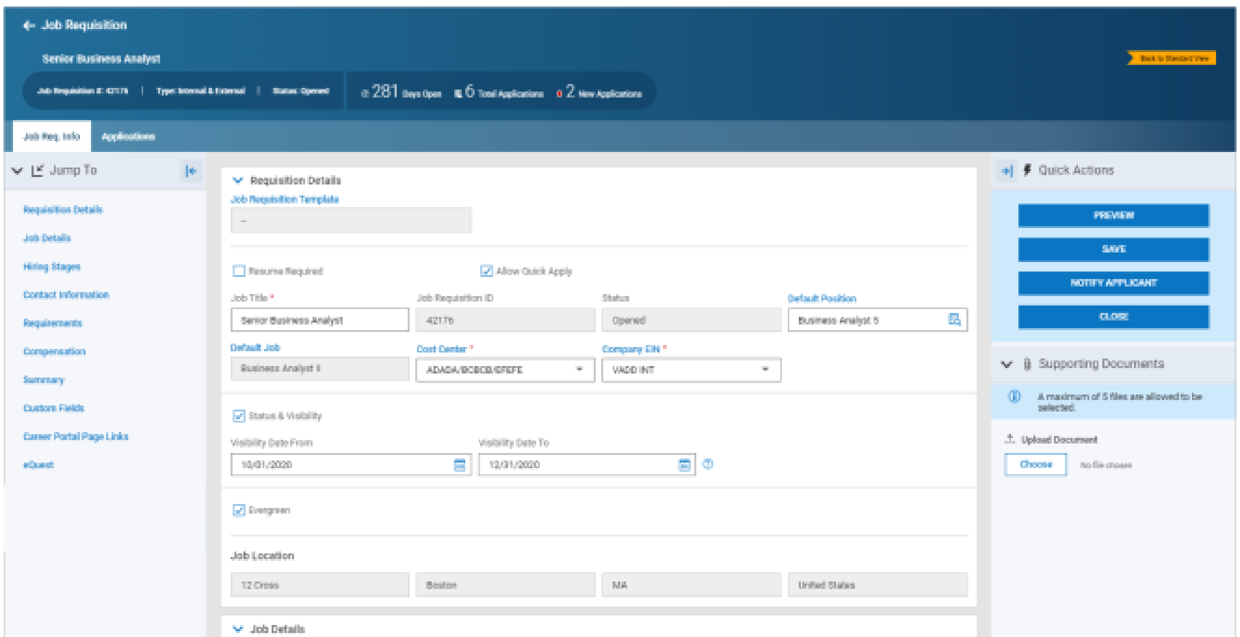
| Browser | Version |
|---|---|
| Internet Explorer | 11 |
| Microsoft Edge | latest |
| Google Chrome | latest |
| Mozilla Firefox | latest |
| Safari | latest |

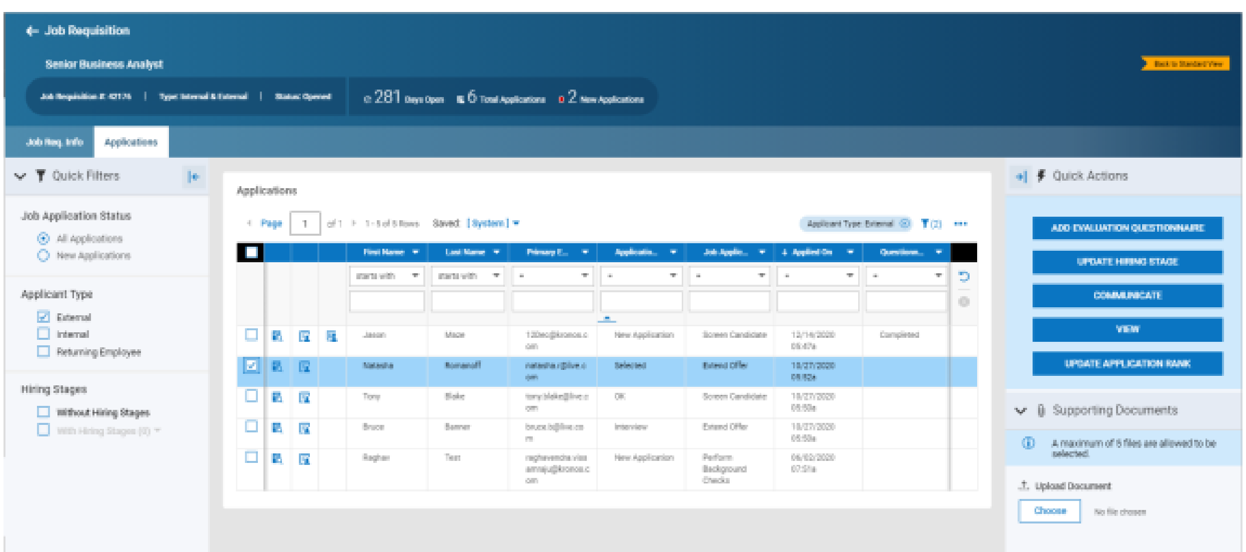
# Human Resources

## Workspace Design in Job Requisitions

The workspace is a new optional design to provide flexibility for managers and recruiters to perform their day to day activities efficiently by ensuring they can stay focused inside the workspace rather than navigating to multiple menu items to perform various tasks in the process of identifying a suitable applicant.

The new design will work on the desktop as well as a mobile device. The workspace is optional and is controlled by a security setting. You will navigate to the Job Requisition report page under Team > Recruitment > Job Requisitions. From there, you will select or create a job requisition and on that page you will see the option to switch to the new workspace once the security permission is set.



## Security Permission to Enable New Workspace

You can enable users by security profile to have access to the new workspace. Once enabled, they will see a banner when opening or creating a Job Requisition in the Job Requisition menu under Team > Recruitment > Job Requisitions. The setting is on the HR tab of security profiles in the Recruitment section. In the Job Requisitions permission, check View Workspaces.

After opening or creating a job requisition, the banner toggle will display. Users will click the Try the New Workspace banner to open the new workspace. To return to the old view, users will click the Back to Standard View banner. In the Standard View, you will navigate through the menu structure to access each area.



> **Note:** If using the .hcm URL in your desktop experience, you must enable the option via security profiles. If using the .home URL in your desktop experience, the new workspace will be enabled by default. It will also be enabled by default for the Mobile App.

## The New Workspace

### New Header

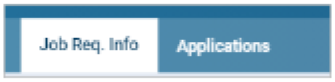
In the new workspace, a header will display showing the currently selected Job Requisition. If multiple requisitions have been opened, you will be able to scroll through the selections and the scrolling controls will show how many are selected.

A summary for the current view will display showing how many days the requisition has been open, how many total applications are active for that requisition, and how many of that total are new applications. This view will be available on both the Job Req. Info and Applications tabs.


### New Tabs

The workspace has two tabs under the header; one is the Job Req. Info tab, and the second is the Applications tab. The system will default to the Job Req. Info tab.

In the desktop experience, each tab is divided into 3 panels. The panels will vary slightly depending which tab is selected and whether you are viewing a job requisition or an application.



**Note:** In the mobile app, the same options are available but are presented in single panels due to spacing issues on the device.

### Job Req. Info Tab

This tab contains the following panels:

**Left Panel:** Jump To links - these are only available in the desktop experience

The jump links will pop you to the selected widget within the job requisition.

Center Panel: Job Requisition Details (users with proper access can edit) - this panel is always open and cannot be minimized/closed

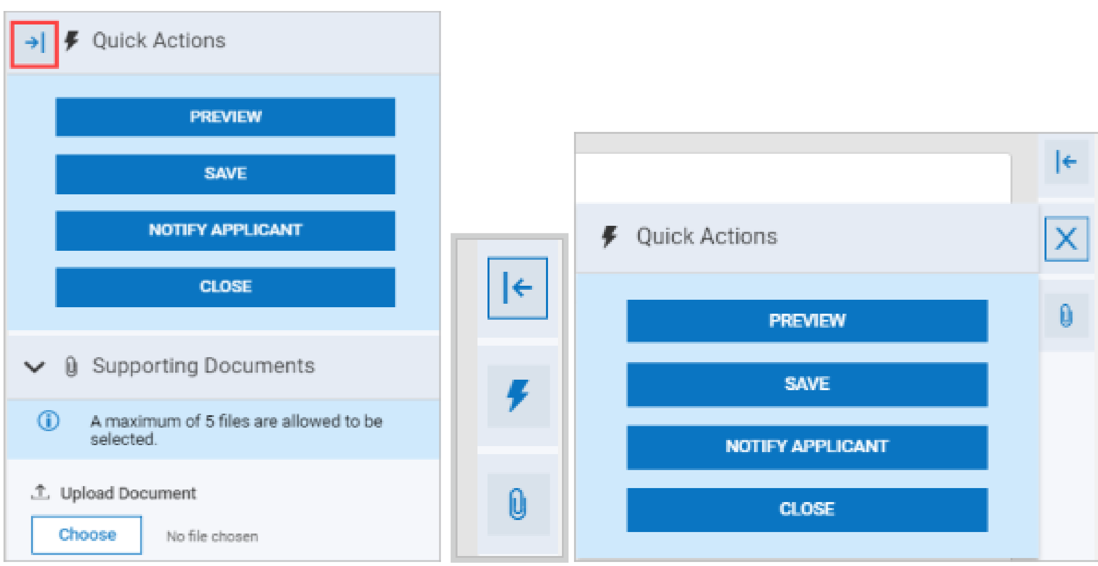
This section contains all the details of the selected job requisition. Users with proper permissions can view and edit the content here.

**Right Panel:** Quick Actions and Supporting Documents

This panel contains Quick Actions which allow you to select options Preview, Save, Notify Applicant, and Close the job requisition.

The Supporting Documents section of this panel allows you to add up to 5 supplemental documents for the selected job requisition.

The left and right panels can be hidden or minimized and then popped out again. When minimized, the options within that tab will still be accessible in their collapsed view and will be shown as icons with hover text available to show what those icons do. For example, Quick Actions has a lightning bolt icon. When collapsed, just the icon will show, and users can click the icon to open just that option. When users are done with their task, they can click the X icon to return to the minimized view. To re-open the panel, users will select the left-facing arrow icon.



### Applications Tab

The left and right panels on this tab can be hidden or minimized just as they can on the Job Req. Info tab. The tab contains the following panels:

**Left Panel:** Quick Filters - can be minimized/closed

The left panel allows you to apply filters such as All Applications, New Applications, External applicants, Internal applicants, and Returning Employee applicants. Additionally, within Quick Filters, you can select applications based on Hiring Stages.

Center Panel: Applications (flowing from Job Requisition report page) - this panel will always be the default and cannot be minimized/closed.

The center panel contains the report page for viewing and managing applications.

**Right Panel:** Quick Actions and Supporting Documents - can be minimized/closed

The panel has Quick Actions that become active one you have selected one or more application from the Applications section of the center panel. Options here allow you to manage the selected applications. You can select Add Evaluation Questionnaire, Updating Hiring Stage, Communicate, View, and Update Application Rank.

The Supporting Documents section of this panel allows you to add up to 5 supplemental documents for the selected applications.

## Account Contacts

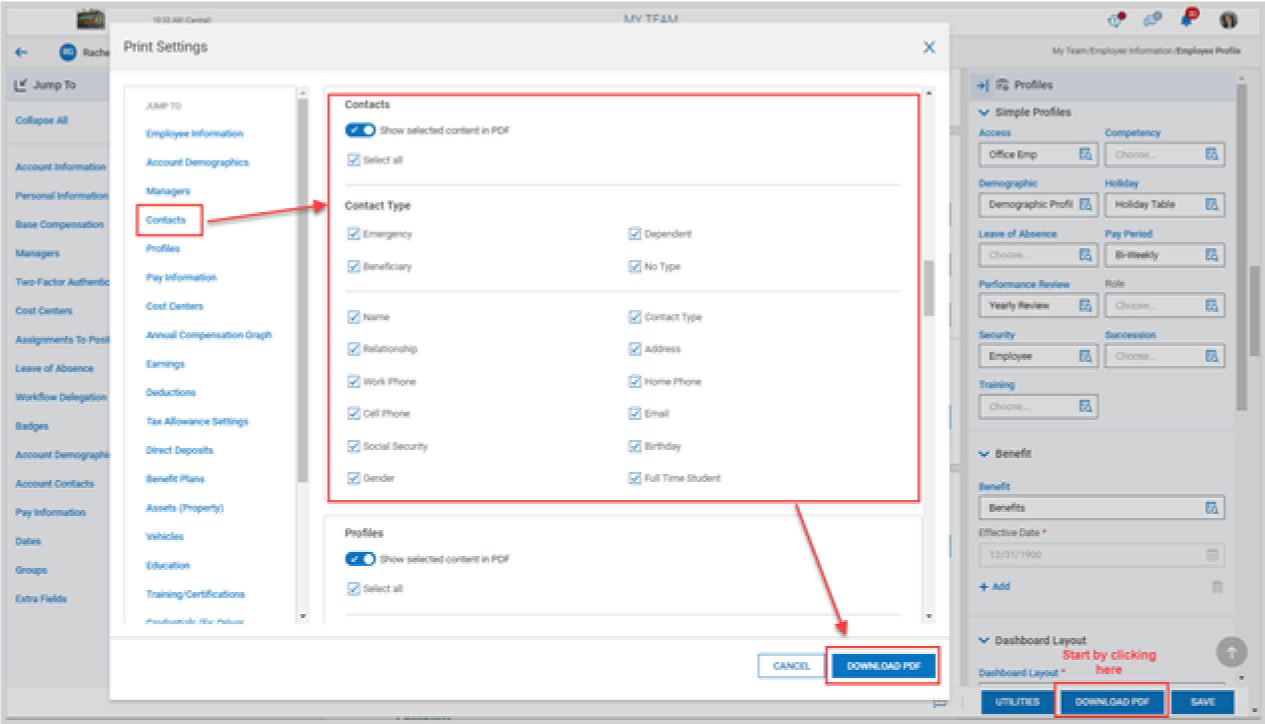
### Employee PDF – Hiding Non-Visible Account Contacts in Downloaded PDF

217673: In the February 2021 HR Release Notes, we added an Account Contacts widget in Company Settings where you can require, hide and display fields in the Account Contacts widget in employee profiles.

> **Note:** For more details, please download the February 2021 HR Release Notes and refer to the Account Contacts write up.

In this release we are hiding the contact type fields that are not marked to display in the Account Contacts widget in Company Settings.

> **Example:** After clicking the Download PDF button and selecting the Contacts widget in Print Settings, you can select or de-select Contact Types to be included in the PDF. Any contact types that are not enabled in Company Settings will not display as an option in the Print Settings page. Conversely, if a contact type is checked under any contact type or default, it will display as an option on the Print Settings page.



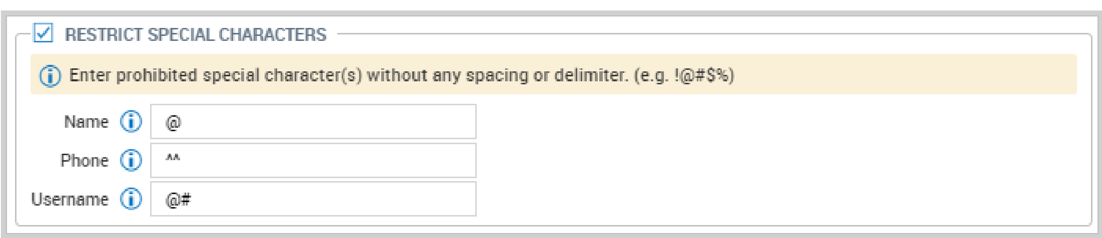

## Company Settings

### Restriction for Special Characters in Employee Profiles

**223230:** A new widget, Restrict Special Characters, has been added to the Company Settings (in Account Policies) where employers can turn the validation on and prohibit special characters for the following fields, listing which special characters are prohibited.

- Name – This includes all Name fields such as First Name, Middle Name, Last Name, Nickname, and Suffix.
- Phone – This includes all phone fields such as Work, Cell, and Home.
- Username

An informational message explains that the special characters should be entered without any spacing or delimiter such as a comma.




Only Special Characters are allowed in all fields under the Restrict Special Characters settings section. An error message displays when the validation fails explaining that RESTRICT SPECIAL CHARACTERS must contain special characters only. The maximum length of each field in the Restrict Special Characters section is 35 characters.

For the values under the Generate Username Format and Username sections under Restrict Special Characters, the fields should not have the same characters in both fields simultaneously. An error message displays if the validation fails explaining that there are Conflicting values under Generate Username Format & Username section under RESTRICT SPECIAL CHARACTERS.

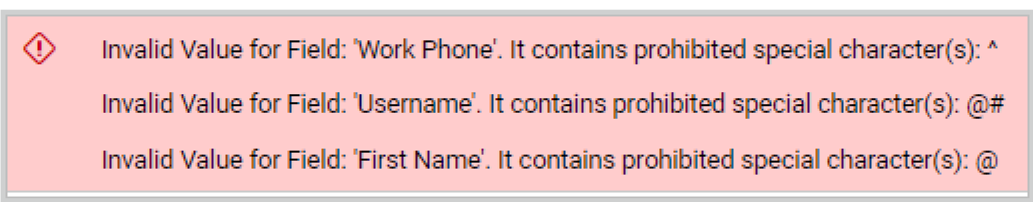
The two validations described above also apply to the Mass Edit functionality . In addition, the following validations also apply when using the Mass Edit feature:

When the Generate Username Format value is filled in and the Username section under Restrict Special Characters is not filled in, the Generate Username Format value is validated against the saved Username value in the Restrict Special Characters section for that company. If the validation fails, a message displays stating: Generate Username Format has prohibited characters in {Company Name}.

When the Username value under Restrict Special Characters is filled in and the Generate Username Format is not filled in, the Username value is validated against the saved value of the Generate Username Format in the Restrict Special Characters section for that company. If the validation fails, a message displays stating: Username section under RESTRICT SPECIAL CHARACTERS has prohibited characters in {Company Name}.

**210494:** If Restrict Special Characters is enabled in Account Policies and prohibited special character(s) is/are entered on the employee record (ESS and MSS), an error message displays indicating the special characters are invalid. Fields such as the following are validated against the Special Characters widget in Account Policies:

- First Name
- Middle Name
- Last Name
- Nickname
- Suffix
- Username
- Phone numbers (Work Phone, Home Phone and Cell Phone)




**215678:** Users will receive an error message indicating the special characters are prohibited when clicking Save after entering special characters via the Employee Import that are listed in the Restrict Special Characters widget for the field(s). Fields such as those listed below are validated:

- First Name
- Middle Name
- Last Name
- Nickname
- Suffix
- Username
- Phone numbers (Work Phone, Home Phone and Cell Phone)

For fields that are not required such as Middle Name, Phone Number, etc., users will receive a Warning if they are listed in the Restrict Special Characters as prohibited. The import will occur, but the fields with warnings will not be included.

> **Note:** In an Employee Import, an Error displays if there is a prohibited special character in a Required field such as Username, First Name, Last Name, etc., and the system will not allow the record to be imported at all. A Warning will display for a prohibited special character in a field that is not required such as Work Phone, Home Phone, Cell Phone, etc., and the system allows the record to be imported and update the data. Fields with prohibited special characters are skipped. If there are existing validations for any of the fields, the existing validations display first and then the new special character validations display next.

**215679:** When users enter special characters via HR Actions for the list of fields below, and those special characters are listed in the Restrict Special Characters widget for the field(s), they will receive an error message when clicking Save indicating the special characters are prohibited.

- First Name
- Middle Name
- Last Name
- Nickname
- Suffix
- Username
- Phone numbers (Work Phone, Home Phone and Cell Phone)

## Custom Forms

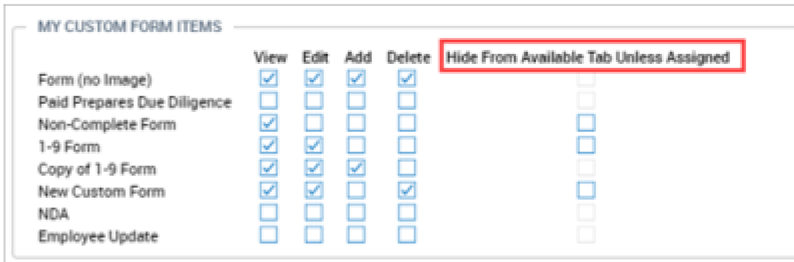
### New Security Permission to Hide Custom Forms in Available Tab

**198309:** A new security setting has been added that can hide custom forms on the Available tab unless the custom form has been assigned to the user. This solves the problem of sensitive custom forms being visible to all users who have access to custom forms.

The Hide From Available Tab Unless Assigned setting has been added to the My Custom Form Items widget under the ESS tab of security profiles. For it to be active, the form item must be enabled with the View setting as a minimum.

When the hide setting is checked, only users assigned to that custom form will see it on the Available tab of custom forms under Team > HR > Forms > Other Forms. These users will also see it on the Open tab since they have been assigned to the form and once submitted on the and Submitted tab. Once the form is submitted, it again is not visible on the Available tab with this setting enabled.

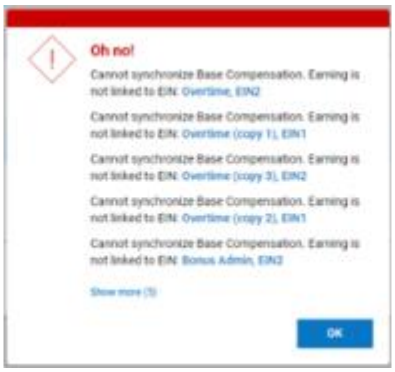
- The hide option is available for View, Edit, and Delete only.
- Is a user has Add permission, the hide option is not activated since the Available tab is required in order to add a form.




## Employee Profiles

### Employee Sync Profile: Link Provided in Error Page

**214501:** When synching an employee profile and an error is received, a link to the page in question will be provided in the error pop-up. Clicking the link will take you to that page so you can correct the error. For example, if the profile cannot be synced because it is not compatible with the earning selected, the link would redirect you to that earnings page.




## HR Actions

### Effective Date Badge (InTouch) Fields Added to HR Actions

**188897:** Effective Date Badge fields (for Onetouch) are now available in HR Actions.

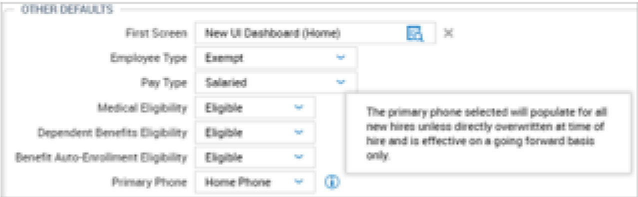
### Primary Phone Default Setting Added to Hire HR Actions

**218329:** In the February 2021 system release, we added an option in Company Settings where you can designate the default primary phone to be either the Work, Home or Cell Phone upon hiring through the manual hire process or via imports. We also added the ability for employees to designate a default phone number via a My Information HR Action.

> **Note:** For more details, you can reference the February HR Release notes and search for the title of Company Settings and under that title these three tickets explain the functionality: 207775, 16682, and 207766.

In this release, we are extending the hire functionality via an HR Action. This will be done in the My Employee Action Request with sub type Hire. Within that HR Action, you can now add the Primary Phone action item. Whichever phone is selected as default in Company Settings when hiring an employee or applicant through the HR Action, the system will use that default unless the user overwrites it in the Primary Phone drop-down in the Hire HR Action.

Additionally, the Info icon verbiage in the Primary Phone field, located in the Other Defaults widget of Company Setup on the Defaults tab, has been edited to reflect the release of this functionality.


### TLM HR Actions with New Single Select Lookup

**208848, 208846, 208844, 208843:** A new single select lookup is available in the Pay Calculations field within HR Actions. In addition, the new single select lookup is available in the Browse and Select TS Auto Population Profile, Time Off Planning Profile, and Holiday Table pop-ups within HR Actions.

## Lookup List Updates

### Benefit Plans Details Page Updated with Employee Lookup

**218667:** The Benefit Plans Details page in the mobile experience has been updated with an Employee lookup. Formerly, this page contained an employee selection drop-down. The new lookup will open the standard application Browse and Select Employee report pop-up, which gives you greater control over the employee selection list. This page is accessed under Team > Benefits > Benefit Plan Details.

### Company Asset Lookup Replaced with Report Based Lookup

**211650:** When assigning assets to employees under Team > HR > HR Maintenance > Assets Assignments, the Company Asset field lookup has been replaced with a report page style lookup to give greater control over the asset list. Formerly, this field contained a drop-down style lookup. This lookup will also be available if assigning assets via an HR Action.

### Vehicles Lookup Replaced with Report Based Lookup

**211650:** When assigning vehicles to employees from the Vehicles widget of their employee profile accounts, the Company Vehicle field lookup has been replaced with a report page style lookup to give greater control over the vehicle list. Formerly, this field contained a drop-down style lookup.

### HR Action Items Lookups Replaced

**208771:** The lookup for HR Action items Default Workers Comp Code, Labor Distribution Profile and Pay Period Profile have been updated to a single select style. Users/managers can open their HR Action and from the lookup for these items, select a single item for that action item.

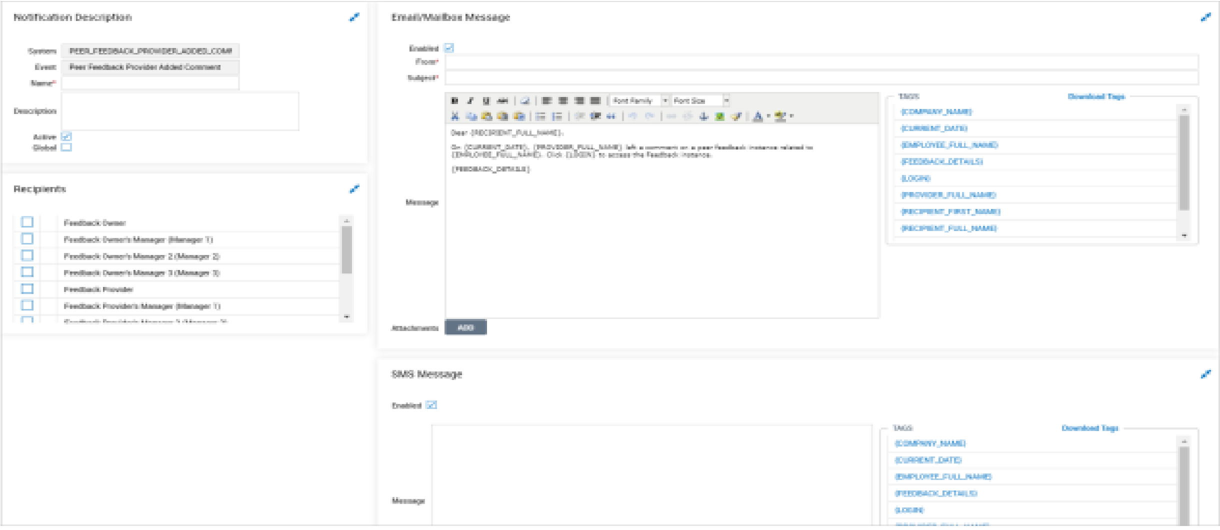
**226019:** The Vendor lookup when editing a deduction in the Deductions widget of an HR Action, has been updated to a single lookup.

## Peer Feedback

### New Notification When Provider Gives Feedback

218140: A new Peer Feedback Provider Added Comment notification has been added to the notifications maintenance area, located under Company Settings > Global Setup > Notifications, in the Peer Feedback category. This notification will trigger each time a provider gives feedback and can be sent as a message to the manager of the employee and/or the manager of the provider. The notification will also work with the SMS Twilio Marketplace product (if enabled) and an SMS message can be added to the notification.

- Recipients can include one or more of the following:
- Feedback Owner (Employee)
- Feedback Owner's Manager (Employee's Manager)
- Feedback Provider
- Feedback Provider's Manager
- Group (a company group)
- User (a specific user)
- Email (a specific email address)



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## Recruitment - General

### Applicant Created Dates & Applicant Hired Dates in Multi EIN Companies

**222642:** Previously, the system was updating the created dates of the applicant record when an applicant was hired in a multi EIN environment. The applicant created date was not retained, and users could not run a report to show the time an applicant was in the system before being hired. To address this issue, the following changes have been applied.

- Created date on the Applicant report reflects the original date the applicant record was created and will not update to the date the applicant was hired into the system.
- Created date on the Employee report reflects the date when the employee record was created, i.e. the date the applicant was hired in the system.
- Added the "Applicant Created" column in the Time to Hire report.
- Renamed "Created" column to "Employee Created" on the Time to Hire report.
- This is not retroactive and is only valid going forward.

### Icon Changes in Recruitment Pages

**216231: 216231:** Some updates have been made to the icons in several places in Recruitment. These changes primarily affect the View or Edit functions. The updates are as follows:

- Job Requisition Report Page: View Job Requisition - Pencil icon
- Job Application Report Page: View Job Application - Pencil icon
- Job Application Report Page: View Job Requisition - Briefcase on page icon
- Job Application Report Page: View Questionnaire - Question mark on paper icon
- Questionnaire Answers Report Page: View Applicant - Employee Profile icon
- Questionnaire Answers Report Page: View Job Application - Person on page icon

### Job Requisitions: Recruitment Filters Added for Job Applications

**201558, 201559, 201550:** Multiple filters have been added to the Global filters when navigating to the Job Applications page within the Job Requisition report page.

> **Note:** These options are available in both Standard View and the New Workspace. The navigation path listed below is how to access these filters in Standard View. The options in the New Workspace will be available from the Applications tab in the Quick Filters panel.

- Hiring Stages - These filters provide options of selecting and filtering job applications with or without hiring stages.
- Applicant Type – These filters provide options of selecting and filtering job applications by applicant type External, Internal, and Returning Employee.
- Job Application Status – These filters provide options of selecting and filtering job application by All Applications or New Applications.

**Navigate to:**

1. Team > Recruitment > Job Requisitions
2. Click the View Job Requisition icon to navigate to the Job Requisition details page.
3. Access the applications via the Applications jump link.


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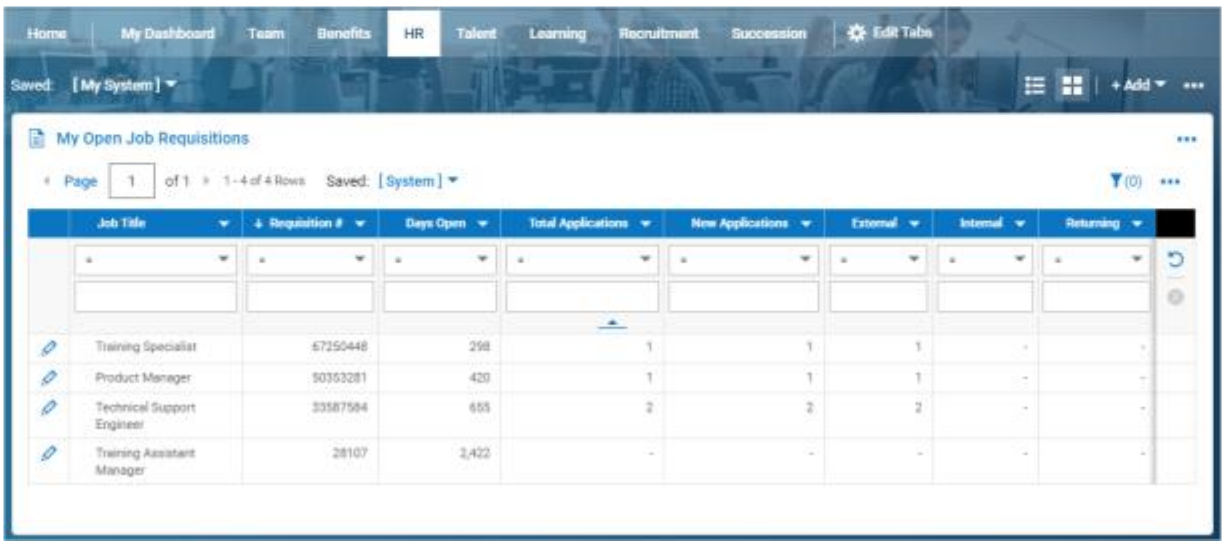
4. From the Applications widget, click View Report option from the ellipsis.
5. Click the funnel-shaped Filters icon. The filters will display on the Global tab.

### Job Requisitions: New Dashboard Widget - My Open Job Requisitions

**217227:** A new My Open Job Requisitions widget is available to be added to your dashboards. The widget will show all open job requisitions. When selecting one of the requisitions from the widget, the requisition will open for viewing and/or editing. On this page, if the new Job Requisition Workspace has been enabled, users can select the banner to open the new workspace and work with that open requisition and related applications there (see details about the new workspace in this document.) Selecting the back button will return the user to their dashboard. Selecting the hyperlinked title of the widget will open the Job Requisition report page and will show only your open requisitions.

Users must have security enabled for the Job Requisitions permission, with View as the minimum setting. This is set in the Recruitment section of the HR tab in security profiles.

Users must also have security enabled for dashboards. In the Dashboard Widgets section, located under the Dashboards tab of security profiles, ensure the users have permission to this widget. Select either All or Custom. If selecting Custom, select the Permissions button and select the dashboard widgets the users can see and use.




## Workflows

### Collect Note Options Added to Approve/Reject Step of Custom Form Workflows

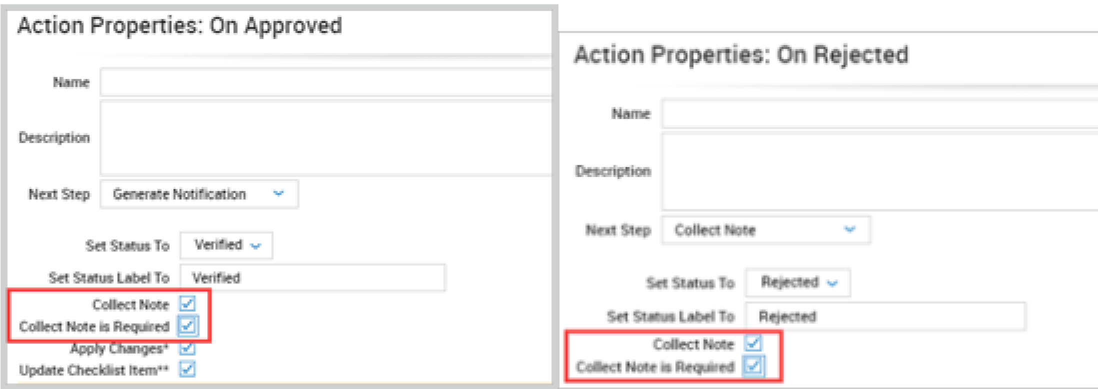
**212197:** Historically, the Collect Note step in a Custom Form workflow is used so managers can add a note during the workflow process. This step in a workflow results in another To Do Item for the manager. In this release, we are adding configuration options to combine the approve or reject process with the collect note process.

In the Accept/Reject step of Custom Form workflows, a configuration option to collect a note has been added, along with an option to make it required. With these options, when a manager does the approval or rejection, they can add the note in that same step without receiving a separate Collect Note To Do Item.

The new configuration options are disabled by default.

- When Collect Note is enabled, upon clicking Approve and/or Reject from the To Do Item, a pop-up will appear where the user can enter their note for the approval and/or rejection.
- When Collect Note is Required is enabled, the user must enter a note when doing the approve/rejection in this pop-up and will receive a message that a note is required if they attempt to approve/reject and a note is not entered.

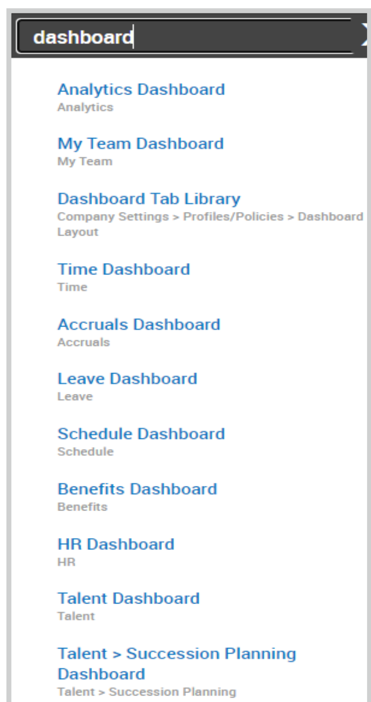
The note added will appear to both employees/applicants and managers in areas they access where notes can be viewed.




## Domain Dashboards Renamed

When searching for "Dashboard" in the main menu, all Domain Dashboards appeared in the search with the same name, which looked confusing. Now the Domain Dashboards have been renamed and appear in the menu as follows:

- HR Dashboard
- Talent Dashboard
- Succession Planning Dashboard
- Learning Dashboard
- Compensation Dashboard
- My Team Dashboard
- Recruitment Dashboard
- Payroll Dashboard
- Time Dashboard
- Accruals Dashboard
- Leave Dashboard
- Schedule Dashboard
- Benefits Dashboard
- Analytics Dashboard



## New! Company Hub Dashboard Layout Configuration

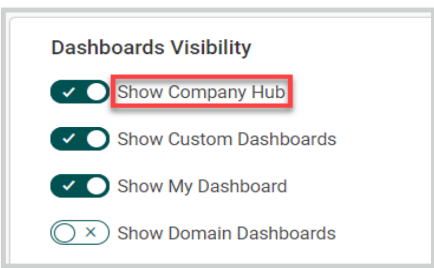
A new Dashboard Layout Configuration setting, Company Hub, gives your company a way to communicate and provide vital resources to your people. This option has been designed to deliver branded content to build unique company experiences. A single adaptable display pulls all your key organization-level information into one place for your employees. News feeds, embedded videos, and helpful links can communicate company standards, culture, and announcements.

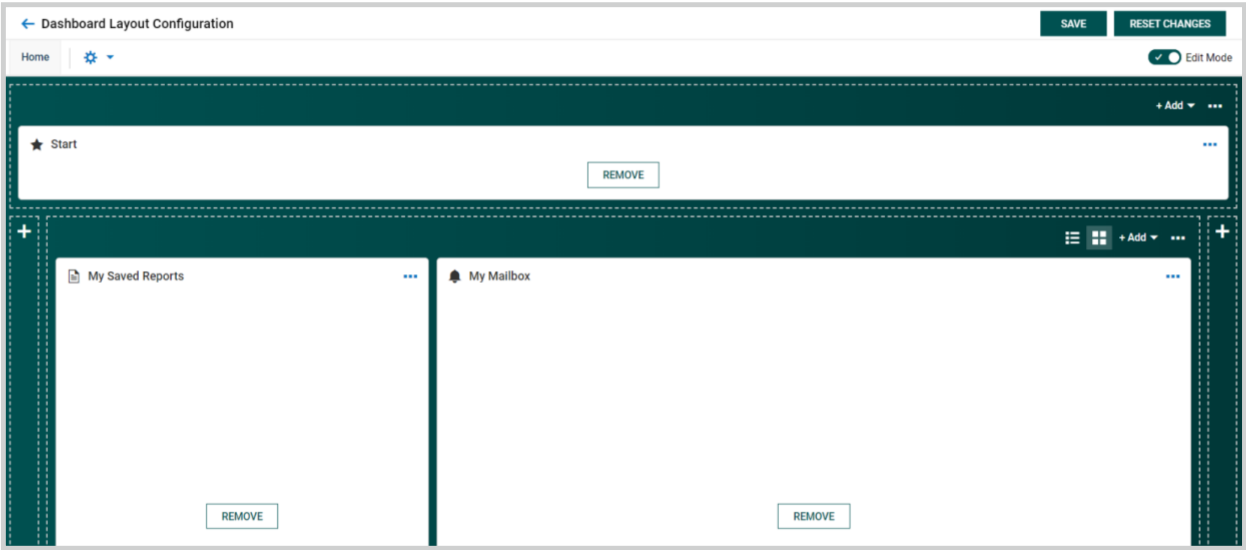
Quick-start templates and formats make it easy to create views that match your organization's needs. This new experience provides specific widgets alongside customized Content widgets, allowing for up to 20 widgets per tab. With the Content widgets, this provides an Intranet within the Dashboard that is a read-only experience for end users.

The new setting/option, Show Company Hub, is now available in the Dashboards Visibility section of the Dashboard Layout Profiles. When this option is enabled and a user selects Edit for one of the Schedules, grid lines outline different sections to be included in the layout when Edit Mode is on. The following sections can be added to the layout:

- Top Section
- Left Section
- Middle Section
- Right Section

By enabling Edit Mode, the layout includes the ability to add/configure the new sections on each individual tab so they will appear on the Dashboard as desired. In Edit Mode, the size of sections are fixed.



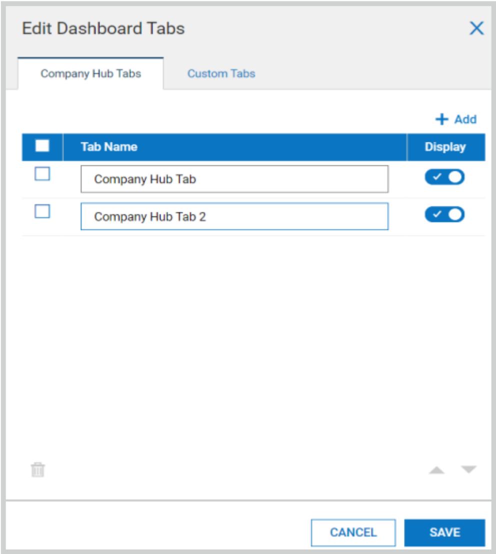



## Company Hub Tabs on the Dashboard Configuration Page

Admins can add Company Hub tabs to the Dashboard Layout Configuration so they can create specific content for end users. By clicking the gear icon in the header of a Dashboard, the Edit Tabs option appears in the drop-down and when selected, opens the Edit Dashboard Tabs dialog page with options for:

- Company Hub Tabs: The functionality below is available for the Company Hub Tabs:
- + Add: To add a new Company Hub tab
- Select Row(s): To select existing tabs
- Tab Name: Tab Names can be edited here
- Delete: Once at least one existing tab is selected, the trash can icon is available to delete a tab or tabs.
- Display Toggle: Enabling this tab displays the new Company Hub Tab on the Dashboard Layout.
- Up and Down Arrows: Use these to re-arrange the tabs
- Custom Tabs: The same options are available for the Custom Tabs.

By clicking Save in the pop-up, a new empty tab will appear on the page. The Company Hub tab displays by default, and it will be the first tab in the Dashboard header.



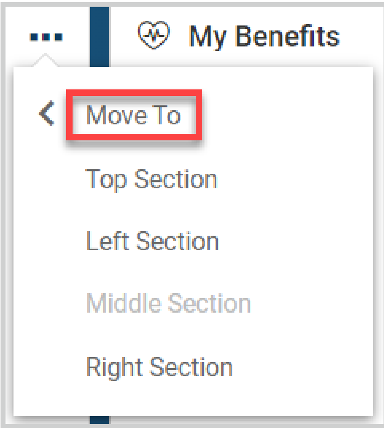

## New Widget Notification With New Grid

The new widget notification provides users with dialogue when new widgets are available, and it allows the user to add widgets directly to tabs. When multiple sections are present in the new grid, if a user chooses to add a widget via the new widget notification dialogue, the content is placed in the middle section of the new grid Dashboard Layout.

## Move To Functionality for New Grid

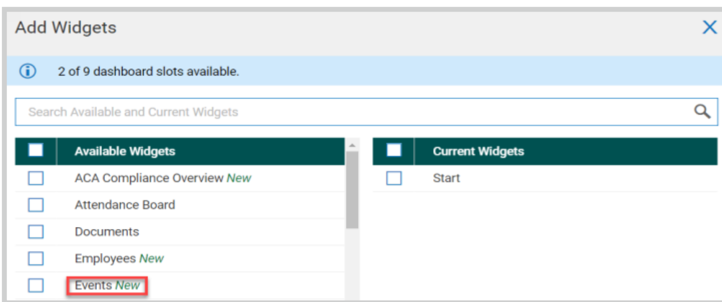
Users can move existing tiles to a different section so they can organize all information in a specific order. When a tile has been added to a section within a Dashboard Layout Profile (Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles, select View/Edit Dashboard Layout Profile, Edit the appropriate Schedule), a tile with an ellipsis menu is presented on the Dashboard. Clicking the ellipsis menu exposes a drop-down list with a Move To option with the following options:

- Top Section
- Left Section
- Middle Section
- Right Section




## Events Widget Added to List of Available Widgets on the Company Hub Tab

Where the Add Widgets pop-up is presented on the page, the Events widget is now included in the list of Available Widgets, and can be selected to add to the Company Hub tab.



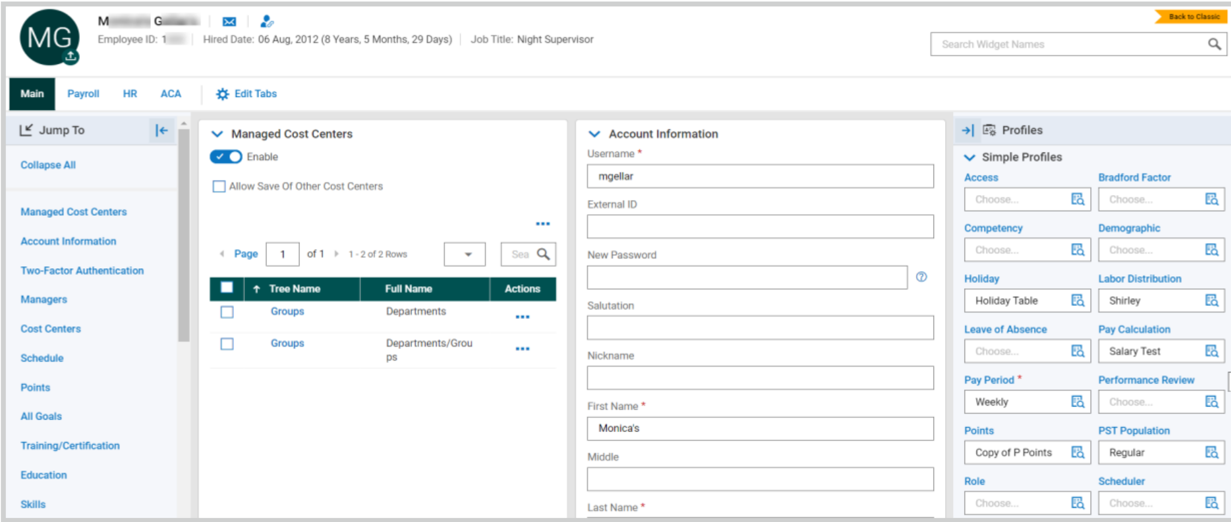

## New! Employee Profile Redesign

**The functionality described below was already available for all customers. It was enabled the week of March 19th, 2021.**

Based upon your valuable feedback, the Employee Profile (My Team > Employee Information), My Profile and Applicant Profile pages have has been redesigned to provide users with universally helpful features and functions desired by customers. The redesigned workspace includes:

- A compact view that optimizes the Desktop experience to allow multiple columns of widgets to be displayed, thereby reducing scrolling.
- A flexible layout that allows users to close unused widgets.
- The ability to collapse the Jump To panel.
- A dedicated Profiles panel that persists across tabs to allow configuration of Profile fields while referencing other contents on the page.

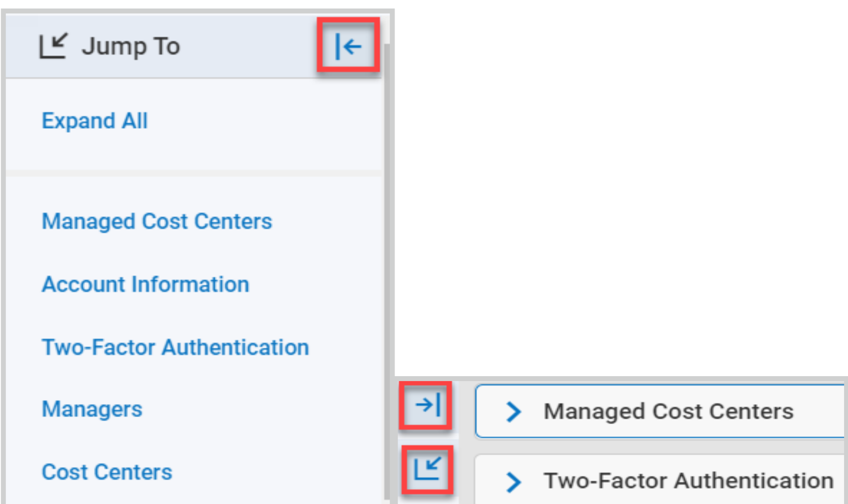
**A Jump To Links panel** now displays along the left hand side. A section with general widgets is positioned in the middle of the page, and Profiles now display on the right hand side.

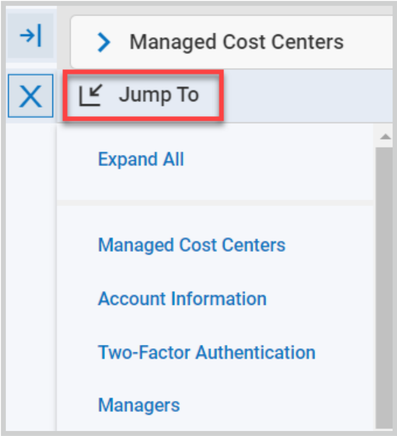



Jump To Links (left panel)

This panel includes links that allow users to "jump to" specific sections/widgets within the center of the page.

- This also applies to My Profile and the Applicant Profile.
- This section can be opened/expanded and closed/collapsed using the left/right arrow in the upper right hand corner. When the section is collapsed, it can be accessed via the Jump To icon.






- Users can expand all widgets and collapse all widgets in the center section via the top link in this section (Expand All or Collapse All). The selection a user makes (Expanded or Collapsed) is saved when the user leaves and then returns to the system.

# Time and Labor

## NEW Time Prep (Mobile)

Time Prep has been converted to the Mobile App. All general Time Prep functionality is the same, with the following new features:

- The Time Prep process is adaptive to all screens, and all functionality can be performed on any device
- Processes are grouped by Type to more easily navigate Time Prep
- Steps will visually be marked as completed via a visual task bar at the top of the screen so that users can identify progress through the payroll process
- Mass Process Pay Periods

For TLM companies with the Payroll module enabled, Time Prep can be accessed from the Menu under Payroll > Time Prep, and for companies without Payroll enabled, Time Prep can be accessed under Payroll > Process & Export.

### Time Prep Overview

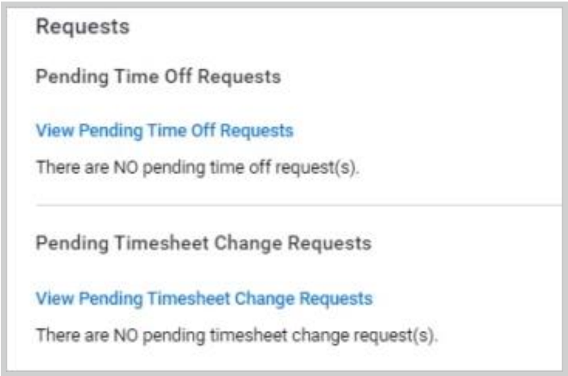
From Process & Export, click the Pay Period Functions icon, which will take you to the Time Prep screen.

If you have multiple pay periods that you need to process, select the three-dot ellipsis, then select Add/Remove Columns. Add the Select Pay Period column, select the check box at the top to select all pay periods on the page, then click the Mass Process button.

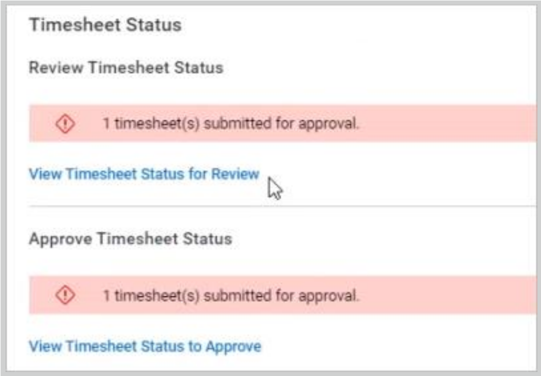
All errors and warnings will display at the top for each step in the process, followed by requests. If you are mass processing, all errors and warnings will display for the selected pay periods, and you can view the dates from the Selected Pay Periods drop-down.

### Business Process Steps Overview

When you select the View Pending Time Off Requests link, you will be taken to the new All Open Time Off Requests screen. Underneath this section, you can click the View Pending Timesheet Change Requests link, which will navigate you to the Timesheet Change Requests Pending Approval screen.

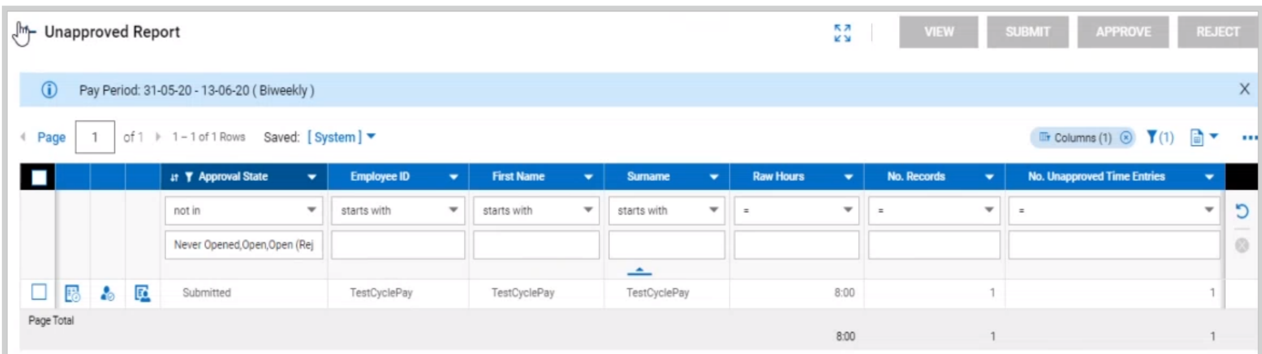


The next business process steps available are Timesheet Status and Approve Timesheet Status.



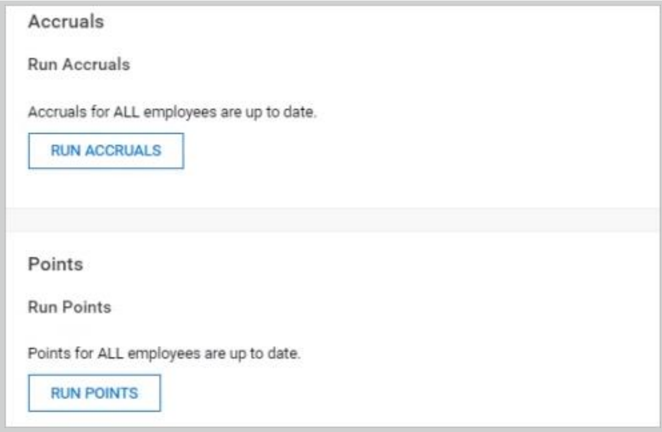

You will be taken to the Unapproved Report where the timesheet action buttons are located when you click the View Timesheet Status for Review link. You can approve timesheets from here.

When you click the View Timesheet Status to Approve link, you will be taken to the Unapproved Report, which contains different columns.

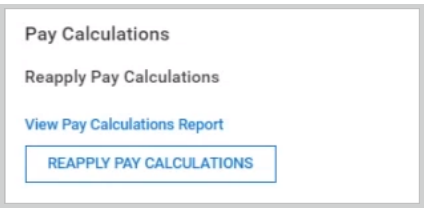



Tip: When navigating through various reports, the system will remember the last report you were on and will take you back to that report when you click on the applicable link. For example, if you were just on the View Pay Prep Records Details report and you clicked the Summary button, then you clicked the back arrow button until you landed on the Time Prep screen, and then you clicked the View Pay Prep Records link, you would be automatically navigated back to the View Pay Prep Records Summary report.

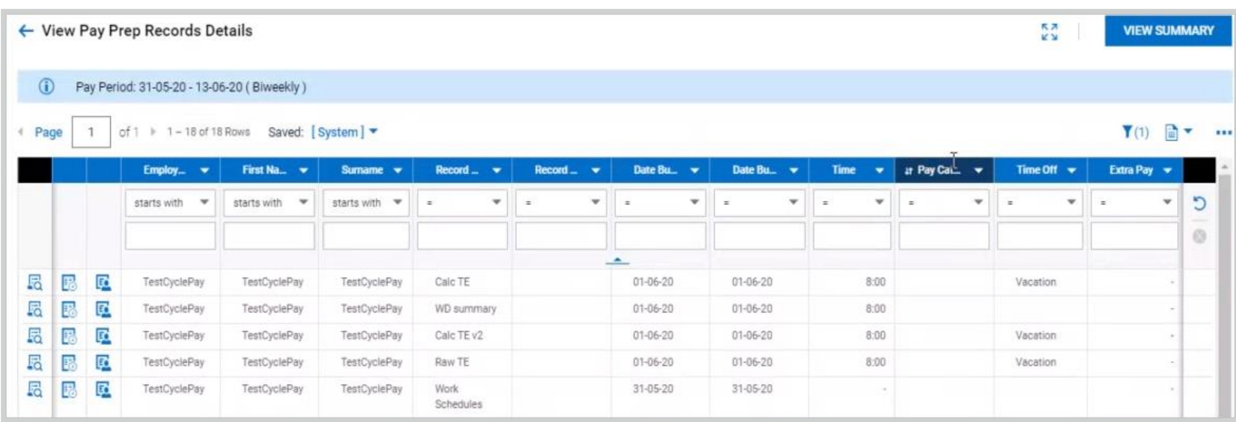
The Accruals section is where you can execute Accruals, and it supports both before and after the lock period. You will receive a message that you are about to run accruals when you click the Run Accruals button. This is also a similar process for running Points.



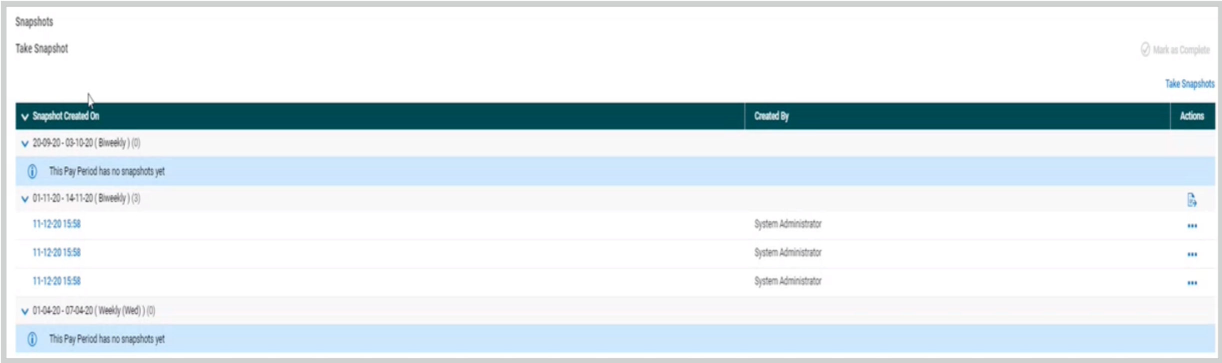

The Reapply Pay Calculations functionality, as well as a link to View Pay Calculations Report, are available in the Pay Calculations section.



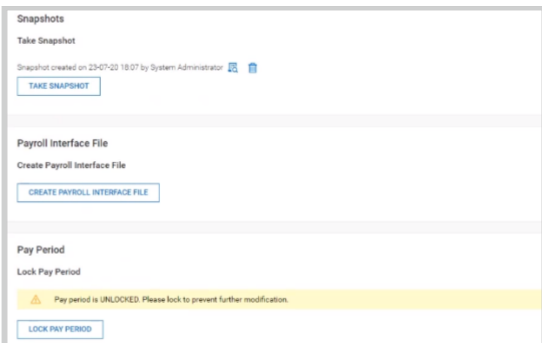

You can also review the results via the View Pay Prep Records link, which will take you to the View Pay Prep Records Details screen for the default. From this screen, navigate to the summary report by clicking the View Summary button.




You can take snapshots from the new Snapshots section. You can also select the arrow to view which snapshots were previously taken.




The last steps contain the Snapshots, Corrections, Payroll Interface File (taking you to the Time Prep Export page), Pay Period, Accruals, Pay Period (locking and unlocking the pay period depending on security permissions), and Points activities. If you are mass processing, a snapshot selector will not be available.




## Accruals 1.0: Default Time Off Balance Cards to Hours Instead of Days

**184837:** Previously, when both hours and days were configured to display in the Accrual Balances, the system displayed the Day balance cards by default in the Time Off Balances cards page.

What's changed: When hours and days are configured, the Hour balance cards will display by default instead of the Day balance cards.

Accruals 2.0: Ability to Subtotal Accrual Balances Report

**186864:** In Accruals 1.0, users can sum up all hours/days values and balance liability in report groups, as well as allow for showing/exporting subtotals only. This is now available for Accruals 2.0.

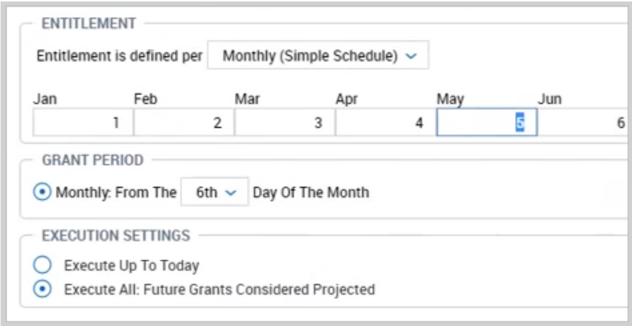
## Accruals 2.0: Custom Accrue: Fixed Grant and Tenure Based Grant Rules

**80104, 213974:** Within the Fixed Grant and Tenure Based Grant Accruals rules, a new option, Custom Accrue Period, is available. This gives you the ability to choose a custom accrue period. A custom accrue period allows you to specify dates and indicate if the employee can accrue this type or not. This option is already available in Accruals 1.0.

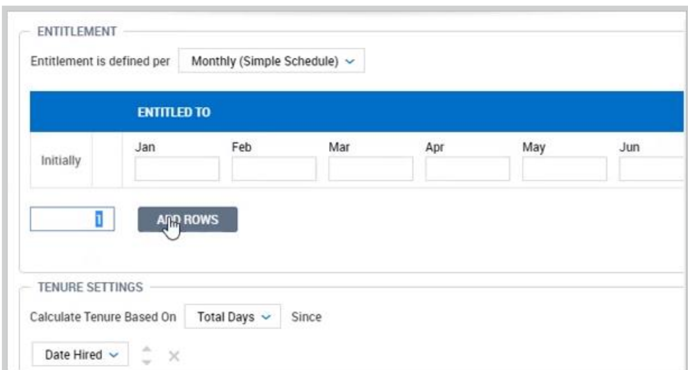
## Accruals 2.0: Monthly (Simple Schedule): Fixed Grant and Tenure Based Grant Rules

**80103, 213965:** Within the Fixed Grant and Tenure Based Grant Accruals rules, from the Entitlement is defined per drop-down, a new option is available, Monthly (Simple Schedule). You can then define the day of the grant period, as well as enter a number of hours an employee will earn for each month during a calendar year. This option is already available in Accruals 1.0.

This is an example from the Fixed Grant rule.

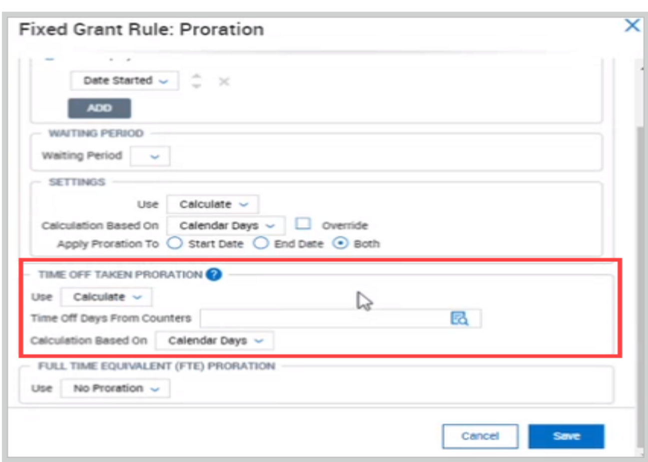



This is an example from the Tenure Based Grant rule. This option for Tenure Based is only available in Accruals 2.0.




## Accruals 2.0: Prorated Calculated Based on Time Offs in Period

**220679, 220682, 220687:** In Days type time off Accruals policies, for Fixed Grant Rule: Proration, Tenured Based Grant: Proration, and RTT Grant Rule, a new section has been added, Time Off Taken Proration, which will take into account any time off taken within the Grant Period and prorate the grant the employee receives for that period.

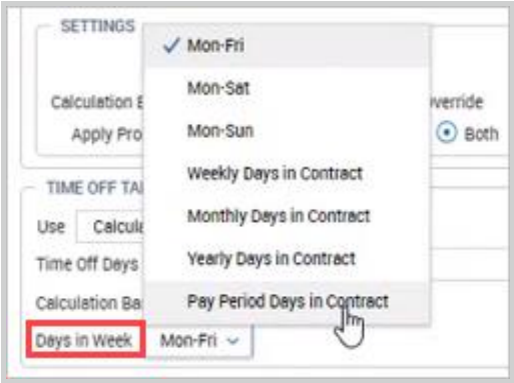


From the Use drop-down, select from the following:

- No Proration: This will take the standard entitlement.
- Calculate: The proration will be calculated.

If Calculate is selected, you will need to choose the counter for the Days type time off, as well as what the calculation is based on, which includes:

- Calendar Days: The amount of days in the calendar for that period.
- Working Days: A Days in Week drop-down will display with days of the week options to choose from.




**Note:** Mon-Fri equates to 5 days; Mon-Sat equates to 6 days; Mon-Sun equates to 7 days.

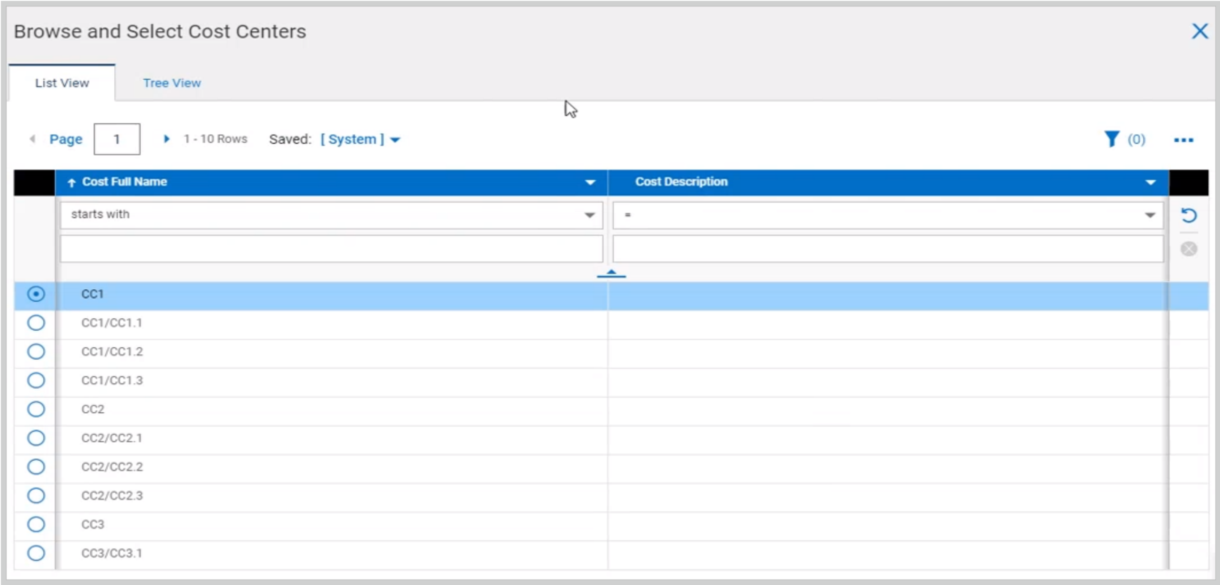
## Cost Centers

### Cost Center Lookup Redesign

**190600, 193188, 209711, 209710, 209949, 209945:** All cost center lookups have been updated. When you click into any single select cost center look up fields, the Browse and Select Cost Centers pop-up will display with the standard report filtering and the full path of the cost centers. Under the List View tab, if more filtering is needed such as for external IDs, payroll codes, etc., you can bring in additional cost center columns, and you can save your view.

**Tip:** If you save a view in the default cost center widget, that view will display across the application with the exception of the Managed Scheduled Cost Centers, Scheduled Cost Centers, and Managed Cost Centers widgets, which give you the option to save cost center views specific to those widgets.

The cost centers are single select, and when you make a selection, the pop-up will close. Multi-selecting cost centers is available for the Managed Scheduled Cost Centers, Scheduled Cost Centers, and Managed Cost Centers widgets.




If you prefer the Tree View, you can select a cost center from the Tree View tab. Select the arrow next to the cost center and any child cost centers associated with the parent will display. The Tree View tab will not be available if there are more than 750 cost centers in any node.


## Leave of Absence

### LOA Rule Now Allows 12-Month Period Measured Forward

OnePoint now accommodates the Department of Labor's rolling 12-month forward leave period. A new option, Use 12 Month Forward Measurement Period, has been added to the Leave of Absence Profile rule, Expire Leave Time Taken. When enabled, the leave taken time balances will be tied to this 12-month forward measurement period. After 12 months from the first date that a specific leave type was taken, the balance will reset.

## Points

### Category Update

On the Points Balances report, users can now add Points without a Category. Previously, the Category field was required.

### Points Rule Did Not Trigger Correctly

Previously, when points were configured using Late/Early Leave and set a list of excused time offs, when the start/stop excused time off entry was used in combination with hours worked, the points rules triggered incorrectly.

Going forward, points will be accrued in Late/Early Start and Late/Early Leave rules with excused time off. Points will not accrue when users enter hours worked in combination with start/stop excused time off in all the views.

## Reports

### Dashboard Framework: Added Pay Period Profile Selector

**218487:** Previously, a filtering option to select a Pay Period profile in the Time Summary report was not available.

What's changed: A filter option is now available in the Time Summary report so that you can select a specific Pay Period profile. The selector will include all Pay Period profiles in your company.

### Split All Time Entries Report Views

**211219:** Previously, the Time Entries reports were only available from Current view > View By in the Approve Time Entries report.

What's changed: The Time Entries reports (All Time Entries, Approve Time Entries, and Time Entry To Do Items Pending Approval) are now available Menu items under Team > Time > Timesheets > Time Entries.

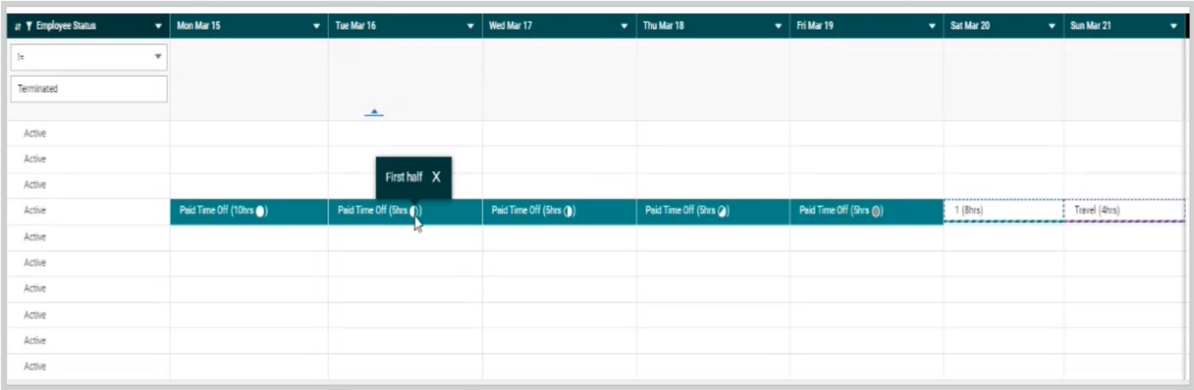
### Split Change Requests Report Views

**210516**: Previously, the Change Requests reports were only available from Current view > View By in the Timesheet Change Requests report.

What's changed: The Change Requests reports (Timesheet Change Requests and Pending Timesheet Change Requests) are now available Menu items under Team > Time > Timesheets > Change Requests.

### Time Off Roster: Added Visual Indicators for Approved and Pending TORs

**199051:** The cells in the Time Off Roster report will now display colors configured in the time off definitions. If a dynamic duration is specified and you have the Time Off To Display filter options enabled, a circle icon will display in the cell, such as a filled in circle to indicate a full day.

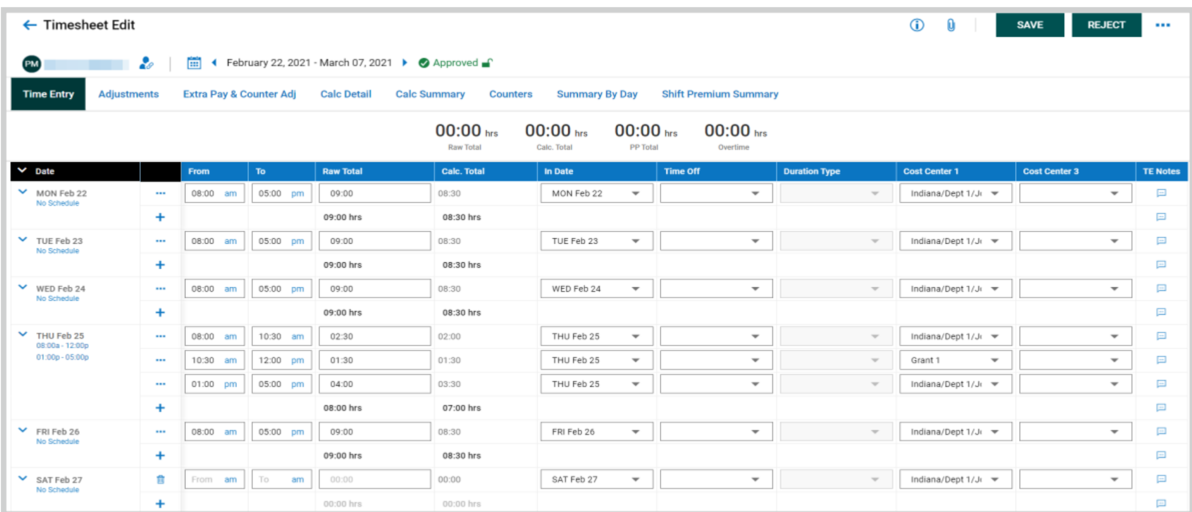



In a future release, when you export the Time Off Roster report, the export will display this updated report with these colors. Currently in this release, this is not supported.

## Timesheet

**Important:** All timesheet users will be switched to the New Timesheet view in R75 (June 2021).

An example view of the New Timesheet as of this current release:




### Column Widths Now Dynamic

Previously, the Timesheet had fixed width columns, which would result in extra white space horizontally.

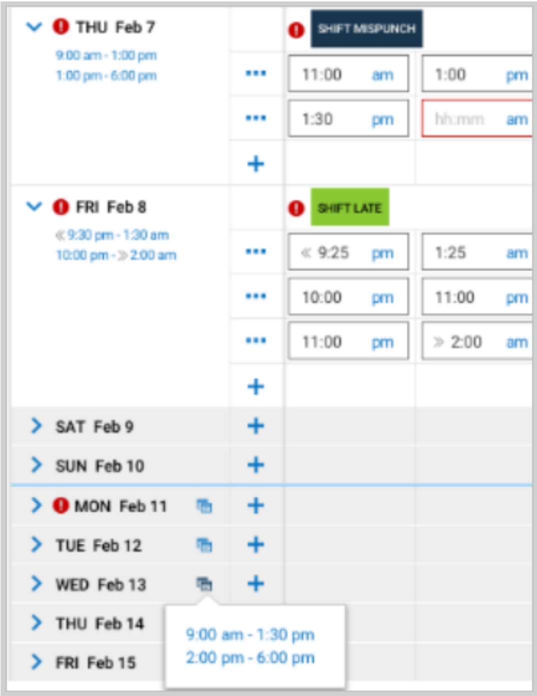
What's changed: The column widths are now dynamic, automatically adjusting to the size of the information it contains. The From and To columns under the Time Entry tab will remain static, while the rest of the columns will size dynamically so that the timesheet table fits in the entire screen.

### Date on Calc Detail Tab is Now a Link

As previously available in the Classic Timesheet, in the New Timesheet for desktop users, the date under the Calc Detail tab is now a link that will navigate you to the Time Entry tab when clicked.

### Display Schedules in Date Column

The Schedules column has been removed, and Schedules will now display in the Dates column underneath the date. The action column is next to the Dates column. The schedules that will display are the raw schedules, not calculated. If you select the schedule, the Schedule/Shift Edit pop-up will display.




### Expand/Collapse Timesheet Days Options

Previously in the timesheet, users did not have the option to have all the days display as expanded rows by default, expand the current day only, or to expand only the rows that contain data, such as punches or bulk hour entries.

What's new: You can now customize your timesheet view with the data that you want to initially see. In the Timesheet Profile, a new drop-down, Expand Timesheet Days, has been added to the Extra Settings widget with the following options to choose from:

- Expand Current Day And Days With Data Only
- Expand Current Day Only
- Expand Days With Data Only
- Expand All Days

### Fixed "Date" and "Action" Columns to the Left and Moved Daily Totals (Start/End)

In the New Timesheet, the Date and Action columns under the Time Entry tab are now fixed at the left of the timesheet and will remain fixed so that you can always see the data in these columns when you scroll. Previously, these columns disappeared when users scrolled to the right. In addition, the Daily Totals were moved from above the days to below the days in order to improve the flow of time information.

### Re-Calculate/Save New Timesheet through Manage Exceptions

Previously, when users made a change to exceptions on the timesheet via the Manage Exceptions pop-up, the timesheet would not re-calculate unless the user saved the timesheet or took another action to re-calculate.

Going forward, when an exception is modified/deleted/or added via the Manage Exceptions pop-up, upon clicking Ok, the timesheet will automatically re-save (re-calculate).

### Renamed My Clock to My Timesheet in Clock Widget

The Clock widget link to a user's timesheet that was previously labeled as My Clock has been renamed to My Timesheet. In addition, in the Security Profile under the Dashboards tab within the Dashboard Widgets widget, the My Clock option has been renamed to My Timesheet.

### Separated Time Off and Cost Centers in Time Off Settings

Previously in the New Timesheet, users did not have the option from Time Off Settings to separate the Time Off and Cost Centers columns, which was previously available in the Classic Timesheet.

What's been added: In the Timesheet Profile for the New Timesheet, an option from Time Off Settings is now available, Separate Time Off and Cost Centers, which will separate these columns if enabled or combine them under one column if disabled.

## Timesheet Change Request

### Added CC to Punch In Option

Previously, if an employee forgot to punch in and was working in a new location or department, the employee could not identify which cost center from Add Punch In Change Request they were working in, which resulted in having to perform a separate action of modifying the cost center.

What's changed: A Cost Center section has been added to Change Request for the type, Add Punch In. This allows employees the option to choose the cost center for where the punch in should go when submitting this type of change request.

### Added Option for Delete Punch

Previously, there was not a timesheet change request option for employees to request deleting a time entry or single punch.

What's been added: A new timesheet change request Change Type option has been added, Delete Time Entry. When selected, the employee will be able to choose one or multiple time entries to delete.

### Added Require Comment

Previously, not all timesheet change request types had the option to require employees to add a comment when submitting a timesheet change request.

What's been added: In the Timesheet Profile, within the Change Requests Employee Can Perform section, Require Comment boxes have been added next to all change request types so that you can choose which timesheet change requests should require a comment from the employee upon submission.

## Time Off

### Modify Time Off: My To-Do Items

Previously, Modify Time Off was not available for non-consolidated time offs for multiple day requests, and users could not modify a Time Off Request from a Time Off Request My To-Do Item.

What's been added: Modify Time Off is now available for non-consolidated multiple day requests, which include multiple days and dynamic duration. In addition, a new Modify button has been added to time off requests within the request's My To-Do Items.

### Separate Time Offs and Cost Centers in Tree View

Previously, when the Separate Cost Centers and Time Offs option was unchecked, time off categories did not reflect in the Tree View. Going forward, time offs will display in the tree view as expected.

### Time Off Utilization Settings Not Applied

Previously, Time Off Utilization settings configured in the Time Off Request profile were ignored when a manager approved time off via the Pending Approval report. The time off utilization used the employee's PTO balance first before using the UTO balance.

This has been fixed, and going forward, when a manager approves time off through the Pending Approval report, the time off utilization will be applied, and the UTO balance will be used.

### Mobile Quick Punch and Change Cost Center

As previously available in the Classic Mobile App, Quick Punch and Change Cost Center options are now available for users to quickly clock in and out or change cost centers from the login screen in the New Mobile App.

To allow for quick punching in and out, navigate to Mobile Quick Punch Preferences (Global Setup > Company Setup) and enable the functionality with the Enabled checkbox. Within the Quick Punch Settings section, the following options are available to enable for punching in/out:

- Allow Simple Punch
- Allow Punch IN
- Allow Punch Out

You can also enable options to allow users to change cost centers. Make sure Allow Mobile Login is enabled and enable Show Change Cost Centers from the Quick Punch Settings section.

From the Timesheet Profile, if Collect Extra Pay with an OUT Punch is enabled this option will display after punching out. If Geo Fencing is used, the mobile quick punch will follow the Geofencing rules configured in the Timesheet Profile. If Attestation is set up, the mobile quick punch will follow the settings configured in the Attestation Profile.

# Payroll

## Important! Quick Payroll Under Construction

In the February 2021 release notes, we notified you that we are making some required UI changes to Quick Payroll, and that the functionality would not be available when the April 2021 release is applied to your server. As of this release (April 2021), Quick Payroll will be unavailable, and its unavailability will likely extend into future releases. When it is ready, we will notify you in the release notes.

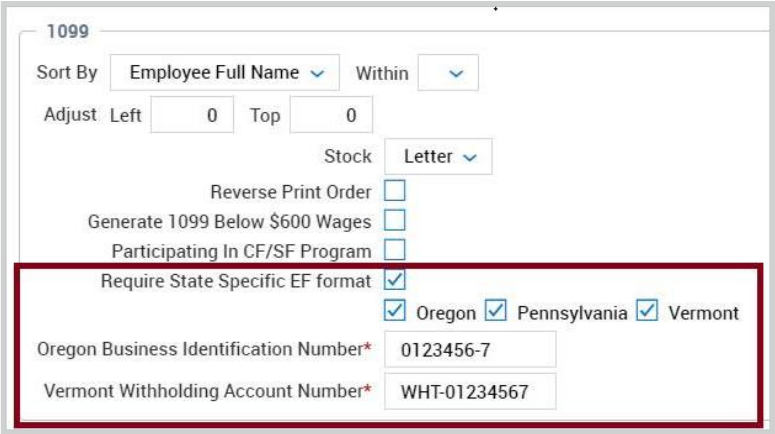
## 1099-NEC data can now be reported in Electronic Forms

On the EF W2/1099 Files page, when users click the Create EF W2/1099 Files button to create a form 1099 for the following states, the system creates one Electronic File with the B record for 1099-MISC and 1099-NEC forms:

- Oregon
- Vermont

Pennsylvania is slightly different from Oregon and Vermont. When users click the Create EF W2/1099 Files button to create a form 1099 for Pennsylvania, the system creates separate Electronic Files: one containing 1099-MISC forms, and one containing 1099-NEC forms.

For all three states, users must enable the state-specific EF formats at Company Settings > Global Setup > Company Setup on the Payroll Tab in the Printed W2/1099 Options widget and the 1099 section.




## CARES Act retention credits are extended into 2021

The system is updated to calculate the CARES Act retention credit into 2021. The calculation is based on the earnings and deductions in a pay statement.

## FFCRA earnings types are extended into 2021

The system is updated to extend into 2021 the Earning Limit for the three FFCRA earnings types, which are as follows:

- FFCRA Family 10 day with 2000 limit
- FFCRA Sick 10 day with 5110 limit
- FFCRA Family Leave 10 week with 10000 limit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## State Forms are updated for 2021

The following updated state-specific forms for 2021 are now available in the system:

- Connecticut: W-4
- Maryland: MW507
- Minnesota: W-4
- New Jersey: W-4
- North Carolina: NC-4, NC-4EZ

# Scheduler

## Employee Profile

### Daily Rules Limit List

Previously, users could create lists for daily schedules, but they were unable to assign a list to a manager so that the manager was able to see only the Daily Rules in their list when creating basic schedules.

What's been added: For TLM and TLM + Scheduler companies, a new widget, Daily Rules, has been added in the Employee Profile so that users can create and assign a limit list for managers. Basic Daily Rules will display in this widget. Managers that are assigned a Daily Rules List will be limited to select only Daily Rules that are part of that list (in any TLM page where a shift can be assigned).

> **Tip:** The Daily Rules Limit List only applies to managers that create shifts using Basic Scheduler (even if TLM and Scheduler are enabled), not for rules marked as Scheduler.

Access to the Schedule Daily Rules Limit List is tied to the Schedule Daily Rule permission. In the manager's Security Profile, under the Global tab within the Object Lists section, enable View/Edit/Add permissions for Schedule Daily Rule.

To view/edit employees' daily rules, in the manager's Security Profile, under the HR tab within the Employee section, enable View/Edit permissions for Daily Rules.

## Schedules

### Added "Add New Shift" Button to Browse and Select Shifts Window

As previously available in the Classic UI, in the Day, Week, and Month views in the New UI, you now have the option to add a new shift by directly clicking on the employee row. When you left-click in the row, a Browse and Select Shift pop-up will display shifts that the employee would be qualified for. Once a shift is chosen, select Add New Shift. The Manage Shift window will display where you can choose the date, adjust the shift time, etc.

This feature allows managers to be able to quickly assign a new shift to an employee from any of the schedule views.

### Added Swap Selected Shift Option to Schedule Screens

As previously available in the Classic UI, in the Day, Week, and Month views in the New UI, you now have the option to swap selected shifts when two shifts are selected. When you select two shifts, the pop-up will display a Swap Shifts option. This is helpful for managers who want to quickly switch shifts between two selected employees. The manager will be notified of any violations after the shift swap.

### Display Assigned Time Off Colors in Schedule Views

Previously, all time offs in the schedule displayed as a green color.

What's changed: You can now assign colors to time offs, which will make the time offs easily recognizable in any of the schedule views and Weekly Schedule. Under Company Settings > Global Setup > Time Offs, choose a color for each time off from the Time Off Color field.

### Scheduler Fairness Additional Conditions Updated

From New Scheduling Fairness Rule, if Changing Start/End Time is enabled and the Compliance Payout is a time-based counter, a new section, Additional Conditions, will display. From this section, you can enter a number of hours to add to the shift or remove from the shift. The formula is: Value * Total Canceled Hours.

> **Example:** If the employee is required to receive half of their canceled hours, you would enter 0.50. As another example, if an employee is working an 8-hour shift and you reduce the shift to a 6-hour shift, the employee would still receive X number of hours that were reduced from their shift.

### Scheduler Fairness Trigger for Posted Schedule

Previously, Schedule Fairness triggered for changes made to posted schedules, but it did not trigger the workflow for adding extra pay when posting a schedule that was in violation of the Scheduling Fairness rule.

What's changed: If there are any Scheduling Fairness rules where an employee has to approve a change when a shift is added to their schedule that includes extra pay, the system will look at the shift date on the schedule, and if pay needs to be added for the shift depending on the Fairness Request Conditions, the employee will see the to-do item, as well as the extra pay.

If Schedule Start Date is selected from the Days To drop-down in the Fairness Request Conditions section and the shift is not posted within the entered number of days starting from the first day of the schedule, then the rule will be triggered upon posting, and the employee will be able to approve any shift on the schedule.

If Shift Date is selected, the system will look at the shift date on the schedule and will only trigger the rules that are in violation within that date.

### Schedule Week View PDF Print Version

You can now download a PDF print version of the View By Week schedule. From this view, click the three-dot ellipsis button at the top of the schedule, and select Download PDF. This print view will display the shift color, schedule name and dates, shift skill, time, and scheduled cost center.


## Feature Retirements

The following table documents functionality that has been retired or is planned to be retired:

| Feature | Pathway | Functionality No Longer Available | Reason | Planned Retirement Date |
|---|---|---|---|---|
| Schedule Table View | Team > Schedule > Schedules | You will not be able to input shift times only for schedules, as well as copy and paste existing schedule time ranges from employee to employee. In addition, the PDF Print option will not be available. | This view is not user-friendly. From any of the views, Print Preview will still be available, which includes the same information for printing with additional options as to which shifts should be included in the printout. | April 2021 |
| Schedule Overview By Date Range | Team > Schedule > Schedule Overview | You will not be able to bring multiple schedules into one view. | This view is not user-friendly. You will still be able to bring in multiple schedules via the Summary By Employee report, but not in a schedule-like view. | April 2021 |