Software Release Notes

OnePoint Human Capital Management

Release 75 June, 2021

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Supported Operating Systems and Browsers

The following tables show the operating systems and browsers currently supported.

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

Browser	Version
Microsoft Edge	latest
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

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

Human Resources

Hot HR Features in this Release

Social Security Number Verification Service (SSNVS) is Back!

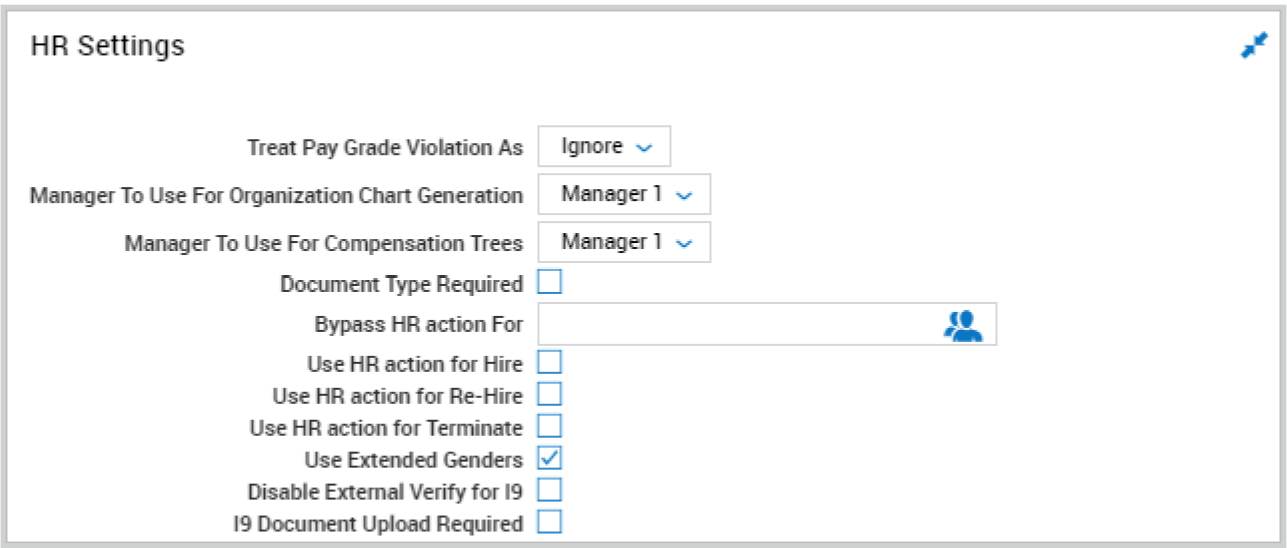
We are happy to announce the return of the **Social Security # Verification** button and functionality for those companies who have the SSNVS marketplace product enabled. The button can be found in the following areas of the product:

- Employee Information: Manual Hire Page
- I9 Form: Team > HR > Forms > Government Forms > I9s

Gender Inclusion

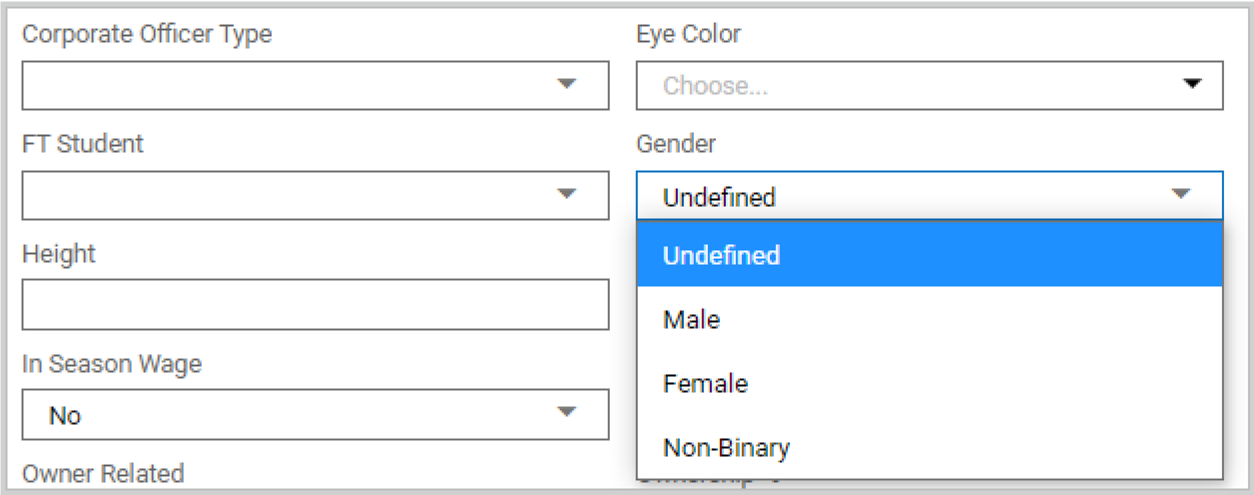
Non-Binary Gender Option Added to System

To provide more options for gender inclusion, the system will now provide a new Non-Binary/X option. The **Use Extended Genders** setting is available in Company Setup, located in the **HR Settings** widget under **Company Settings > Global Setup > Company** Setup.



> **Note:** This setting will be checked by default, as 20+ states have regulations recognizing gender Non-binary/X .

When the setting is checked, a **Non-Binary** option will display in the list of options under the **Gender** drop-down in the **Account Demographics** widget of employee profiles.



The gender code for Non-Binary will be **X**. Current codes: Undefined = U, Male = M, and Female = F. This code will display in the **Gender** column of reports where the column is available and added. The new gender option will also be available for PDFs.

Once this option has been selected for at least one employee, the option in Company Setup cannot be turned off (unchecked). An error message will display informing the user why the option cannot be turned off. The setting will be checked by default for all companies and all EINs.

Opting Out

For companies who choose not use this option, or may have religious exemptions, or are simply not required to provide this option per the laws of their state, they may uncheck this setting. Opting out will hide the option from selection and reporting. The Undefined option will still be available.

HR Actions

HR Actions will recognize the **X/Non-Binary** gender code so users will not have to update employees manually as they are hired or processed. Assuming the **Use Extended Genders** setting is enabled in Company Setup, the following can be expected.

HR Action Sub Type = Hire, Re-Hire, or Regular: The Gender drop-down will include the Non-Binary option.

> **Note:** The Manual Hire Process will include the Non-Binary option in the Gender drop-down field.

Employees Import

The Employees Import template is updated for the use of the X gender code. This affects the XLS, XLSX, and XML options. Assuming the **Use Extended Genders** setting is enabled in Company Setup, the following can be expected. If this field has not been enabled, using Gender X will result in processing the import and then present users with a warning that Gender X is invalid for the employee(s).

- The Instructions tab is updated in the Description of the Gender row. Valid values include: M, F, U, or X.
- The Template tab will validate the values and recognize X as a valid option.

Company Settings Import

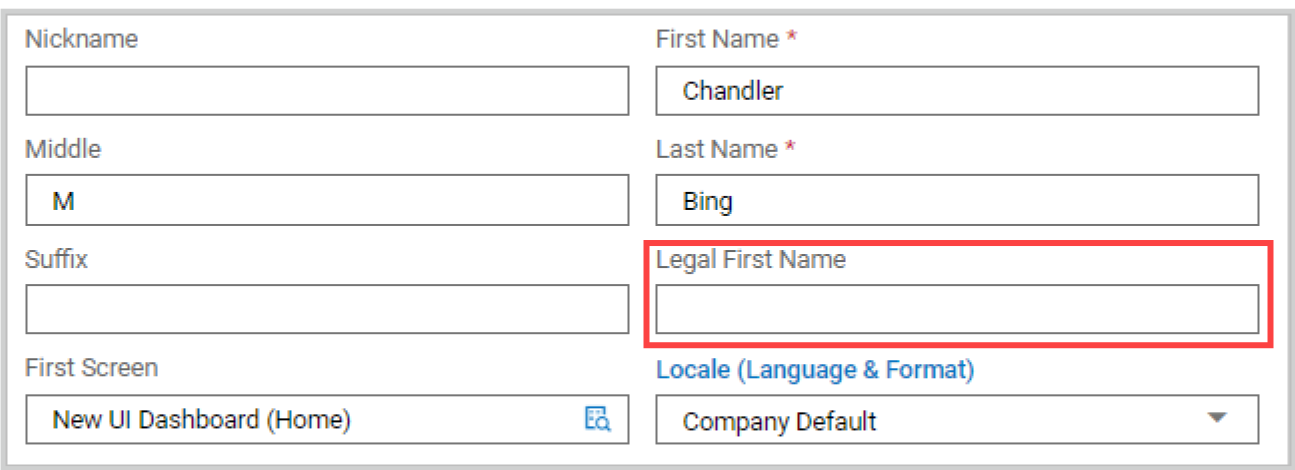
The Company Settings Import template is updated with field name **Use Extended Genders** which allows you to determine via import if the non-binary gender option is available. This field has been added to the HR Settings section of the Instruction tab of the template. The column is not a default column in the Template tab and must be added. Y and N are valid values to determine if the setting will be enabled or not. If the value is not specified or is invalid, the system does not change the value in the company. If at least one employee in the company is listed as Gender X/Non-Binary and the value in the column is N, the value is not processed and an error displays.

Legal First Name Option Added to System

> **Important:** In this release, the **Legal First Name** field will not be available if the Payroll sub-system is enabled. This field is coming to Payroll companies in a future release.

In addition to offering the Non-Binary option for gender identity, a new **Legal First Name** field has been added to employee profiles. Employees' preferred name can be added to the **First Name** field and their legal first name can be added to the new field, as there are still cases and places in the system where their legal first name must be used. This will allow employees to be addressed by their preferred name when the legal name is not required.

The field is located in the **Account Information** widget between the Suffix and First Screen fields.



Security: A new checkbox for Legal First Name is available in the View/Edit (Custom) permission for the Account/Personal Information setting in security profiles, located in the Employee section of the HR tab. Users will select the Permissions button to open a pop-up. An Info icon displays a message that Legal

First Name will be displayed on legal documents such as pay statements, withholding forms, year-end tax forms. View and Edit options are available on this pop-up.

- This permission is also available in the **Employee** section under the **ESS** tab for employees who are allowed to view and/or edit their employee profiles.

HR Actions: HR Actions can contain the Legal First Name field so users will not have to update employees manually as they are hired or processed. Assuming the Legal First Name permission is enabled (View or View/Edit) in the security profiles, the following can be expected.

HR Action Sub Type = Hire, Re-Hire, or Regular: The **Legal First Name** field will display and can be used.

Note: For the Legal First Name field to be available in the Manual Hire process, the security permission must also be enabled.

Custom Forms: When selecting Type: Employee in a custom form page, Legal First Name will be available as an option from the drop-down. For this to be available, users must have security permission to the Legal First Name field. Users without this permission will not see it in the drop-down, and users without permission will not see the field in the form.

Reports: The Legal First Name column can be added as a column to the Employee Information report and other employee related reports. The column is not displayed by default and must be added.

I9 Forms: If a Legal First Name has been specified, the system will use this name over the preferred name listed in the First Name field. This will also apply when using E-Verify.

W4 Withholding Forms: For companies without the Payroll sub-system enabled, if a Legal First Name has been specified, the system will use this name over the preferred name listed in the First Name field. Existing forms will not be updated but can be manually edited. This impacts all withholding forms, both federal and state. Security Permissions for Legal First Name do not affect visibility of Legal First Name in Withholding Forms.

New Hire Reporting: If using Legal First Name along with First Name in employee records, the Legal First Name will be used in system Data Exports (Company Settings >System Data Export > Data Exports). This will be available for the New Hire Reporting exports for all states, including the Generic Version, the Faxable Version, and SSNVS.

Employees Import: The Legal First Name field has been added to the XLS and XLSX versions of the Employees import template. The field is explained in the Basic Employee Information section of the Instructions tab. On the Template tab, the field is located between the First Name and Last Name fields.

Employee Profiles: The Legal First Name field, if used, will be included in the Employee Profile PDF.

Other areas affected by Legal First Name field:

- Group Permissions: new field included
- GDPR requirement met

- Language localization supported
- Available in mobile app

NOT available for the Applicant Profile page: only available for hired employees

Audit Reports support new field: Account Info report (located at My Reports > System Reports > Audit Trail), and Master Data Changes report (located at System Reports > Audit Trail)

Search: Users with permission to view and use Legal First Name fields will be able to use Search to locate employees by their legal first name. Users without this permission will not be presented the results.

🔥 Job Applications PDF Download

Recruiters and managers can now view and download job applications in PDF, including questions/answers and applicant signatures. This option is located under **Team > Recruitment > Candidates > Job Applications** in the **Quick Actions** menu, under the **More Actions** drop-down. Applicants will also have the ability to download their complete job application in its entirety, including their job related questions and signature.

We have added to the system a downloadable PDF of the Job Application Summary that includes the header from the configuration, job title for the application, opening/intro verbiage provided by your company, all fields in the My Applicant Profile, all questions and answers completed in the job questionnaire (if applicable), the consent/acknowledgment verbiage provided by your company, and the signature with date stamp (if applicable). This is a point-in-time PDF.

We have designed the Job Application Summary to behave slightly different from the Applicant Summary. Here is why:

- Applicant Summary: When electronic signature is enabled, the applicant signs once and is never presented the ability to sign again, even if they make changes to their profile information.
- Job Application Summary: When electronic signature is enabled, the applicant always has the ability to sign for every application. The Job Application Summary is a snapshot in time at the time of signature. So when you look at the Job Application, the signature is for the information contained and can never be changed after the signature.
- If signature verbiage from the Applicant Summary tab should be the same in the Job Application Summary PDF, make sure to copy the verbiage to both Summary tabs

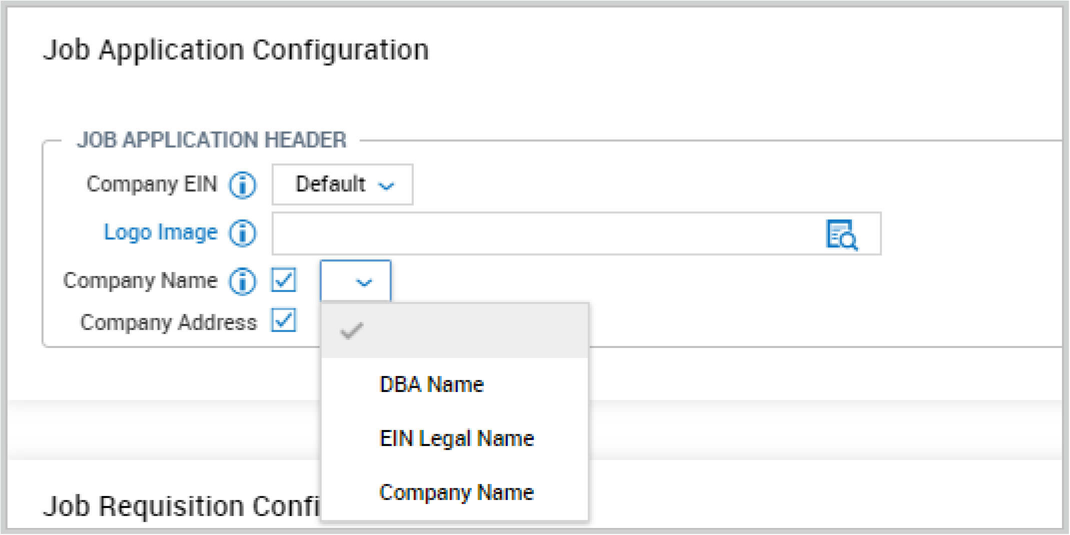
Job Applications: Choosing Company Name in PDF

A drop-down field has been added next to the **Company Name** field in the **Job Application Configuration** widget within the **Configuration** page under Company Settings > HR Setup > Applicant Tracking/Recruitment > Configuration. The options here include DBA Name, EIN Legal Name, and Company Name. These selections will display on the Job Application Downloaded PDF.

The company names are pulled from the **Company Address** widget in the **Company Setup** page, located under Company Settings > Global Setup > Company Setup. An Info icon tells you how the system will cycle through the names if left blank (unchecked.)

- If blank: the Company Name shown on Job Application will be DBA
- If DBA blank: system uses EIN Legal Name

- If both DBA and EIN Legal Name blank: system Company Name is used



Offer Letter Workflows

In the December 2020 system release, Offer Letters functionality was released. In this release, we are adding Offer Letter workflows. The workflow will be available as an editable default workflow or can be manually built. The workflow contains many of the standard steps, actions, and filters just as other workflows do. Workflows are located under Settings > Global Setup > Workflows.

- Where it is used: The workflow is placed in the Offer Letter Workflow field in the Applicant Tracking/Recruitment Configuration page, located under Settings > HR Setup > Applicant Tracking/Recruitment > Configuration. The field name is hyperlinked and when selected will open workflow maintenance.
- Why it is used: The workflow is meant to give the user the ability to configure in such a way that multiple managers can take action (approve/modify/reject) and finalize accordingly.
- How it triggers: As soon as a user fills out the details in the Offer Letters page and submits, the offer letter workflow is triggered provided the user has selected a workflow in the Offer Letter Workflow field on the recruitment configuration page. One the workflow is initiated, editing of the offer letter will not be allowed.
- Report columns: In the Offer Letters report page, you can add two new columns, Workflow Status and View Workflow. The status of workflow will change in the Workflow Status column as the workflow goes through its process.
- Approval/Rejection behavior: Once the workflow is approved and completed, the offer status will change to Offer Generated and then a PDF is generated. If not approved and completed, the offer status will be set to Rejected and the offer letter page will be read-only without any action buttons.
- Deleting an active workflow: When there are offer letters with a workflow in progress and the workflow is removed from the configuration page, the following can be expected:
- All the offer letters will be generated regardless of the state they are in the workflow.

- All the related To-Do's will no longer be displayed.
- The offer letter report will remove the workflow & workflow status for the associated offer letter when they are in progress. For all the offer letters for which workflow is completed, the workflow & status will still exist and will not be affected.
- If the workflow is modified or deleted or the applicant hired, we will capture a point-in-time snapshot to be displayed in the report for all completed offer letter workflows (either approved or rejected).
- Managed Cost Center (MCC) Permissions: MCC managers will have the ability to select a cost center manager within the Approve/Reject step of the Offer Letter Workflow if they have the following permissions set within their Managed Cost Centers widget in their employee account.
- Within the **Managed Cost Centers** widget, select the **Edit Cost Center Permissions** action for the desired cost center. Check **Approve HR Action Workflow** and set the **Approve Level** and save.

🔥 Preboarding/Onboarding

In this release, we are pleased to introduce Preboarding and Onboarding. Onboarding can be a critical part of the new employee experience. Many studies have shown that a properly onboarded employee is far less likely to leave their new employer within the first year of being hired.

The new Preboarding Portal and Onboarding Dashboard tab can be utilized to increase engagement and promote company culture for new hires from the time their offer letter is signed through their first year of employment and beyond.

The preboarding period, in this context, is defined as the time between the new employee signing their offer letter and starting their first day of work. The preboarding portal allows you to maintain a level of engagement by allowing a new employee to access information about your company culture and work environment as well as the opportunity to start their new employee paperwork (I-9, withholding forms, etc.)

In order to utilize the functionality, the new employee needs to be hired into the system as an employee and assigned an onboarding profile. At that point, they can be provided with a link and login credentials to the preboarding portal.

🔥 Performance Goals: Cascading and Aligning Public/Private Goals

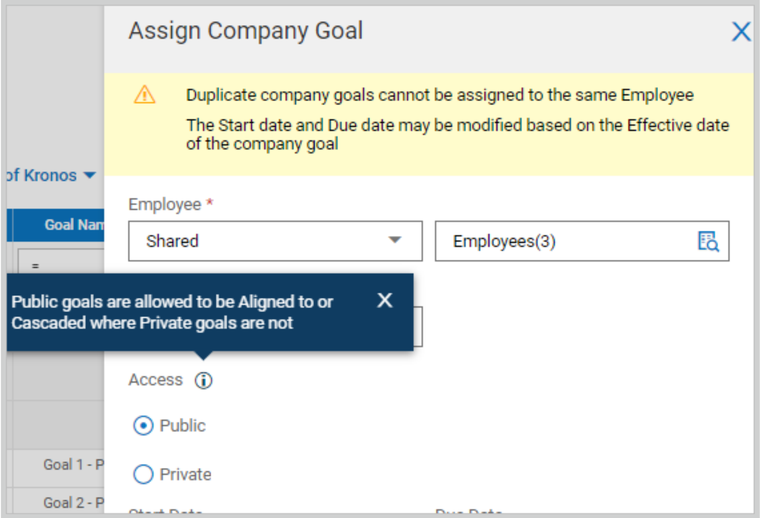
A new option to set goals as **Public** or **Private** is now available. Public goals can be cascaded and aligned to other employees while private goals cannot. This option is available for managers and for employees who are allowed to edit their own goals.

Cascade and Align Goals

When choosing the edit option for a goal, option buttons for **Cascade Goal** and **View Goal Tree** are available. Using the **Cascade Goal** button opens a **Browse and Select Employees** page where you can select one or more employees who should also receive the goal.

While assigning or editing a company goal, you can designate the goal as public or private. An Info icon contains a tooltip reminding users that only public goals can be aligned and cascaded. It will default to Private on all existing goals to ensure backwards compatibility, but this field can be edited.

- Cascade Goal uses the concept of Copy but also links the associated goals together so they can be seen as impacting each other. Cascading can only happen if you have subordinate employees.
- Align is the same as cascade except it is associated up to a manager's goal. Aligning is based on the 6 Manager slots.
- The view is available for both managers and employees with security permission to access their own performance reviews.



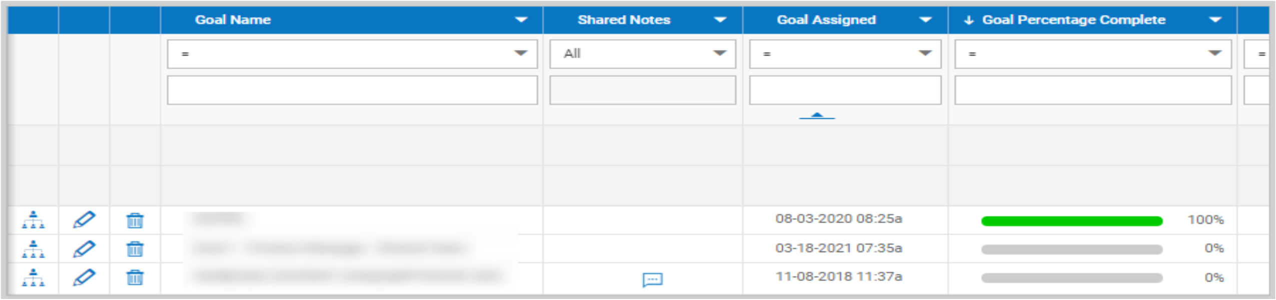
Goal Tree View

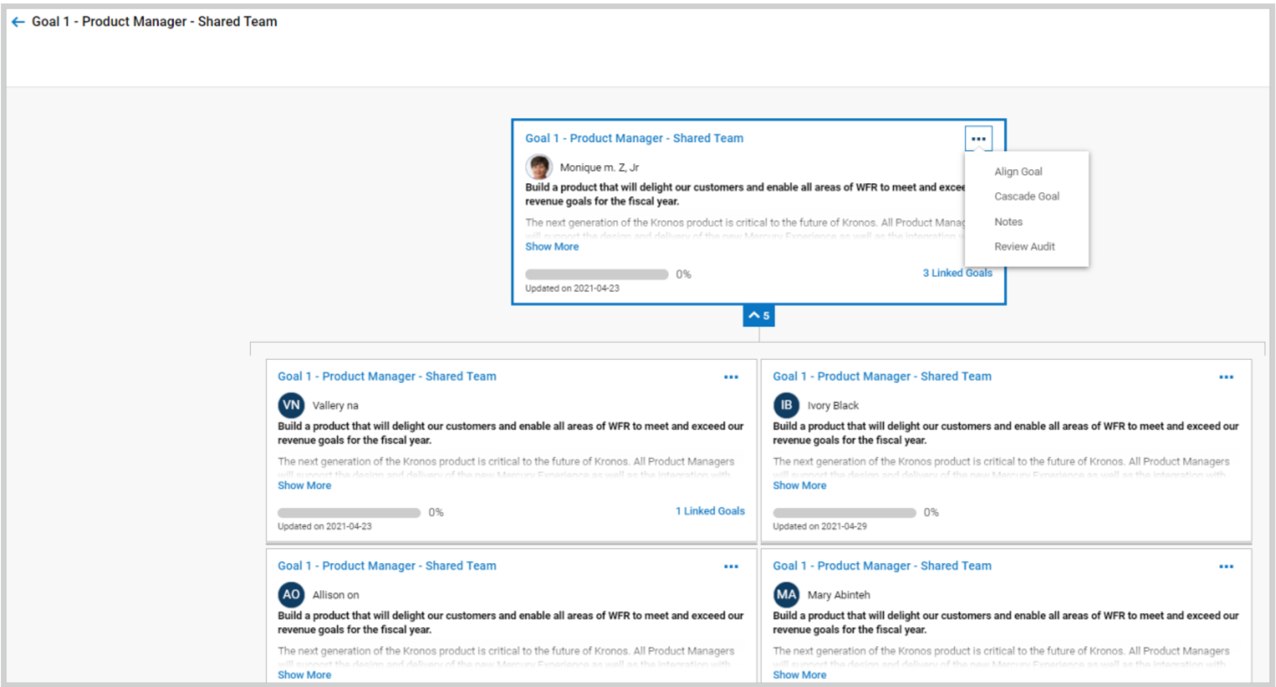
A **View Goal Tree** icon/button is available to be added to the Performance Development report page. When selected, a graphical view of the goals will display showing cascaded and aligned goals and how they impact each other. Within the tree view, a percentage complete indicator will display for each goal and each employee for whom a goal has been assigned.

For the goals, manager options are available within the tree view to:

- Align Goal: A list of the manager's direct reports will display. Clicking/selecting an employee from the list will align the goal to that employee.
- Cascade Goal: A Browse/Select Employee pop-up will allow managers to select employees for the cascading of the goal.
- Notes: Jumps to the Notes widgets of the goal.
- Review Audit: Jumps to the Audit widget of the goal.

For employees in the tree who have linked goals, the option of **Remove Linked Goals** is available. A warning will display to the user before proceeding. Removing linked goals remove the link between those two employees.


Goal Name
Shared Notes
Goal Assigned
Goal Percentage Complete
All
08-03-2020 08:25a
100%
03-18-2021 07:35a
0%
11-08-2018 11:37a
0%


Goal 1 - Product Manager - Shared Team
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Monique m. Z, Jr
Build a product that will delight our customers and enable all areas of WFR to meet and excee
revenue goals for the fiscal year.
The next generation of the Kronos product is critical to the future of Kronos. All Product Manag
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3 Linked Goals
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Align Goal
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Goal 1 - Product Manager - Shared Team
Ivory Black
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Updated on 2021-04-29
Goal 1 - Product Manager - Shared Team
Allison on
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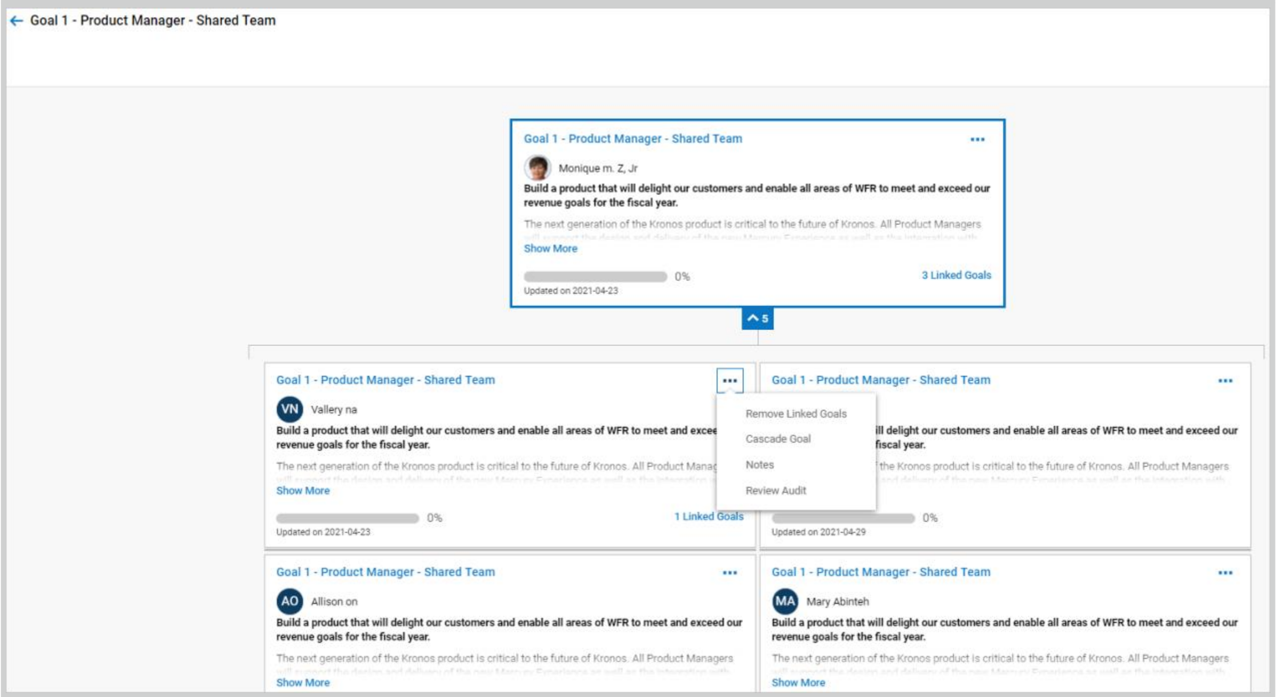
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3 Linked Goals
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Remove Linked Goals
Cascade Goal
Notes
Review Audit
Goal 1 - Product Manager - Shared Team
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Updated on 2021-04-29
Goal 1 - Product Manager - Shared Team
Allison on
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Show More

Color Coded Goal Percentage

Additionally, the color-coded Goal Percentage Complete column is back! This column is available in the Performance Development report page under Team > Talent > Performance > Performance Development and also for employees under My Info > My Career > Performance > My Goals.

Copying Goals

Historically, the creation of a goal has been accomplished via the performance review or through manual assignment.

What's New: In this release, managers will be able to open a Personal, Company, or Shared goal and select **Copy**. This will make the goal available to be added to other employees. The copy will not carry over the Status, Percentage complete, Audit History, or any Private Notes from the original goal upon copy.

Goals Created in Performance Review Available in Performance Development

Previously, goals added only to a performance review did not become available in Performance Development. This one-sided creation of the goal made it difficult for managers to work through the goal during the review period, thus making it so the goal was essentially used at the end of the review period.

What's New: All goals, including those added from a performance review will flow down to the Performance Development screen. This allows managers and the employees to work those goals throughout the year or review period and still review them with ease at the end of the cycle. Ensure goals are set with the **Add To Performance Development** checkbox checked, otherwise it will not flow down to the employees.

HR Enhancements

Base Compensation

Menu Path for Base Compensation Maintenance

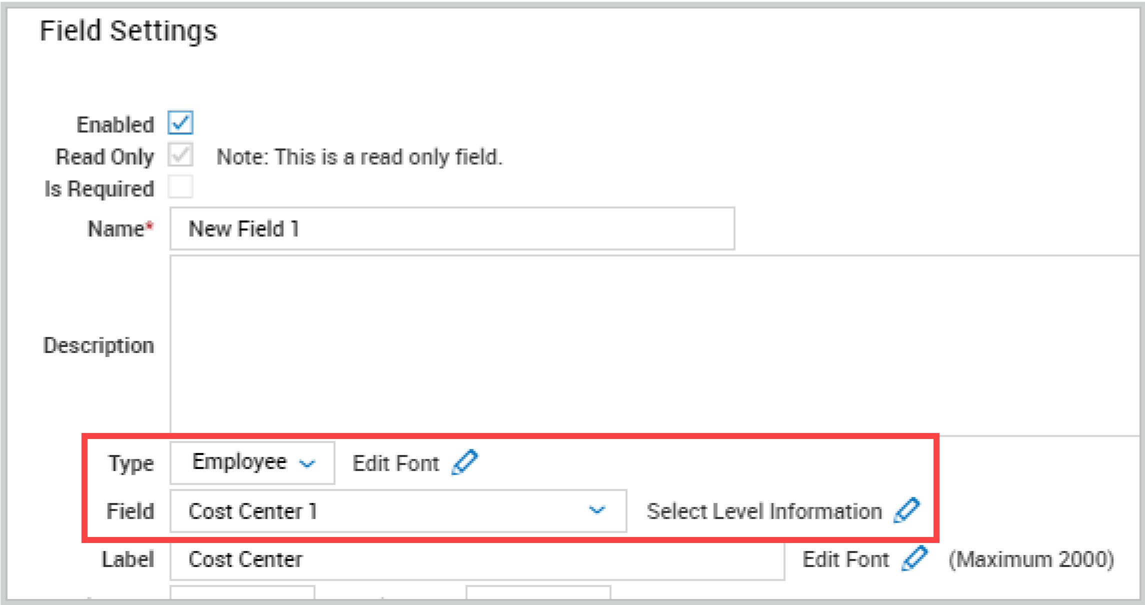
The menu path to access Base Compensation Change Reason Codes has been changed to **Company Settings > Global Setup > Global List Definitions > Base Compensation Change Reason Codes**. This change was made to allow Payroll-only companies to access and customize their Base Compensation Change Reason Codes. The Base Compensation required checkbox in the Account Policies widget of Company Setup will now be hyperlinked for both HR and Payroll only companies. The hyperlink will take you to the menu option mentioned above.

Custom Forms

Select Level Information Added for Custom Form Field Settings

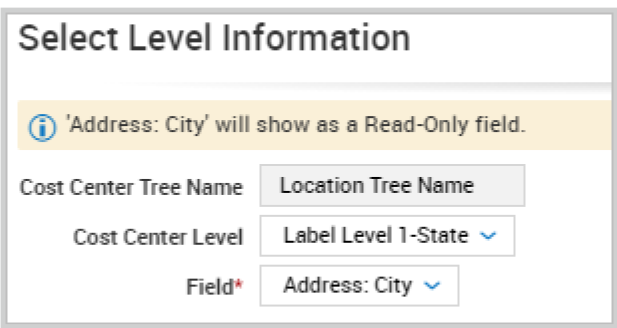
When creating a Custom Form, such as for an employment contract, users can select cost center(s) which will populate the default cost center from the employee record but could not pull additional cost center level information that could provide more detail needed for managers and others.

What's New: We have added **Select Level Information** to the Cost Center Field in custom forms where the user can select the cost center level and field (Name, Abbreviation, Description, Address fields) from the cost center to populate as a read-only field on the custom form.



- From the Field Settings in a Custom Form configuration page, select Type: Employee
- Select Cost Center 1-9

The **Select Level Information** option will become available. Select the edit icon.



The **Cost Center Tree Name** is grayed out. You can choose the **Cost Center Level** and **Field**. The options in these drop-downs will be validated according to how the cost center is set up and which fields in the cost center are enabled, labeled, etc. The system validates against what is set up in the cost center(s).

This only affects Employee custom forms and is not available for Applicant custom forms since applicants do not have assigned cost centers. The additional cost center information will display as read-only, preventing users from editing the cost center information from the custom form.

Points Details Field Available for TLM Only Companies

In the February 2021 system release, we added a **Points Details** field in Custom Forms for **Type = Employee**. In that release, this field could only be used by TLM companies who also had the HR sub-system enabled.

What's New: In this release, we have added the **Points Details** field for TLM only companies. This is configured under **Team > Time > Points > Custom Forms**. Select **Type = Employee** and the **Field** drop-down will display only the **Points Details** option.

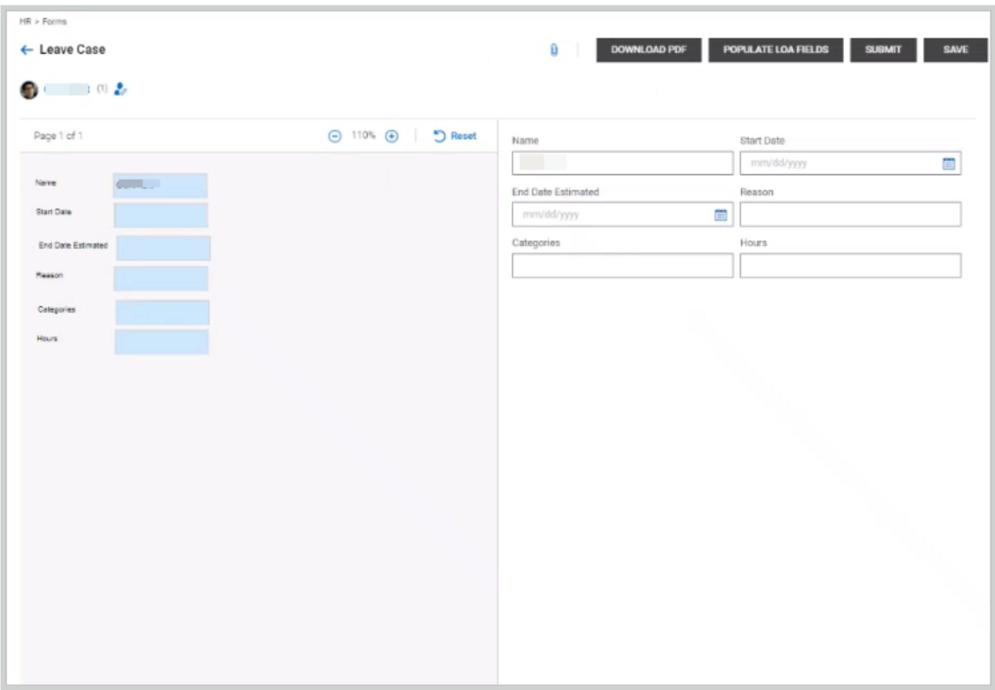
The Points Details field is still available in HR only companies.

Custom Forms Available for LOA Companies

Users can now set up Leave of Absence custom forms in companies, providing the **Leave of Absence** setting is checked in the **Available Functionality** widget of the company (Admin level). The form is available only for employees and is not available if the **Is Applicant** checkbox is checked.

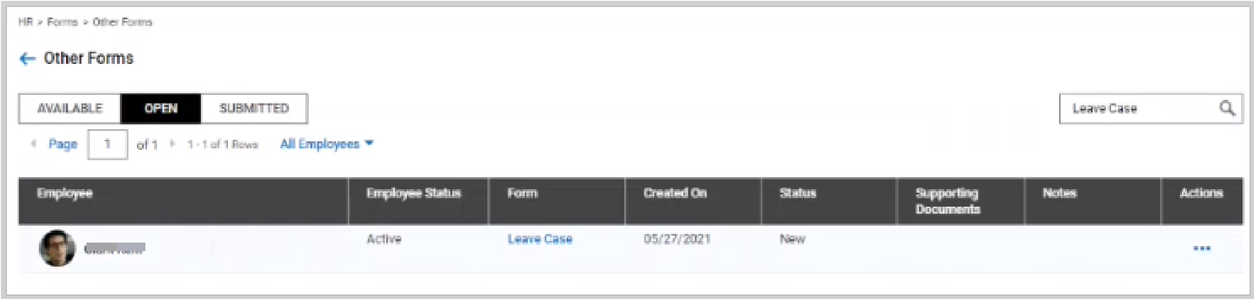
When creating or editing a form, a new field from the **Fields** widget. In the **Field Settings** widget, a new option, **LOA Case**, can be chosen from the **Type** drop-down. You can then configure more information about the LOA case, such as the number of hours, start and estimated end dates, and reason.

Once you are finished setting up the custom form, it can then be assigned under **Team > HR > Forms > Other Forms** from the **Available** tab by selecting **Assign** next to the applicable leave case. On the next screen, select the **Populate LOA Fields** button. A **Populate LOA Fields from LOA Case** pop-up window will display, which will show all the employee's leave cases. Select the radio button next to the applicable case, and the **Leave Case** screen fields will populate with the data. If ready, you can then select the **Submit** button.



You can download a print version of the populated leave case by selecting the **Download PDF** button.

From the **Open** tab of the **Other Forms** page, select the hyperlinked form name in the **Form** column to view the open case. From there, you can submit the form if not done previously. You can view submitted forms on the **Submitted** tab. In the **Actions** column, you can edit, download a PDF of the form, upload a document, assign another employee, view the history, delete, and view the detailed record.



Documents

Benefit Plan Documents During EIN Transfer

When performing an EIN transfer for an employee who has Benefit documents on file in their current EIN, such as EOI, those documents will be copied/moved over to the new EIN without creating new additional documents in the new EIN. This will prevent your company's document storage from becoming overinflated.

HR Actions

Clone Option Added to HR Actions Configuration

You will now be able to clone HR Actions on the configuration page, located under Settings > HR Setup > HR Actions. A new Clone button column is available to be added to the report page. This will not be on the page by default and must be added. It will be available in each row as you create HR Actions. Cloning enables you to copy an existing HR Action and then rename and edit it.

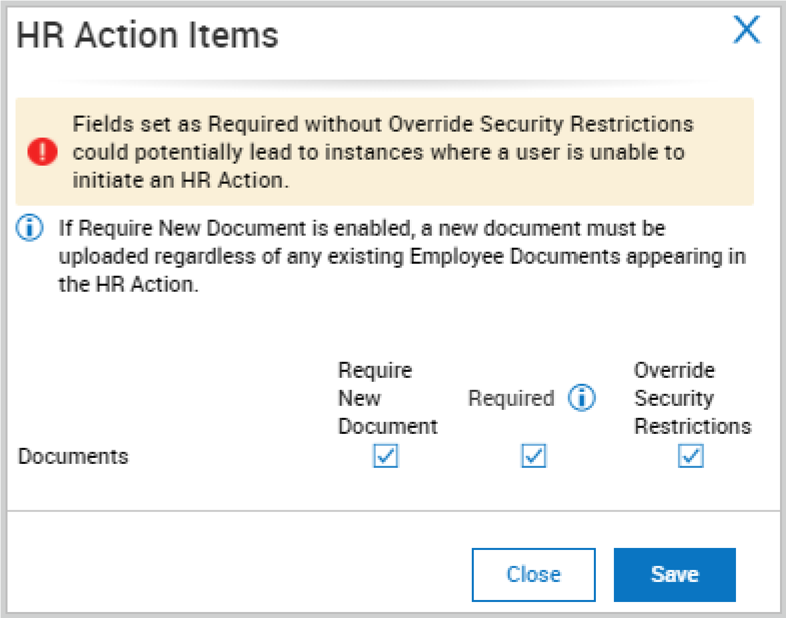
'Require New Document' Setting Added to Documents HR Action Item

When the **Documents** action item is included to an HR Action and marked as Required, the user is required to upload a document and cannot proceed until this condition is satisfied. However, if there were already document(s) uploaded/saved prior on the employee record, the system saw the previously existing documents, which satisfied the validation requirements and did not require the user to upload any new documents. Therefore, the uploading of the newly required document could be bypassed.

What's New: We have added a **Require New Document** option to the **Documents** HR Action Item which will require a new document to be uploaded as part of that HR Action. When checked, even if documents already exist for the employee, they must upload a new document and the system will validate the field as required and not let the employee proceed until the document is uploaded.

Info icons have been added to the **Documents** HR Action item to inform users how the required checkboxes work.

OnePoint Human Capital Management
866.938.5835 | www.ONEHCM.com



Incidents

More Required Fields Added

In Incident Types (Settings > HR Setup > Incidents > Incident Type) we have increased the ability to mark certain fields as required.

- Under **Incident Info Required Fields** section:
- Violation (if enabled in Settings widget on same page)
- Workers Claim (if enabled in Settings widget on same page)
- Employee Signed (if Signatures is enabled in Settings widget on same page and Incident Types workflow is not enabled in Workflow Polices widget of Company Setup, as the workflow would handle these functions via the Sign steps)
- Reviewer (if Signatures is enabled in Settings widget on same page and Incident Types workflow is not enabled in Workflow Polices widget of Company Setup, as the workflow would handle these functions via the Sign steps)
- Review Signed (if Signatures is enabled in Settings widget on same page and Incident Types workflow is not enabled in Workflow Polices widget of Company Setup, as the workflow would handle these functions via the Sign steps)

Jobs

Job Attributes Limit Increased to 25 Items

The limit for Job attributes created in the Jobs report page have been expanded from 10 to 25. This page is located under Company Settings > HR Setup > Jobs. On this page, attributes are added via the Define Attributes button. These attributes will display and can possibly be edited in a defined Job within the Job Attributes widget. The following areas will allow for up to 25 job attributes:

- The Jobs report page
- The Jobs Import template

- The Job Info History Report: job attributes display in the Field column with Old/New Value.
- The Job Attributes widget in Employee Profiles: as jobs are added to employees, any attributes associated with the job will display in this widget as read-only field. If the job attributes on the assigned job change, these fields will change as well.
- Employee Information report page: as job attributes are added to an employee, a corresponding column will become available to be added to the report page.

User Locale Settings for Job Attributes

When defining custom fields within Job Attributes, the attribute types of Date, Numeric, Currency, and Time will now be shown according to the user's locale settings. The job attributes display in the format specified in the user's locale from their employee profile and will display this way in reports and imports.

Notifications

Name Change to Created Event

To better clarify the purpose of the notification event name **Created**, the name has been changed to **Account Created**. The updated name will display in the Event field of the Notification Description section.

Performance Management

Goals: Character Limit Tool Tip Added to Name Field

Goal Categories, located under Company Settings > HR Setup > Performance Review > Goal Categories, have a 35 character limit and a tool tip has been added to **Name** field to inform users of this limit and prevent errors when entering names that exceed this value.

Recruitment

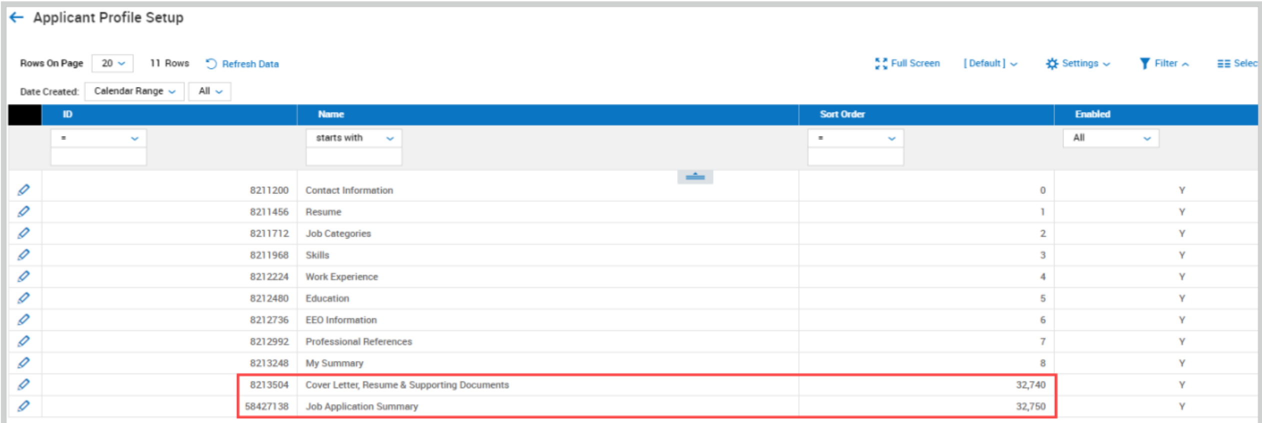
Applicant Profiles: Single/Multi View Toggle

A **Single-Column View** toggle has been added inside applicant profiles. Switching the toggle on will re-order the widgets in a single column. Switching it off will return the page to a multi-column view. This will not affect the Jump To panel on the left.

Applicant Profiles: Position & Order of Tabs

In the Applicant Profile Setup page, located under Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Profile Setup, we have placed high numbered sort orders for the tabs: **Cover Letter, Resume & Supporting Documents** (32,740) and **Job Application Summary** (32,750). These sort order numbers are not editable and are set high to ensure these two applicant tabs always appear second to last/last and in proper order as applicants work through their job applications.

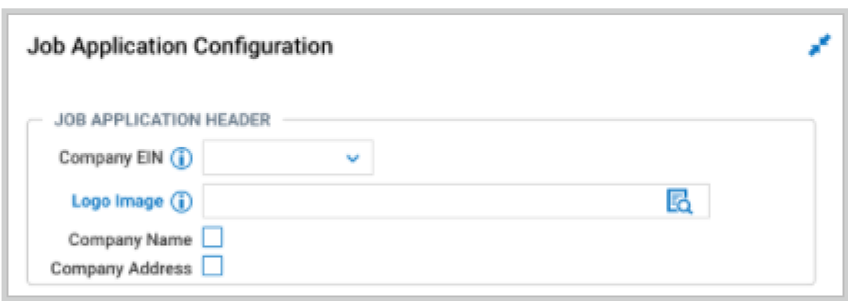
> **Important:** This change will impact all existing companies.



Job Application Updates: Adding a Logo and Header Information

A new **Job Application Configuration** widget has been added to the Applicant Tracking/Recruitment Configuration page. In this widget you can add a logo image, company name, and/or company address to the header page of your job applications. If you are multi EIN, you can select an EIN to apply the changes. You may need to add the widget via the Edit Tabs option.

The Logo Image title is hyperlinked and when clicked will link out to **Company Settings > Global Setup > Look & Feel > Upload Images**. Here, you can upload and manage images. This information will be shown on downloaded PDFs.



Recruiting Workspace

Recruiting Workspace: Workspace Toggle

Over the next couple of system releases the **Try the New Workspace** toggle located within Job Requisitions will be phased out and no longer available. The default view when opening a job requisition will be the workspace view.

Recruiting Workspace: Vertical Label Names

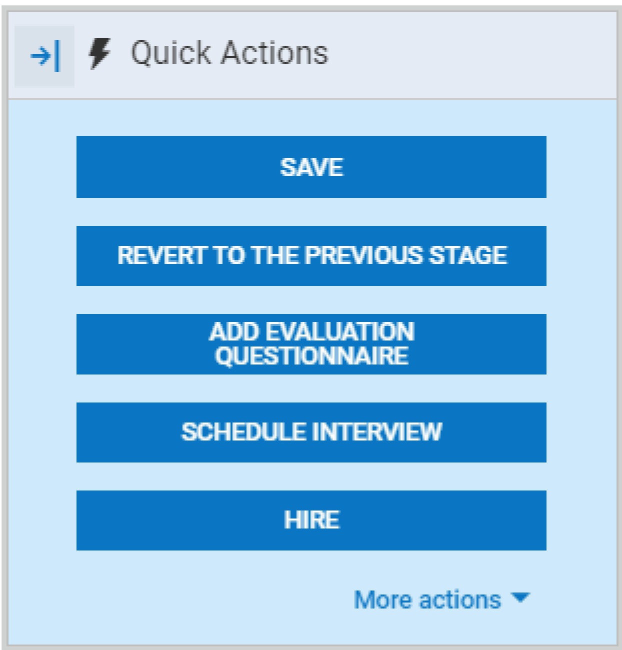
The left and right panels of the Recruiting and Employee Profiles workspaces will now display vertical labels along with the icons when those panels are minimized. This will allow you to see which options are available without having to memorize the icons. You will be able to select the options in the panels and that option will pop out without the need to pop out the entire panel.

Recruiting Workspace: Hiring in Job Applications from Applications Tab

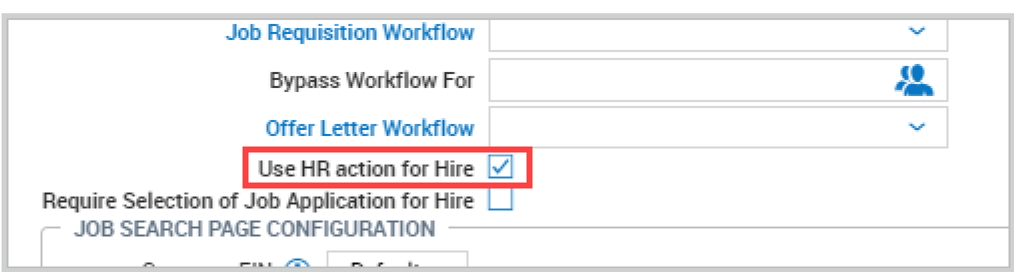
A **Hire** button option that will invoke a Hire HR Action is now available. After accessing the workspace by opening a Job Requisition, you will select the Applications tab and then in the Applications widget select the View Job Application icon for the desired applicant. The **Hire** button is in the **Quick Actions** section of the right panel.

- This button only works with Hire HR Actions and will be routed through the workflow assigned to the HR Action.
- On successful hire, the Time to Hire Report will display the record for the new hire.
- Other job applications of the same applicant will become internal applications (since the applicant was hired into another job) and no Hire button will be available.
- If an employee record is created prior to going through the hire process, the Hire button will not be available.

When the button is selected, a pop-up containing the available HR Actions will display. If there is only one HR Action, the system will automatically open it. If there are multiple HR Actions, you can select which one to use. Continue the hiring process.



To Hire using HR Action, check the Use HR Action for Hire checkbox in the Applicant Tracking/Recruitment Configuration widget, located under Company Settings > HR Setup > Applicant Tracking/Recruitment > Configuration.



Recruiting Workspace: Applicant Questionnaire Status Column Added

To give recruiters/managers more visibility about the status of applicant questionnaires, a new **Applicant Questionnaire Status** default column has been added to the **Applications** widget in the Job Requisition workspace. The widget is located under the Applications tab of the workspace.

Reports

OSHA and Worker Claim Forms Pull Data from Claim to Form

Users with access to OSHA 300A reports will now be able to run reports based on the location where an employee's accident took place. When the OSHA 300 or OSHA 300A forms are populated, employee Incidents are included based on the cost centers from the employees' worker claims and not from the default cost centers for the employees.

Time and Labor

Hot TLM Features in this Release

Leave of Absence

Custom Forms Available for LOA Companies

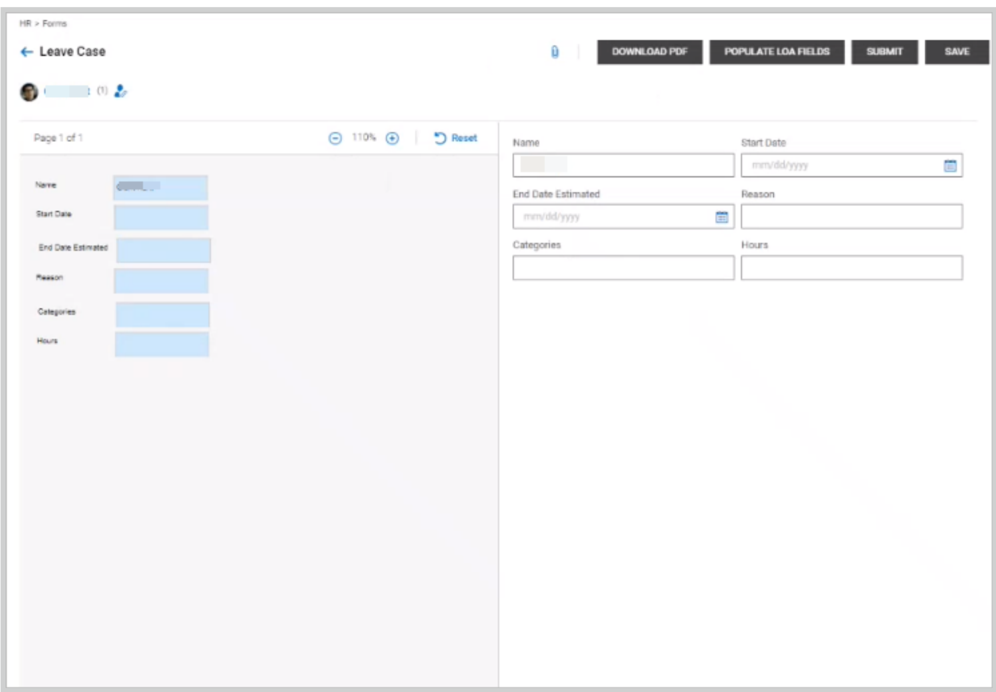
Users can now configure Leave of Absence custom forms in companies with **Leave of Absence** enabled in the **Available Functionality** widget, and **Custom Forms** enabled in the Security Profile (under **HR Tables**).

Navigate to **HR Setup > Custom Forms.** Select the **Add New** button to create a new custom form. From the **Custom Form** screen, select the **Add New Page** button, then select the **Edit Page** pencil icon to configure the custom form.

In the **Field Settings** widget, select the new option, **LOA Case**, from the **Type** drop-down. You can then enter information about the LOA case, such as the number of hours, start and estimated end dates, and reason. Regular or custom field types are available to choose from the **Field** drop-down.

Once you are finished setting up the custom form, you can assign the form from **Team > HR > Forms > Other Forms**. Select **Assign**, then choose the applicable employee.

On the **Leave Case** screen, select the **Populate LOA Fields** button

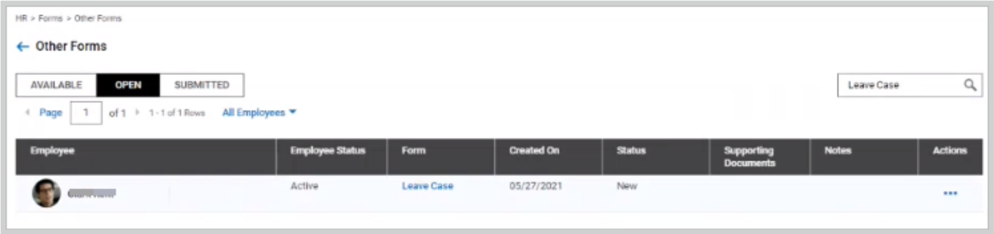


A **Populate LOA Fields from LOA Case** pop-up window will display, which will show all the employee's leave cases. Select the radio button next to the applicable case, and the **Leave Case** screen fields will populate with data.

> **Note:** If your company does not have the HR Sub-System enabled, the **Submit** button will not trigger a workflow. This will be updated in a future release.

You can download a print version of the populated leave case by selecting the **Download PDF** button.

From the **Other Forms** page, select **View Open** to view the open case.



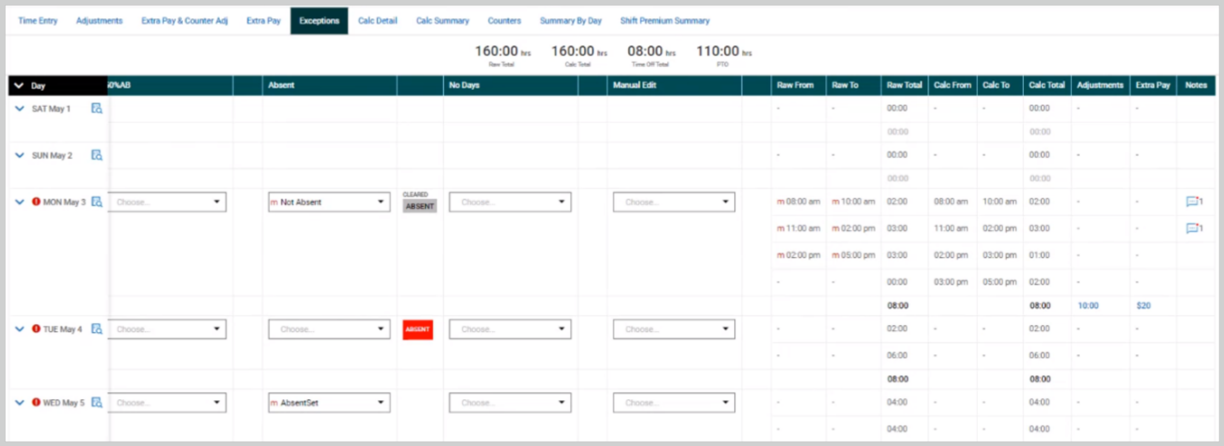
You can also preview the form by selecting the magnifying glass icon.

In the **Actions** column, you can edit, download a PDF of the form, upload a document, assign another employee, view the history, delete, and view the detailed record.

New Timesheet

Added Exceptions Tab

As previously available in the Classic Timesheet, an **Exceptions** tab is now available to add to the New Timesheet. Previously in the New Timesheet, managers could only manage exceptions from the **Time Entry** tab via the **Manage Exceptions** pop-up; the **Exceptions** tab allows managers to quickly view and manage an employee's exceptions without having to open additional pop-up windows. In addition, you can configure additional columns to display under this tab that will show data from the **Time Entry** tab.



In order for users to view the **Exceptions** tab, enable the following options in the **Exceptions** widget of the Timesheet Profile:

- At least one exception must be enabled under **Editable**. If at least one exception is not checked as **Editable**, the **Exceptions** tab will not display. Any exceptions that are enabled will display for the manager under the **Exceptions** tab.

- The setting **Show Exceptions To Employee** must be enabled for employees to be able to view the exceptions under this tab.

Additional Columns

In the Timesheet Profile, in the **Display** section underneath the **Exceptions** widget, additional columns that pull data directly from the **Time Entry** tab are available to add to the **Exceptions** tab. You can enable the following optional columns:

- **Show Raw Time Entries**
- **Show Adjustments**

> **Tip:** Adjustments will display in the **Exceptions** tab under the **Adjustments** column as a link, which will navigate you to the **Adjustments** tab when selected.

- **Show TE Notes**
- **Show Calc Time Entries**
- **Show Extra Pay**

> **Tip:** Extra pay will display in the **Exceptions** tab under the **Extra Pay** column as a link, which will navigate you to the **Extra Pay** tab when selected.

Show Daily Notes

Main Columns

The **Day** column gives managers a quick way to see if a specific date has an exception on it.

The **Schedule** column is available for managers to be able to easily see which schedule an exception is being added to or cleared from.

Exceptions calculated by a Pay Calculations rule display in their own column with the exception label and color configured for that exception. To manually set an exception, select the drop-down from in this example, the Absent column, and choose **Absent Set**. This makes it easy for managers to distinguish which exceptions were manually added and which were calculated by Pay Calculations.

To clear a calculated exception, select from the same drop-down and choose **Not Absent**. The exception will be grayed out and a **Cleared** label will display on top. If you do not have a label set for the drop-down, the field will display **Clear**.

All aspects of the **Exceptions** tab from the Classic Timesheet will function the same way in the New Timesheet.

From/To Columns Order Can be Changed

Managers can now customize the order of the **From/To** columns (which are grouped as one) on the **Time Entry** tab. This allows for the flow of the data on the timesheet to be more user-friendly for employees.

Adjust the order by arrowing up or down **From/To** in the **Time Entry Collected Data** section of the Timesheet Profile.

New Report Shows Rates that were Entered on Timesheet

Previously, there was not a report available to show custom rates entered directly on a timesheet in the **Rate** column, so users had to open individual timesheets to review this information.

What's been added: A new report, **Manual Timesheet Rates Changes**, is now available under **Team > Time > Reports > Audit Trail**. This report will display custom rate data that was manually entered on timesheets so that you do not have to open individual timesheets to review this information.

To utilize this report, navigate to **Available Functionality**, and within **Global**, enable the **Rates** and **Manual Timesheet Rates Changes** options.

Enhancements

The following enhancements have been added to this release.

Accruals

Only for Accruals 1.0: The following enhancements affect Accruals 1.0 only.

Accruals 1.0: Accrual History Report Additional Detail

As previously available in Classic, the Accruals 1.0 **Accrual History** report now displays the Employee name and Time Off when viewing the Accrual History from the **Balance** widget in Employee Information. You can also view this information from **Team > Accruals > Balances**, then select **View History**.

Accruals 1.0: Hyperlinks in Time Off Balance Cards

Previously, for employees and managers, the **Time Off Balances** cards did not contain hyperlinks for **Taken**, **Scheduled**, **Projected Accrued**, and **Projected Balance**.

Going forward, the **Time Off Balances** cards will contain these hyperlinks. In order for these fields to display, navigate to **Profiles/Policies > Global Setup > Company Setup > Global Policies**, then enable the Visible Fields within the **Accruals Policies** widget that you want displayed in the **Time Off Balance** cards.

Only for Accruals 2.0: The following enhancements affect Accruals 2.0 only.

Accruals 2.0: Apply Carry Over On Various Dates

Previously, Accruals 2.0 companies could only carry over at the beginning of a new accrual period.

What's been added: As available in Accruals 1.0 companies, Accruals 2.0 users can now configure various dates for carry over to occur, such as after an accrual period. A new drop-down, **Date To Apply On**, has been added to the **Date To Apply Carryover On** section in the **Carry Over** rule. Choose from the following options:

- Start of New Accrual Period
- Calendar Day
- First Day of First Pay Period
- First Day of Last Pay Period

- n-Days after New Accrual Period
- n-Months after New Accrual Period

> **Note:** **Start of New Accrual Period** is the default option; configurations of preexisting carryover rules will not be impacted.

Accruals 2.0: Export Payroll Format: Added Accrual Category Option

Previously in Payroll Export Format, Accrual Time and Day information was available, but users did not have the option to include an Accrual Category name and additional information.

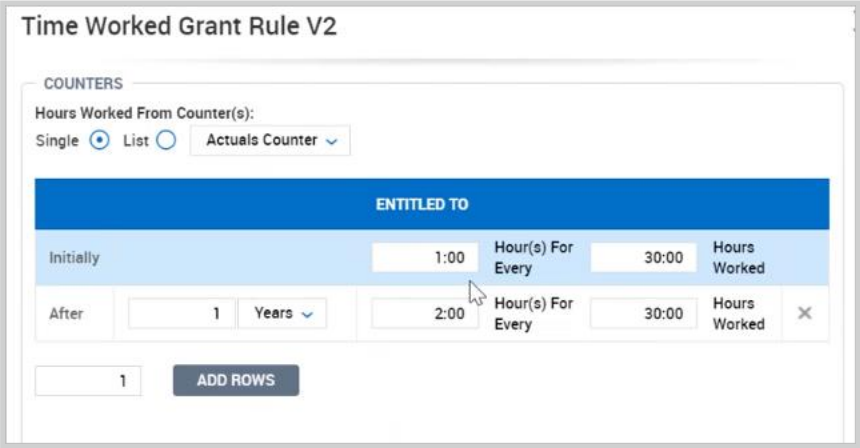
What's changed: The **Accrual Category** can now be included in Payroll Export Format, where you can enter the Name, Description, External Id, and Payroll Category.

Accruals 2.0: Time Worked Grant Rule V2

The **Time Worked Grant** Accruals rule has been updated to **Time Worked Grant V2**.

> **Note:** The **Time Worked Grant V1** rule will continue to work, but if you need to update configuration in this rule, you will need to use the **Time Worked Grant V2**.

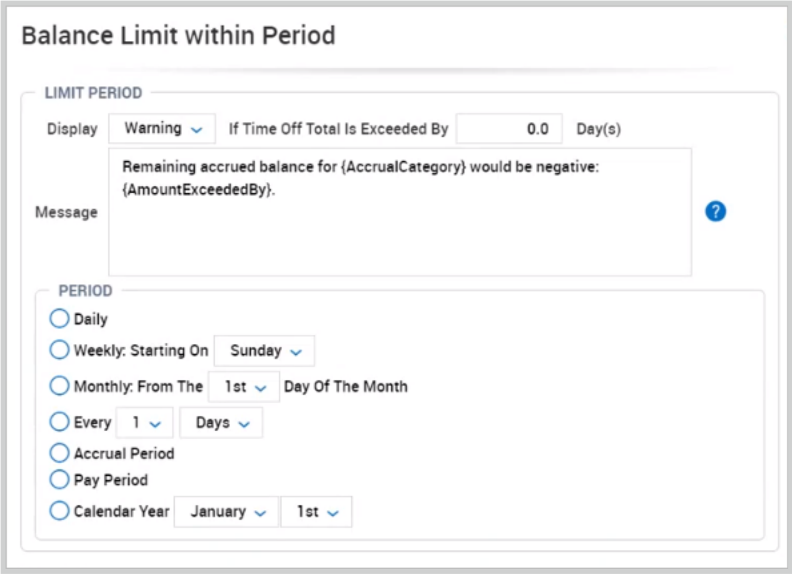
In the **Entitled To** table define how much the employee accrues based on how many hours they work. In the previous version of this rule, the system entered a default calculation of days worked; in this new version of the rule, you can define the number of hours that an employee must work.



All other settings in this rule work the same way as V1.

Accruals 2.0: Limit Time Off Taken in Period

A new Accruals rule has been added, **Balance Limit within Period**, which allows you to set a limit on the amount of time off that can be taken within a defined period.



This rule defines what an employee will have as an Available Balance (what an employee has available to use during the period) versus Total Balance (total amount an employee has accrued). Based on the parameters you set in this rule, the balance will not exceed that amount. The employee's Available Balance will display in the **Accruals** widget of the employee's profile, as well as in the **Time Off Balances** cards.

Accruals 2.0: Balance Widget Hyperlinks for Accruals Policies

As previously available in Accruals 1.0, in the **Balance** widget in the Employee Profile, Accrual Policies under the **Type** column are now hyperlinks that will take users with view security permissions for Accrual Profiles directly to the Accrual Policy configuration in the Accrual Profile.

Accruals 2.0: Hyperlinks in Time Off Balance Cards

Previously, for employees and managers, the **Time Off Balances** cards did not contain hyperlinks for **Taken**, **Scheduled**, **Projected Accrued**, and **Projected Balance**.

Going forward, the **Time Off Balances** cards will contain these hyperlinks. In order for these fields to display, navigate to **Profiles/Policies** > **Global Setup** > **Company Setup** > **Global Policies**, then enable the Visible Fields within the **Accruals Policies** widget that you want displayed in the **Time Off Balance** cards.

Accruals 2.0: Disclaimer in Accrual/Global Policies

As available in Accruals 1.0, in Accruals 2.0 companies, a **Disclaimer** field has been added to **Global Policies**, **Accrual Policy Settings**, and **Accrual Policies**. The field allows for up to 1024 text characters, and if used, will display in the **Accrual Balance** widget in Employee Information. You have the option to set a disclaimer for each Accrual Policy.

In addition, a **Disclaimer** field will now be available in the **Accrual Balance** widget in the **Time Off Request** screen.

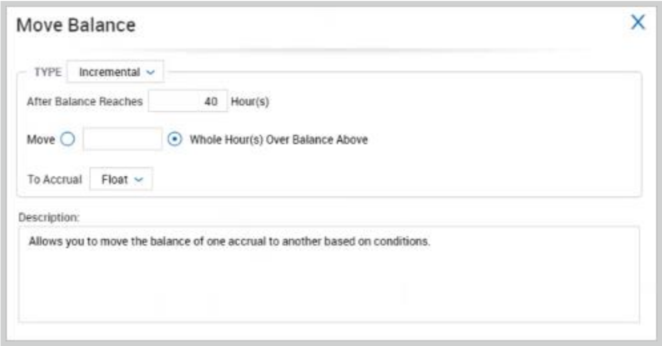
Accruals 2.0: Issue with Remaining Balance and Time Off on Same Day

Previously, when a manager used the **Change Remaining** option to update an employee’s remaining balance as of a specific date, any time offs later added for that same date were not deducted from the remaining balance. With this update, any time offs added for the same date as specified via the **Change Remaining** option will be deducted from the employee's remaining balance.

Accruals 2.0: Move Accrual Balance

You can now move an Accrual balance at any time if it exceeds a configured threshold.

What's been added: A new Accruals rule has been added, **Move Balance**, which allows you to move the balance of one accrual to another based on the conditions set.



> **Note:** **Incremental** is currently the only Type available. Other Type options will be available in future releases.

Enter the number of hours that need to be reached in order for the balance to be moved, then specify which accrual the balance should be moved to.

Accruals 2.0: Negative Balance Did Not Expire

Previously, negative Accrual balances did not expire on the date/date range set in **Expiration**.

Going forward, negative Accrual balances will expire based on the configured dates, as expected.

Cost Centers

Cost Center Lookup Redesign: List/Tree Sticky View

When you click **Browse** in the cost center field, whichever view you previously selected a cost center from, will display.

> **Example:** If you selected from the Tree View, the **Tree View** tab will display by default when the **Browse and Select Cost Centers** pop-up displays.

Custom Forms

Points Details Field Available for TLM Only Companies

In the February 2021 system release, we added a **Points Details** field in Custom Forms for **Type = Employee**. In that release, this field could only be used by TLM companies who also had the HR sub-system enabled.

What's new: In this release, we have added the **Points Details** field for TLM only companies. This is configured under **Team > Time > Points > Custom Forms**. Select **Type = Employee** and the **Field** drop-down will display only the **Points Details** option.

The **Points Details** field is still available in HR only companies.

Allow Multiple Alternate Managers

Previously, managers could delegate to only one manager at a time.

What's changed: Under **Settings > Global Setup > Groups > Manager Group Access**, a manager now has the ability to assign up to five alternate managers who will have the same permissions as the original manager. They will also receive the same To-Do items.

Leave of Absence

ESS View Entitlement Widget

Previously, only managers and HR Admins could view employee Leave of Absence entitlement balances.

What's been added: Employees can now view their LOA entitlement balances and expiration dates.

An **Entitlement** widget will now display in the employee's **Leave of Absence Request** screen (**My Time > Leave > Request**). This widget includes the Leave of Absence **Category**, **Entitlement** amount, number of hours **Taken**, **Taken As Of** date, and the **Balance** the employee has left.

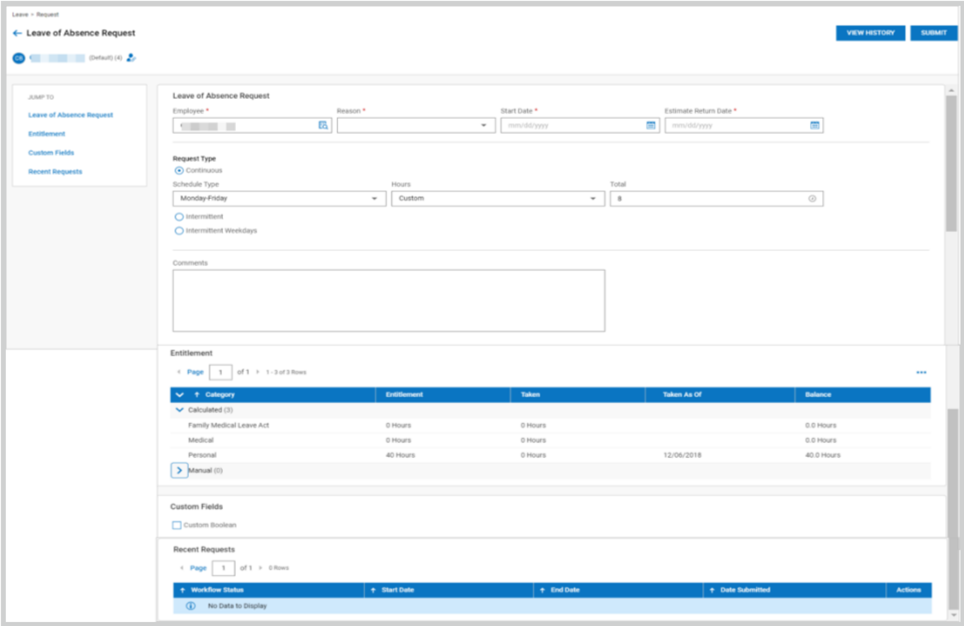
In order for the **Entitlement** widget to display for employees, navigate to the their Security Profile and within the **Tools & Documents** widget under the **ESS** tab, enable **My Leave Entitlements**.

MSS Request Leave on Behalf of an Employee

Previously, managers could not create leave requests on behalf of their employees, they were limited to creating cases.

What's new: Managers can now create requests on behalf of their employees. A new Menu item, **Request**, has been added under **Team > Leave**.

From the **Leave of Absence Request** screen, when you choose an employee, the screen will populate with **Leave of Absence Request**, **Entitlement**, **Custom Fields**, and **Recent Requests** widgets to fill out on behalf of the employee.



The **Entitlement** widget on this screen is available for managers with the **Manage Requests** checkbox under the **HR** tab enabled in their Security Profile.

Manual Entitlement Setting for LOA Categories

In the **Entitlement** widget for managers and employees, **Calculated** and **Manual** data can be included.

For manual data to be included in the **Entitlement** widget, navigate to the Leave of Absence Profile and in the **Categories** section, enable the checkboxes under **Manual Entitlement** for any created LOA categories.

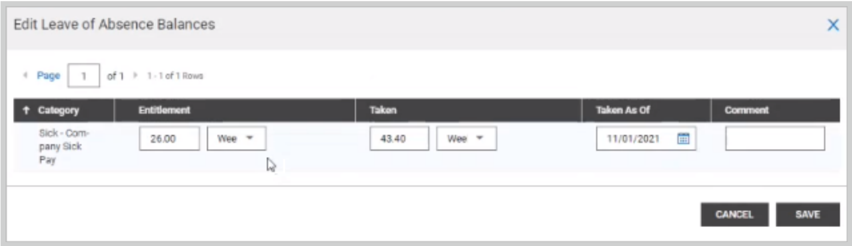
If a category is checked as **Manual Entitlement**, that category will not be an option to choose from the **Leave of Absence Category** drop-down in an Entitlement rule. If a category is already being used in any of the Entitlement rules, you will not be able to check **Manual Entitlement** box for that category.

For categories that are manual, the category name will display with 0 under **Manual** in the **Leave of Absence** widget in Employee Information.

Manually Adjust Entitlement Balance

Previously, users could only update entitlement balances using an API or import.

What's changed: Users can now manually add, deduct, or set an entitlement balance. From the **Leave of Absence** widget in Employee Information, select the three-dot ellipsis and choose **Edit Leave of Absence Balances**. An **Edit Leave of Balances** pop-up window will display so that you can manually edit the balances.



New Leave of Absence Entitlement Rules Added

Three new rules have been added to the Leave of Absence Entitlement rules:

- Entitlement Based On Averaged Worked Hours
- Entitlement Based On Averaged Worked Hours (Counter)
- Entitlement Based On Averaged Scheduled Hours

Pay Calc 2.0: Enhanced Round In/Out Time Rule

For companies that are required by law to pay for each minute an employee is on site, including time spent answering Attestation health screenings, the system can round in increments of clock time, but there was previously not an option for rounded start time.

What's been added: In the Pay Calc 2.0 rule, **Round In/Out Time**, a new section has been added in the **Round Rules** pop-up, **Round By**, which will round the actual punch time back or forward. Select an amount of time to round by, then choose if the system should round the time down (back) or up (forward).

> **Example:** The rule is configured for employees to have 5 minutes rounded down to answer an Attestation question before starting work, so if an employee punches in at 7:50 AM, they would get paid starting at 7:45 AM. The rounded time is reflected in the **Calc From** column in the timesheet.

Pay Calc 2.0: Workday Breakdown Worked Incorrectly with Default CCs

Previously, workday breakdowns did not process Time Off by time entry when employees had **Default Cost Center** in their Workday Breakdown profiles.

What's been added: A new setting, **Distribute Per Time Entry**, has been added to the **Distribute By Workday Breakdown** rule. When this setting is enabled, each time entry will be processed to distribute Cost Centers according to the Workday Breakdown profile.

> **Tip:** When the rule is set up in conjunction with other rules that split time entries, the **Use Calculated Time** setting should be enabled.

Points

Points Accumulated for Dates when Employees were Terminated

Previously, when an employee was terminated and re-hired, the dates that they were terminated and not active in the company were still accumulating points.

What's been added: For TLM + Payroll and TLM + HR companies, a new checkbox setting has been added to the Points Profile, **Do not calculate points for days which fall between terminated and rehired date**. When this setting is enabled, termination dates will not be included in the point calculation.

Reports

Added Page Level Buttons to All Punches Report

From the **All Punches** report, users can now easily switch to other reports,

- **All Punches Summary**
- **All Punches Details**

via the following action buttons at the top of the page:

- **Detailed**
- **Summary**

Added Page Level Buttons to Calculated Time Reports

Under the following Calculated Time reports,

- **Time > Reports > Calculated Time > Detailed Calculated Time**
- **Time > Reports > Calculated Time > Calculated Time Summary**
- **Time > Reports > Calculated Time > Calculated Time Summary > Calculated Time by Work Day**
- **Time > Reports > Calculated Time > Calculated Time Summary > Calculated Time by Week**
- **Time > Reports > Calculated Time > Calculated Time Summary > Calculated Time by Calendar Day**

users can now easily switch to other reports,

- **Detailed Calculated Time (Counters)**
- **Detailed Calculated Time (Counter Summary)**
- **Detailed Calculated Time (Time Entries)**

via the following action buttons at the top of the page:

- View Counters
- View Counter Summary
- View Time Entries

The **View By** toggle that was previously in the **Current View** drop-down in these reports is no longer available.

All Cost Centers Report: Mass Edit & New Columns Added

A **Mass Edit** button has been added to the **All Cost Centers** report, located under **My Info > My Reports > System Reports > System Utilities > All Cost Centers**. This option will allow you to enable/disable the **Visible** and **Allow Time Allocation Towards** settings within cost centers. This is useful for companies who no longer want time allocated against cost center or to even have it visible to users.

Within the report, add the **Checkbox: Select Row** column. This will enable you to select one or more cost centers which will then activate the **Mass Edit** button. Upon selecting the button, a pop-up displaying the two settings will display. Checking the options makes them active. Unchecking them deactivates those settings.

To allow you to report and filter on each cost center level within the cost center full path, the following columns have been added to the report. When adding columns to the report, you will see 10 entries for each of the below.

- Cost Center Name (1-10)
- Cost Center Description (1-10)
- Cost Center Abbreviation (1-10)
- Cost Center External ID (1-10)
- Cost Center Payroll Code (1-10)

Display Comment Added by Employee on TSCR Report

Previously, when comments were added by an employee in a timesheet change request, there was no option for the employee to view their comments after the change request was submitted.

What's been added: A **Request Comment** column is now available to add to the **Timesheet Change Requests** report for employees (**My Time > Timesheet > Change Requests**). This will allow employees to view their comments that were entered in a submitted timesheet change request.

Note Text Column in Attestation QA Report Updated

Previously, the **Note Text** column in the Attestation **Questions and Answers** report included the employee's name and time stamp of the time entry, which is information that is already contained in the **First Name**, **Last Name**, and **Completed On** columns.

What's changed: The **Note Text** column in this report will now only contain the Attestation prompt comment entered by the user.

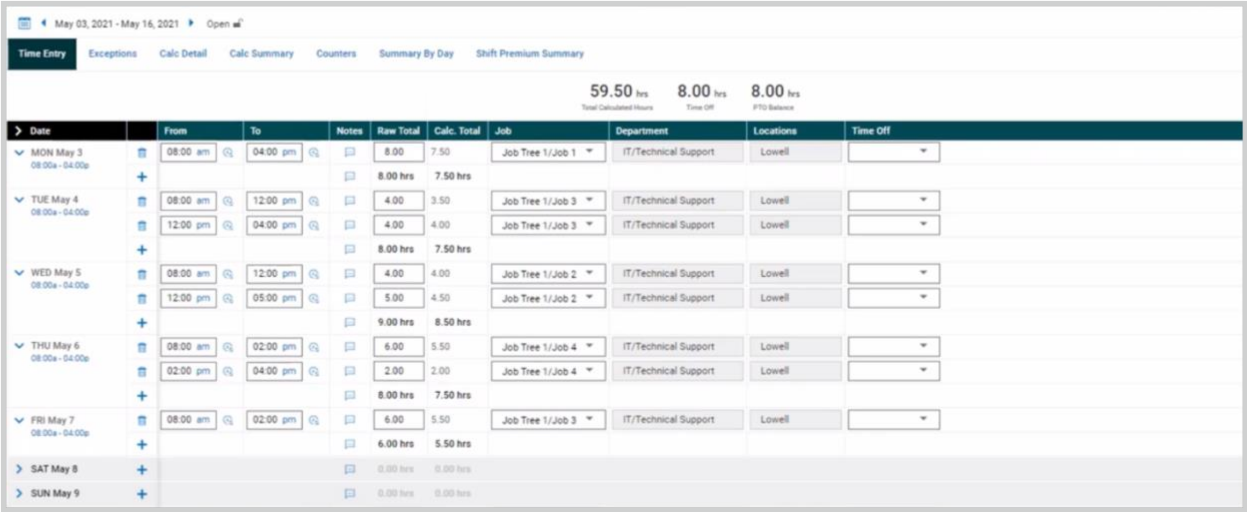
Time Off Roster Export Updated

In the previous release, the cells in the **Time Off Roster** report displayed colors configured in the time off definitions. In this release, when you export the **Time Off Roster** report as a PDF, the export will display the report with these colors.

Timesheet

> **Important:** The Classic Timesheet is being retired soon and will be replaced with the New Timesheet. Be sure to try out the New Timesheet Experience before the toggle button is removed during the next release cycle between June 14th and July 29th.

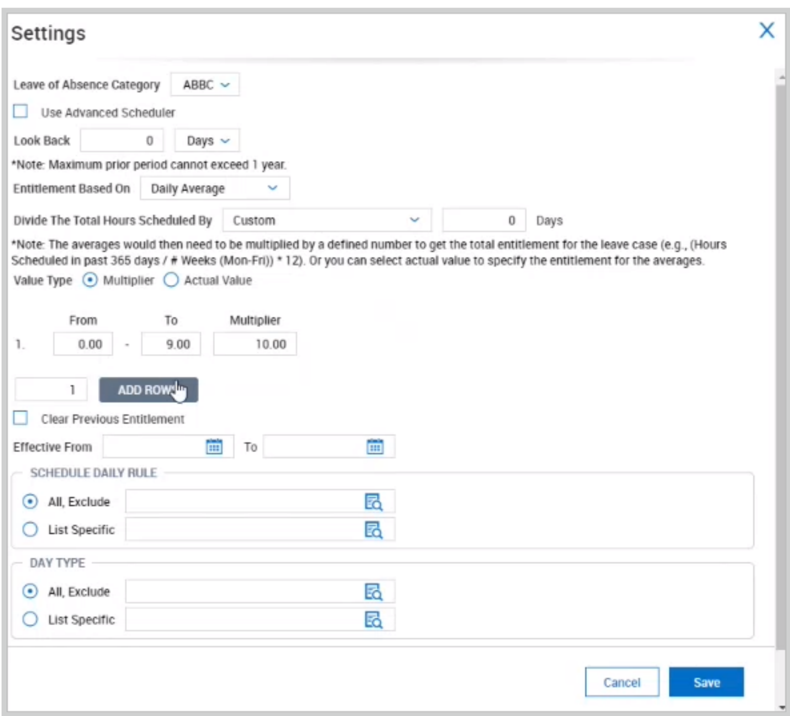
The following is an example of the **Time Entry** tab on the New Timesheet for a Start/End (All Days) timesheet profile:



Adjusted Fields in Timesheet Columns on Editable Tabs

Previously, when only a few columns were enabled on the new timesheet, some of the dynamic columns displayed excessively wide.

What's changed: The widths of the column fields for editable tabs (**Time Entry**, **Extra Pay**, **Extra Pay & Counter Adj**, and **Adjustments**) will now be limited so that all columns will display in proportion to one another.



These are look back rules that allow you to set up a Leave of Absence category or counter where it looks back up to one year and calculates what the average scheduled hours worked were.

From the **Divide the Total Hours Scheduled By** drop-down, choose from the following options:

Counters (if using the Counter version of the rule)

- **The Number Of Calendar Days**
- **The Number Of Contracted Days** (the system will calculate how many days employees are contracted for, which will be used to calculate the average)
- **The Number Of Days Scheduled**
- **The Number Of Weekdays (Mon-Fri)**

Indicate if your company is using Advanced Scheduler or not by enabling/disabling the **Use Advanced Scheduler** checkbox.

The **Look Back** period can be defined by the number of days, weeks, etc.

If you choose **Multiplier**, enter the time in the **From** / **To** fields (number of hours an employee works), and enter a number value in the **Multiplier** field, which is the number that is the employee's entitlement. You can also set up multiple tiers for increments of entitlement hours. The same logic is applied to **Accrual Value**, except that this uses values.

If **Use Advanced Scheduler** is not enabled, you can filter out a **Schedule Daily Rule** and **Day Type**.

You also have similar options to other entitlement rules, such choosing the Entitlement period and enabling **Clear Previous Entitlement**.

If you are configuring the **Entitlement Based On Averaged Worked Hours** or **Entitlement Based On Averaged Worked Hours (Counter)** rules, the rules work the same way except that they calculate the average worked hours.

Another difference is that **If Any Time Entry Matches Filter** is available for these two rules, which is a time entry filter that picks up specific time entries.

If you are a Pay Calc 2.0 company and are using the **Entitlement Based On Averaged Worked Hours (Counter)** rule, you will have the option to use the **Counter Eligibility Filter**.

Cost Center Lookup: Quick Search Option

A **Search** tab in the timesheet Cost Center lookup is now available for mobile devices so that you can quickly search for cost centers by name. When you open the browse for cost centers option, the **Search** tab will display by default.

Cost Center Manager Could Edit Time Entries After Timesheet Approved

Previously, when a direct manager submitted the final approval of their employee's timesheet, cost center managers could still access the employee's timesheet and edit their time entries, despite the approved timesheet being read-only and ready for Pay Prep.

What's been added: A new setting (disabled by default), **Restrict Editing Time Entries On Approved Timesheets**, has been added to the **Managed Cost Centers** widget. When this setting is enabled, cost center managers will be prevented from editing time entries from a timesheet that is in the Approved (Pay Prep Ready) status.

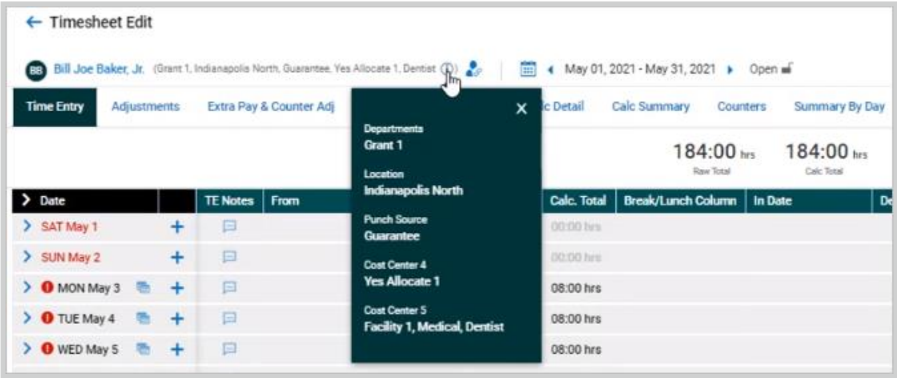
Display Account EIN on Printed Timesheet

Previously for multi-EIN companies, the default company EIN name displayed on the employee's printed timesheet regardless if they were in a different EIN.

Going forward, if a company is multi-EIN and **Header** is enabled in **Print Settings**, an employee's account EIN will now display both in the header of the print preview and in the printed timesheet.

Display Employee Default CC Next to Employee Name and Tooltip

Users now have the option to see an employee's Cost Center name and full path next to their name on the timesheet.



What's been added: In the Timesheet Profile, within the **Extra Settings** section, a new widget option has been added, **Display Default Cost Center**.

When this option is checked, the following will display that you can enable:

Display Full Path Tooltip: If this option is enabled, a tooltip icon will display next to the employee's name on the timesheet, and when you hover on the tooltip, the tooltip window will display the name of the Cost Center and the full path.

Default Cost Center 1-9: You can enable up to 9 default cost centers, which will display in parenthesis next to the employee's name, with each separate Cost Center name separated by a comma. Only the Cost Center name will display, not the full path.

Fixed Columns in Bulk Timesheet

Previously, when scrolling horizontally in the Bulk timesheet, users lost visibility of data columns for the time entry, which made it difficult for users to enter time data accurately.

What's changed: When users scroll horizontally on desktop, the left side of the timesheet that contains the following columns will now remain fixed:

- **Cost Center**
- **Time Off**
- **Duration Type**

- **Shift Premium**
- **TE Extra Fields**
- **Rate Tables**

Fixed Columns in Start/End Timesheet

In the previous release, the **Date** and **Action** columns under the **Time Entry** tab were fixed at the left of the timesheet so that you can always see the data in these columns when you scroll. In addition, the Daily Totals were moved from above the days to below the days in order to improve the flow of time information.

In this release, the **Date** and **Action** columns in all other tabs in the timesheet (**Extra Pay**, **Extra Pay & Counter Adj**, **Calc Detail, Piecework** and **Adjustment**) will also remain fixed at the left of the timesheet. In addition, the Daily Totals have been moved from above the days to below the days in these tabs.

Link to Most Recent Timesheet that Falls Past Termination Date

As previously available in the Classic Timesheet, in the New Timesheet, when attempting to access a terminated employee's Current Timesheet from their **Employee Quick Links** and the timesheet dates fall past the termination date, the system will now display a message with a hyperlink to the last accessible timesheet.

New Adjustable Blank Column

Previously, when only a few columns were enabled in the timesheet, one or two of the columns filled most of the timesheet space, which provided unnecessary blank space.

What's changed: A blank column has been added on the right of the timesheet. It has unlimited extension, which gives you the flexibility to control the width space of the other columns through this blank column.

Timesheet Mini Header

In the event that the timesheet does not horizontally fit the screen, a mini-header will appear with all the action buttons, icons and secondary punch buttons. The punch buttons will display in the form of split buttons, as seen in the mobile device footer.

Timesheet Print Option Includes Days with No Data

For managers or employees printing timesheets, users now have the option to include all days of the period, even those without data (time entries or meta data).

What's been added: The Timesheet **Print Settings** now contains a new setting, **Include Days Without Entries**, under **Time Information**.

When this setting is enabled, the printed timesheet will include all days on the timesheet, including those without time entries or meta data. When this setting is disabled, the printed timesheet will only include days with data.

Time Off

NEW Updated Time Off Calendar by Month

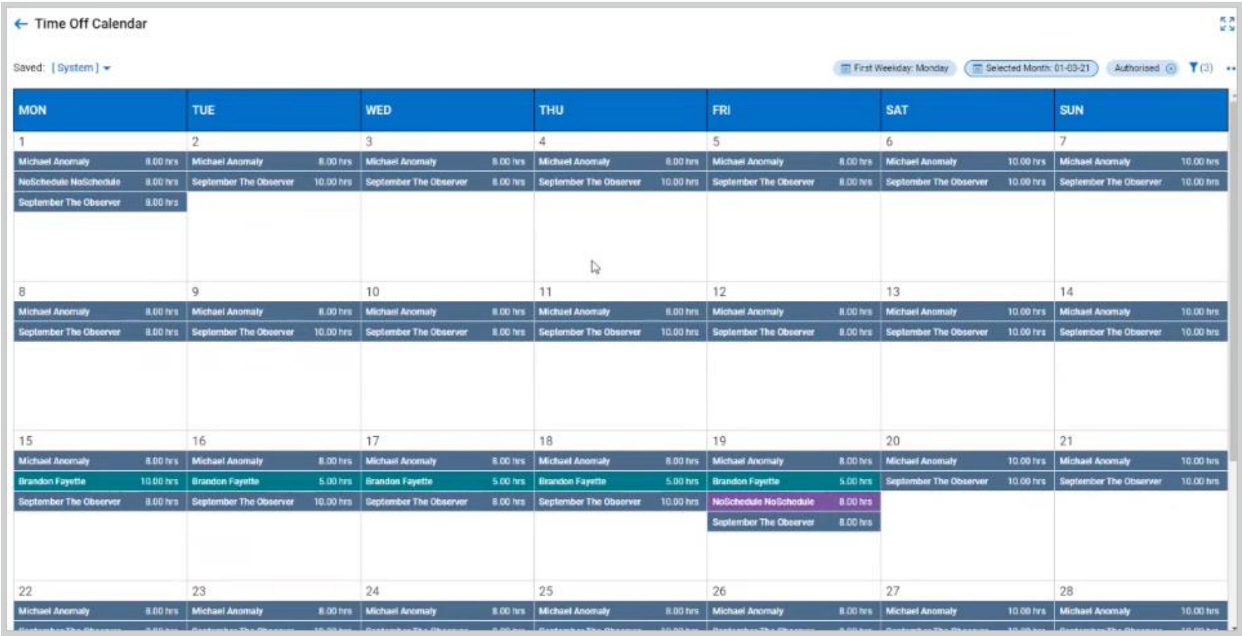
> **Important:** The Monthly Time Off Calendar report will be enhanced with the new look and

feel during our next release cycle between June 14th to July 29th.

WFR-188943: The **Time Off Calendar by Month** report (under **Team** > **Time** > **Time Off** > **Reports** > **Time Off Calendar** > **Time Off Calendar by Month** or **My Reports** > **Time Reports** > **Time Off Calendar** > **Time Off Calendar by Month**) has been updated to a new look.

Note: The **Time Off Calendar by Year** and **Time Off Calendar by Week** reports will be updated to a new look and feel in a future release.

This responsive monthly view of the **Time Off Calendar** report includes events and approved and pending approval time offs.



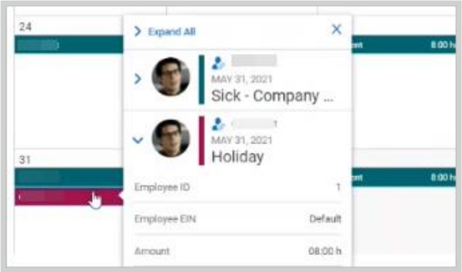
The following is an example of the **Time Off Calendar by Month** report in a mobile device:

Time Off Calendar: Pop-Over/Pop-Up

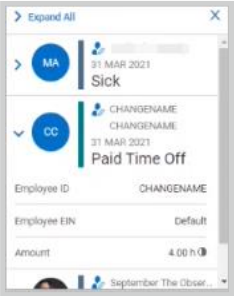
One of the new features of the updated **Time Off Calendar by Month** report is the ability to select the time off event on the calendar and a pop-over will display so that managers can see the details of the employee's time off. For multiple time offs, the date range will display in the pop-over, even though the events will display separately in the calendar.

If there are multiple time off events in a calendar day, whichever time off you select in the day, that will display first in the pop-over with the other time off events below it. You have the option to expand and collapse the details in the pop-over.

If there is a time off range, the range will display, as well as the total amount of time in the time off.



Visual indicators for Dynamic Duration time offs will display in the event pop-over and calendar days. These icons show the time off duration. The duration icons will display for pending and approved time offs for single and multiple days.



Employee time offs will display in order of approved then pending. If all of the time offs cannot fit in the screen, a **1+** icon will display, which you can select, and **A Time Off Information** pop-up will display all of the time offs for that day. You can also select the date to access to the same pop-up. You can filter from the **Filters** window which types of time offs should display in this pop-up.

Time Off Calendar: First Weekday

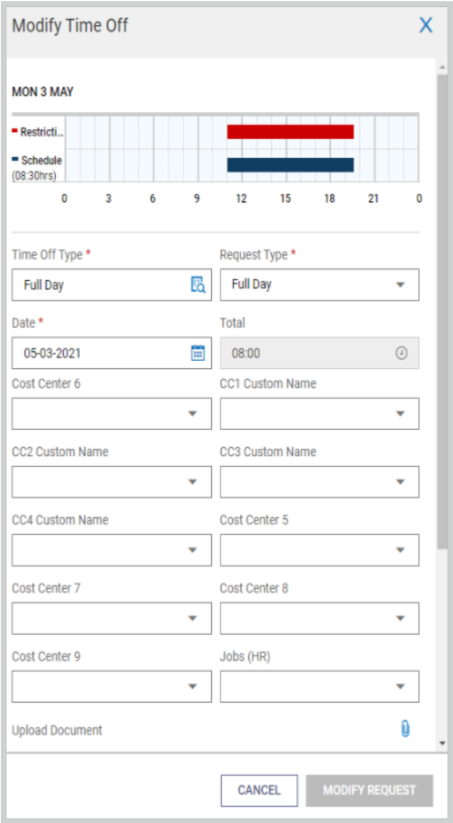
Managers can change the first weekday in the **Time Off Calendar by Month** report. From the **First Weekday** filter, you can choose which day of the week the Time Off Calendar should start on. You can also save this as a saved view.

Time Off Request Documents: Delete and Edit Icons

If the Time Off Profile setting, **Time Off Requires Attached Document** is enabled, the delete and edit icons will not be available for consolidated and non-consolidated time offs in the **Employee Documents** report.

Time Off Request: Timeline on Time Off Modify Pop-up

If security permissions are enabled and if available in the Time Off Profile, the timeline that displays Restrictions and Schedules that is currently available in the **Time Off Request** pop-up, **Time Off Request Calendar**, My To-Dos, **All Open** report, and **Pending Approval** report, will now be available in the **Modify Time Off** pop-up.



Time Off To Dos: Added Notes Pop-Up

Previously, managers could not view comments in their My To Do Items while approving time offs.

What's been added: A **Comment** field with a notes icon has been added to My To Do Items for **Approve/Reject Time Off Request** so that managers can read the comment when reviewing their To Do Items.

Time Off To Dos: Extra Approval Items Bypassed when Approving Time Offs

Previously, when managers mass selected multiple time offs in their My To Do Items then selected **Approve** or **Reject**, the **Unresolved Items** pop-up was ignored, and managers could not choose to resolve the actions or skip.

This has been fixed, and going forward, the mass/single time off approval functionality in My To Do Items will work as expected, including the **Unresolved Items** pop-up displaying for managers to take action.

Workflows

Added Approve Level 1 Override Selection to Recipient List

Previously, the Approve/Reject step of the Timesheet Workflow did not contain the option **To Be Completed By: Approve Level 1 Override group**.

What's changed: An **Approve Level 1 Override** option has been added to the list of available approvers in the **To Be Completed By** drop-down within the **Approve/Reject** step of the Timesheet Workflow.

In addition, a new checkbox setting, **Skip Override Managers**, has been added to the **Approve/Reject** step to separate managers of specific approve levels and the ones with override permissions. This checkbox will appear when Approve Level X is selected in the **To Be Completed By** field, which when enabled, will limit To-Do Items being generated for managers without override permissions.

Added Warning Message on Global Policies Tab

A warning message, **This company is not using workflow functionality made mandatory in R74. Please update Workflow Policy: (workflow type)**, has been added to the **Global Polices** tab if your company still uses non-workflow functionality.

Attestation Workflow Notes Tag

Previously, for employee who are required to submit a reason and/or note with their Attestation response, there weren't notes and reason code tags available in the **Attestation Workflow Generate Notification** step.

What's been added: Two tags have been added to the **Attestation Workflow Generate Notification** step, **Attestation_Note** and **Attestation_Reason_Code**, which can be included in the notification email for the manager to review the employee's Attestation note and/or reason code.

Display Comment from TSCR in Timesheet Notes

When employees enter comments in a Timesheet Change Request, those comments will now display in the timesheet both in the time entry notes under the **Notes** column and in the **All Timesheet Notes** at the top of the timesheet.

TSCR Approved Notification: Added Tag

Previously, details of the approved change request were not included in the body of the approved notification.

What's changed: A tag will now be included by default in the Global Notification and **Generate Notification** step of the Timesheet Change Request workflow. The tag will display as a table containing information related to the old and new values related to the approved change request.

Feature Retirements

The following table describes functionality that has been retired or is planned to be retired.

Product or Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
TLM	Classic Timesheet view	N/A	All	All timesheet users will be switched to the New Timesheet view, and the Classic Timesheet view will no longer be available.	Next release cycle: June 14th to July 29th.
TLM	**Rules Analysis** page	**Team >Time > Reports > Time Allocation > Rules Analysis** and **My Info > My Reports > Time Allocation > Rules Analysis**	All	This page will no longer be supported.	June 2021
TLM	TLM Classic **Time Prep** screen	N/A	All	All TLM Time Prep users will be switched to the updated Time Prep screen, and the Classic screen will no longer be available.	Next release cycle: June 14th to July 29th.
TLM	Classic **Time Off Calendar by Month** report	N/A	All	The Classic Time Off Calendar by Month report will be updated to the new look and feel, and the Classic report will no longer be available.	Next release cycle: June 14th to July 29th.

Payroll

IMPORTANT! Quick Payroll Under Construction

In the February 2021 release notes, we notified you that we are in the process of making some needed and required UI changes to Quick Payroll, and that the functionality would not be available when the April 2021 release was applied to your server. We mentioned that the unavailability probably would extend into future releases. As of this release (June 2021), the work is still continuing. When it is ready, we will notify you in the release notes.

Base Compensation Maintenance Menu Path

The menu path to access Base Compensation Change Reason Codes has been changed to **Company Settings > Global Setup > Global List Definitions > Base Compensation Change Reason Codes**. This change was made to allow Payroll-only companies to access and customize their Base Compensation Change Reason Codes. The Base Compensation required checkbox in the Account Policies widget of Company Setup will now be hyperlinked for both HR and Payroll only companies. The hyperlink will take you to the menu option mentioned above.

> **Note:** If a company containing both HR and Payroll sub-systems is copied and HR is then disabled in the copied company, the new menu option and hyperlink will be available in the copied company containing only the HR sub-system.

COVID-19 Healthcare Credits

Based on additional research, the COVID-19 Health Care credits will now only include ER contributions from deduction codes that have been identified as Eligible for Healthcare credits. Previously, the system included Employee Pre-Tax deductions (if selected on the deduction code), in addition to Employer Contributions. The **CAA and ARPA User Guide** will be updated to reflect the following:

FFCRA Healthcare Credits: These are credits in addition to the FFCRA wages. The system calculates the credit by taking the percentage of healthcare credit that is associated with the FFCRA wages, like this:

> (FFCRA wages/Total Wages)*(ER cost of post-tax health insurance)

CARES Healthcare Credits: CARES Healthcare Credits are included in the maximum retention credit. The system calculates the credit by taking the percentage of healthcare credit that is associated with the Retention wages, like this:

> (Retention Wages – any FFCRA wages)/(Total wages)*((ER cost of post-tax health insurance)*70%)

Updates to W4 Forms

The following W-4 forms have been updated as follows.

- **Oklahoma**: Current version.

- **Idaho**: Current version. The middle initial of employee now populates form. Line 2 of the non-resident alien section now uses $12,550 for the calculation instead of using $12,400 (Line 1 x $12,550).
- **Form 2020 W4** field in W4s: Changed the field label to **Form W4 2020 and later.**
- **W4 field defaults and order:** To improve the experience for users filling out W4 fields, several fields now default to the correct values and appear in the same order as they appear on the final W4 form.

Scheduler

Hot Features in this Release

Reports

Scheduler Reports Auto Filter

Previously, for any of the Scheduler reports, managers could see all scheduled cost centers listed in reports despite not being able to edit or view any schedules that they did not manage.

What's changed: The system will now filter out any scheduled cost centers that a manager does not have manage permissions assigned so that managers will only be able to see their managed scheduled cost centers from any of the Scheduler reports.

Scheduling Engine

Added Seniority and Skill Level as Criteria when Auto Assigning Shifts

Previously, employee seniority date and skill level had no effect on the scheduling engine criteria for auto assignment.

What's changed: An employee's **Seniority** date in the **Dates** widget of the Employee Profile will now be considered by the scheduling engine for shift auto assignment, provided that there are no constraint or availability violations. In addition, **Skill Level** in the **Skills** widget of the Employee Profile will also be considered by the scheduling engine.

As of this release, the seniority date takes precedence over skill level.

> **Example:** If employee A and employee B qualify for the same shift but employee A has an older seniority date, the scheduling engine will assign the shift to employee A. If employee C has a lower skill level than employee D, but employee C has an older seniority date, employee C will be assigned the shift. If employee E has a higher skill level than employee F and seniority dates are not chosen for both employees, employee E will be assigned the shift.

Basic Scheduling

Notifications were Not Generated via List Schedule Entries Report

Previously for TLM and TLM + Scheduler companies, when users selected the **Generate Notifications** button from the **List Schedule Entries** report (**Team > Schedule > Team Schedule View > List Schedule Entries**), the system confirmed through a message that the notifications were generated, but the notifications were not actually processed for the selected employees.

Going forward, the system will generate notifications from the **List Schedule Entries** report when **Generate Notifications** is selected, as expected.

Updated TLM Basic Scheduling Manage Shift Window

As previously available in Classic, the **Manage Shift** window in any of the TLM Basic Scheduler screens will now display **Time Off** underneath **Availability/Preferences**. The Time Off name will display (unless it is private) next to the time off hours if it is configured in Time Off Settings.

Schedule Fairness

Allow Schedule Fairness Approval for Expired Shift Dates

Previously, Schedule Fairness did not trigger when changes were applied to a shift with an expired date (a shift in the past).

What's changed: Schedule Fairness rules will now trigger for changes made to the previous day's shift and automatically update schedule and extra pay for the employee.

Schedule Template

Schedule Template Start Date Matches Schedule Settings Cycle Date

The Schedule Template start date will now match the Schedule Settings **Cycle Start Date** so that managers can easily control the dates to match Schedule Template import file dates.

Feature Retirements

The following table describes functionality that is planned to be retired.

Planned Retirements

Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Schedule Table View and **Schedule Overview By Date Range**	**Team > Schedule > Schedules** **Team > Schedule > Schedule Overview**	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. You will not be able to bring multiple schedules into one view.	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. 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.	Next release cycle: June 14th to July 29th.

General

Employee Profile: Single/Multi View Toggle

A **Single-Column View** toggle has been added inside employee profiles. Switching the toggle on will re-order the widgets in a single column. Switching it off will return the page to a Multi-Column view. This will not affect the Jump To panel on the left.

Adjust Size Capability in Employee Profile

Employee Profile users can now change the default width and/or height of their widgets in the Multi-Column view, allowing them to see what is most important to them. An icon has been added to the top right of all widgets where user can select the **Adjust Size** option, allowing them to increase/decrease the width and height of widget.

The **Tile Width** option is read-only when the one column view breakpoint is used for the Multi-Column layout. The available width adjustments are as follows:

- In a 1 column layout of the Multi-Column view, a widget can only have 100% width.
- In a 2 column layout, the widget can have 50% and 100% width.
- In a 3 column layout, the widget can have 33.33%, 66.66% and 100% width.

If a user increases/decreases the height of a widget, the change is also applied to the same widgets in that row. If a user increases the width of widget to be full width, the widgets previously on the same row drop to the next row.

The changes made are applied to the Employee Profile, My Profile, and Applicant Profile.

Dashboards

Dashboard Improvements

Within the Dashboard Layout Configuration page, spacing in the grid has been improved to reduce white spaces.

Admins adding custom tabs and then selecting **Apply** will add the tab(s) to the layout. Selecting **Save** on the configuration page will push the custom tabs to the Dashboard Tab Library. Using the **Apply** option will not push the tabs to the library. This only affects Admins. It does not affect users who are allowed to edit their own dashboards.

Admins using the **Reset Changes** button in the **Dashboard Layout Configuration** page will now receive a confirmation message stating, "*Are you sure you want to reset your layout to its last saved state?*"

Admins working in the **Dashboard Layout Configuration** page will now have options available at the top of every section. This minimizes the number of clicks by having to access the options through the ellipses menu. The following will be available:

- **List View** (middle section only)- Widgets/tiles occupy their own row and span the entire width of the section.
- **Matrix Review** (middle section only)- Widgets/tiles are displayed with their last set positioning and size.
- **Re-Arrange Tiles**- Exposes the rearrange panel for changing the order of widgets/tiles.

- **Remove Section**- Clears all widgets/tiles from the section and returns it to a blank state.
- **+Add** - Provides access for adding widgets, report/chart tiles, and content widgets.

Within the **Dashboard Tab Library** report page, new audit type columns have been added to view who and when actions were performed. The columns added are:

- **Created By** - Provides the full name of the user who created a tab.
- **Modified By**- Provides the full name of the user who last modified a tab.
- **Last Modified**- The date and time when a tab was last modified.

In the **Dashboard Layout Profiles** report page, a new icon/column is available to **View Accounts Associated w/Profile**. When selected, a report page displays showing all accounts with that profile. From that page you can access employee profiles and quick links.

- Created By (User First and Last Name)
- Modified By (User First and Last Name)
- Last Modified (mm/dd/yyyy, data format depends on locale)

In the Dashboard Tab Library, when creating a new tab, the option to **Assign** is available. This allows you to add the new tab to multiple profiles at the same time. The option will not be available for HR functionality of Onboarding, Pre-Boarding, or First Day Package).

For Content Widgets created in transparent view, the ellipsis menu containing **Adjust Size**, **Move To**, and **Remove** options will be available when the page is put into Edit Mode.

Users are now able to see **Open Links** from the Dashboard Tiles titles in a new tab using right click. When a user right-clicks on any Dashboard Tile with a link in the title and chooses **Open Link in New Tab**, the respective link opens in a new tab.

The word "Schedules" has been changed to **Layouts** in the following places:

- The **Layouts** section on the Edit Dashboard Layout Profile page.
- The **Profiles** lookup on the Dashboard Tab Library report.
- The **Profiles** lookup on the Edit Tab page.

The Description of Layouts appears in the Assign to Profiles lookup.

Dashboard Layout Profiles

Type Column Removed from Dashboard Layout Profile Report

The **Type** column is no longer included in the Dashboard Layout Profile Report (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles*) with the introduction of the Dashboard Tab Library. **Type** information has also been removed from the Edit Dashboard Layout Profile page.

Remove Reset Option for Schedules of Dashboard Layout Profile

Users with View and Edit permissions to the Dashboard Layout Profile report can now **Reset Changes** from the Dashboard Layout Configuration page (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles*, **Edit** from the **Layouts (Schedules)** for the appropriate profile). The

Reset option has been removed from the Layouts (Schedules) report on the Edit Dashboard Layout page.

Edit Tab from the Dashboard Layout Configuration Page

Users can edit a tab via the Dashboard Layout Configuration page (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles*, then click **View/Edit** for a layout (schedule)) so that all changes are saved to the Dashboard Tab Library. When the Dashboard Layout Configuration with tabs is presented on the page, an informational message displays at the top of every tab layout.

"*{Tab Name} is shared with # dashboard layout profile(s).*"

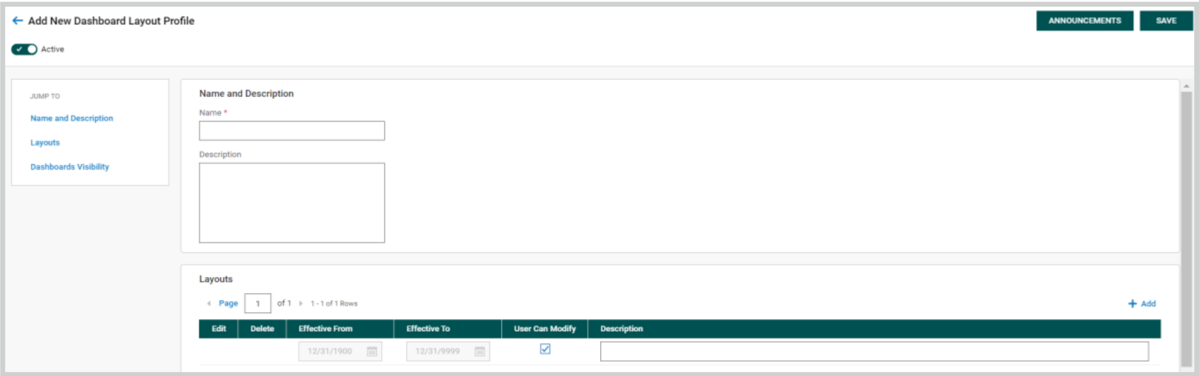
The informational message contains the number of profiles the tab is assigned to.

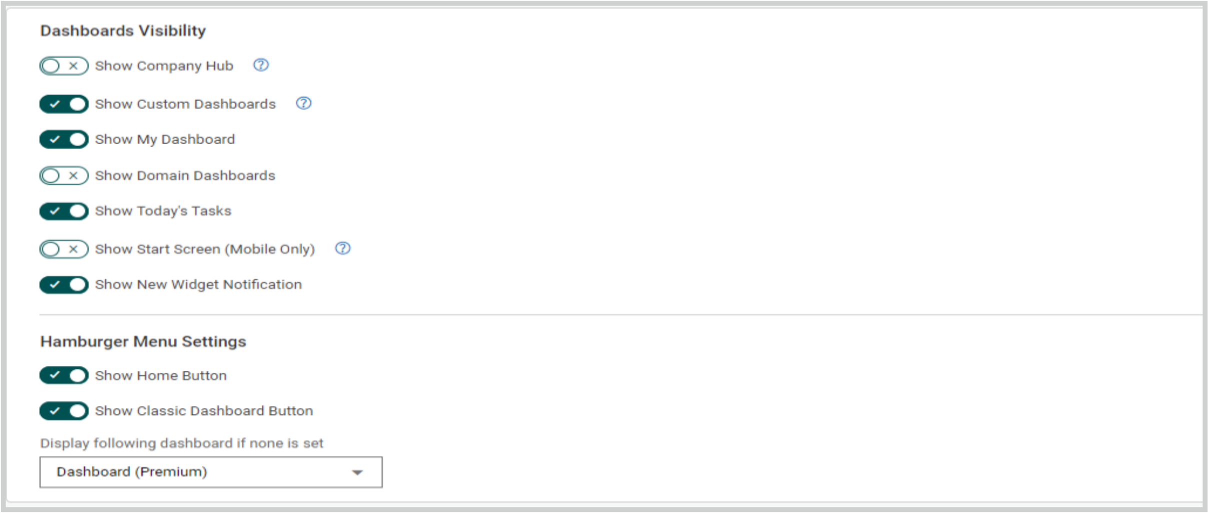
By clicking the link in the message, the Profiles pop-up is opened. Upon clicking **Save**, a confirmation pop-up shows on the page explaining that the changes will be applied to the Dashboard Tab Library pages. By clicking **Save**, all changes on tabs are saved both in the profile and in the library.

Updates on the Edit Dashboard Layout Profile Page

Users with View/Edit permissions to Dashboard Layout Profiles now see a better structure of the Edit Dashboard Layout Profile page, making it more convenient to work on.

- The "Schedules" section is now located under the **Name and Description** section, and has been renamed **Layouts**.
- The columns in the **Layouts** section have been rearranged in the following way:
  - Edit
  - Delete
  - Effective From (date field)
  - Effective To (date field)
  - User Can Modify (checkbox)
  - Description (input field, 255 characters limit)
- Tooltips have been added to the **Show Company Hub** and **Show Custom Dashboards** options in Dashboards Visibility.





Publish Changes from the Dashboard Layout Configuration Page

Admins can now push changes to employees from the Dashboard Layout Configuration page (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles*, then click **View/Edit** for the appropriate Layout (Schedule) so they can view relevant information on their Dashboard. A new option, **Publish Changes**, is available at the top right side of the page.

Save must be selected to enable the **Publish Changes** option. When an admin clicks **Publish Changes**, the system shows a confirmation dialogue where the user can choose **OK** to continue or **Cancel** to close the pop-up. The verbiage reads:

Publish Changes?

You are about to publish changes for the layout associated with accounts assigned to {DLP name}. Do you want to continue?

The changes are then published to the employees the profile is assigned to.

If one or more Company Hub tabs are blank, the system disables the **Publish Changes** button and shows the following inline warning message:

One or more of your Company Hub tabs are completely blank: Name of company hub tab #1, Name of company hub tab #2, etc. Publish is disabled until the tab(s) contain(s) at least one widget and/or content widget.

> **Important:** The system does **not** show the **Publish Changes** button for Layouts with past and future Effective Dates.

Creating Other Layouts in Dashboard Layout Profile

Second and subsequent Dashboard Layouts reuse all tabs that exist in the first Layout (Schedule) so the Dashboard Tab Library does not contain duplicates. When the Company Hub and Dashboard Tab Library are enabled for a company, users with View, Edit and Add permissions for the Dashboard Layout Profile item in their security profile can navigate to an existing or create a new Dashboard Layout Profile. Within the profile, users can click on an existing Layout (Schedule) or add a Layout (Schedule) using the

+Add option. When a user creates the next Layout (Schedule), the system reuses all tabs that were created for the last created Layout (Schedule) in this profile.

Dashboard – Widgets

New Widget Notification for the Checklist Widget

For consistency with the release of other new Dashboard widgets, a pop-up notification has been created to announce the addition of the Checklist widget. This new widget pop-up notification displays to users with a Dashboard Profile assigned, and only displays once. Users can add the Checklist widget to their Dashboard directly from the pop-up, and can specify the Dashboard to which the widget should be added.

Managing Client Content Widgets

Content Widgets – Paste in Text Editor

Admin Content Managers can now paste formatted text into the Text Editor. When the User clicks/presses the **Paste** button or right-clicks in the Content area, then selects the **Paste** option or simply uses the Ctrl + V action via the keyboard, the copied text from a Word Document is pasted with formatting.

When the Paste as a text button is active, or the user right-clicks in the Content area and selects the Paste as a plain text option, then the copied text from a Word Document is pasted as plain text without formatting.

Most formatting items such as bold, italic, underline, table, headings, symbols, etc. are supported except for the following items:

• Indented text

• Double spacing

• Shapes, Smart Text, Clipart, images, charts, Word Art

> **Note:** The Paste as a plain text option is not supported by IE and Mozilla browsers. Also, currently the Paste button is not supported by browsers other than IE (for example, Chrome, Mozilla, Opera and etc.). A warning message displays reading: *Whoops! Your browser doesn't support Paste action in the Text Editor. Please use the Ctrl + V (MacOS: Cmd+V) keyboard shortcut instead.*

Content Widgets - Auto-Size Checkbox Enhancements

Admin Content managers can now view mask lines in the Text Editor component for inserted tables. Within the Create/Edit Content Widget pop-up (*Company Settings > Profiles/Policies > Dashboard Layout Profiles > Content Widget Library > Create new Content Widget* or **Edit** an existing one), the following updates have been made:

The Auto-size height checkbox option has been moved to the top, between the **Content** section and the Text Editor.

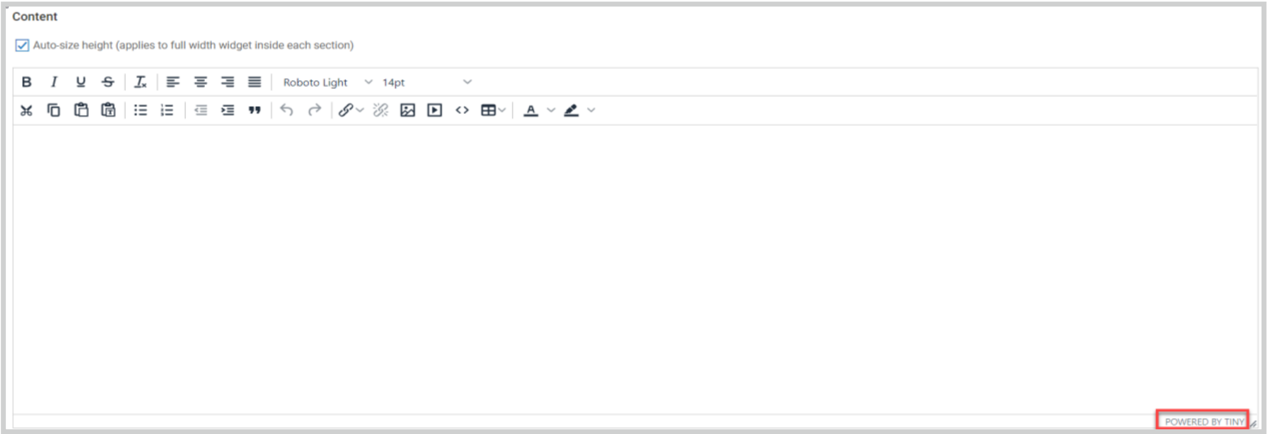
The Auto-size height checkbox option is renamed to **Auto-size height (applies to full width widget inside each section)**.

When the Add / Edit Image pop-up is opened, users can see updated labels in Image Size, such as:

- Fit is updated to **Fit (100%)**
- Small is updated to **Small (25%)**
- Medium is updated to **Medium (50%)**
- Large is updated to **Large (75%)**

Content Widget - Rich Text Editor Updates

Content managers with access to the Text Editor can now see the TinyMCE licensing in the bottom right-hand corner of the Text Editor. When the Text Editor is open, a **POWERED BY TINY** link displays that directs users to the **tiny.cloud** website.



Content Widget - Rich Text Editor: Linking Video Files

Admin Content Managers can now see an inline information message in case a linked video/video file is not supported. Users able to access the Text Editor can open the Insert/Edit media pop-up to view an informational message that reads: *Not all sourced video URLs are currently supported, you can only insert links to videos hosted via YouTube, Vimeo, and Dailymotion*.

When a URL is not inserted or videos other than those hosted by YouTube, Vimeo, and Dailymotion are inserted, the **Save** button is disabled.

Dashboard Tab Library

Dashboard Tab Library Report

A new Dashboard Tab Library report is now available under *Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*. Users can see a list of existing Dashboard tabs so they can manage them in one place. The Dashboard Tab Library report includes columns such as:

- Checkbox
- View/Edit
- Delete
- Clone
- Name
- Description
- Type (Custom Tab or Company Hub Tab)

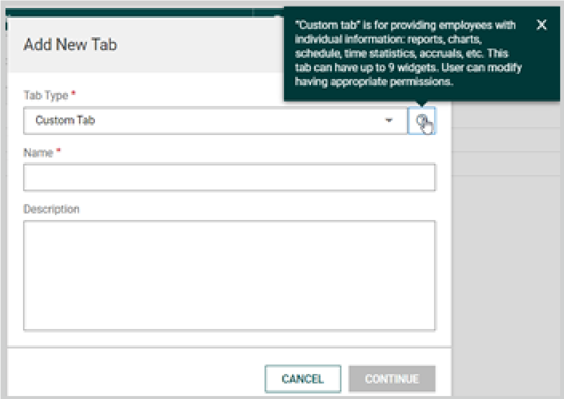
- View Profiles Associated With
- Created

All tabs that are created in the Layouts (Schedules) of Dashboard Layout Profiles are included in this report.

Custom Tab Added to Dashboard Tab Library

Users can now create new Custom tabs in the tabs library so they can assign it to several Dashboard Layout Profiles. Users with View, Edit, and Add permissions to the Dashboard Layout Profile report can select the **Add New** option on the Dashboard Tab Library report to add a new tab.

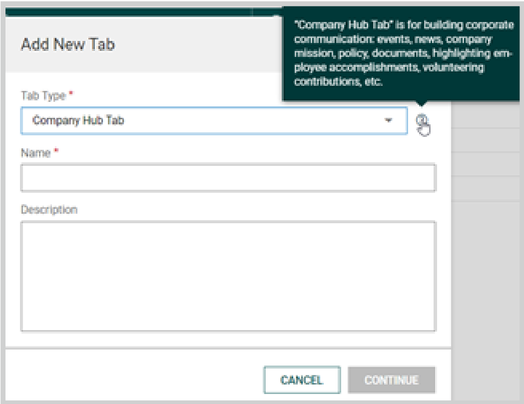
Users must choose the appropriate Tab Type, such as Custom Tab. A question mark (disabled when the Tab Type field is empty) next to the drop-down offers additional information about the selected type.



Users should input a Name and Description for the new tab. Once complete, the Dashboard Tab page appears upon clicking **Continue**. Users can then configure the tab by adding reports, charts, widgets, etc. Users are also presented with the options to **Save** and **Reset Changes**.

Company Hub Tab Added to the Dashboard Tab Library

Users with View, Edit and Add permissions to the Dashboard Layout Profile report can create new Company Hub tabs in the Dashboard Tab Library so they can assign it to several Dashboard Layout Profiles.

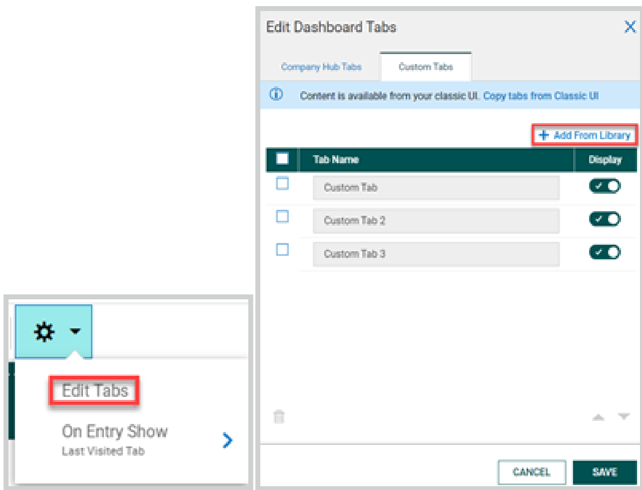


Under *Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library* (or by clicking **View Dashboard Tab Library** in the Dashboard Layout Profiles report), users can click the **Add New** option and then select Company Hub Tab in the Tab Type drop-down. Users must enter a Name for the new tab, and they can also enter a description. Clicking **Continue** takes users to the Dashboard Tab page where they can configure the new tab by adding available widgets. Users are also presented with the options to **Save** and **Reset Changes**.

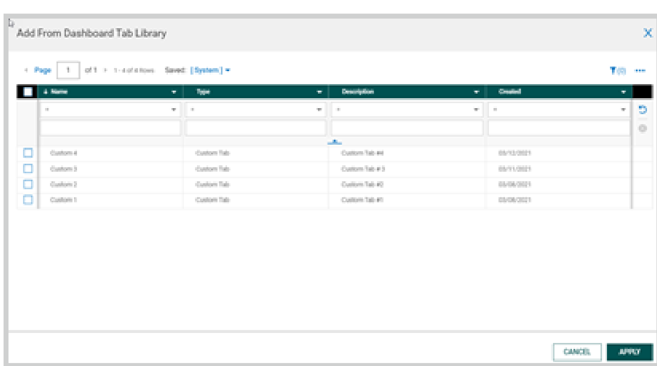
A grid displays allowing users to add sections and items on the Dashboard Layout. When **Save** is selected, the new tab appears in the Dashboard Tab Library.

Add Tab from Dashboard Tab Library in Dashboard Layout Profile

Users with View and Edit permissions to the Dashboard Layout Profile report can add a tab from the Dashboard Tab Library to the Layout (Schedule) of a Dashboard Layout Profile so they can chose from existing tabs. The Gear icon is available in the header of a Dashboard (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles*, **Edit** for the appropriate Layout (Schedule)) to Edit Tabs.



When the Edit Dashboard Tab pop-up is presented on the page after clicking **Edit Tabs** from the Gear icon, an **Add From Library** button displays and is available on both Company Hub Tabs and Custom Tabs. By clicking the **Add From Library** option, a report-based lookup entitled **Add From Dashboard Tab Library** opens with options pulled from the Dashboard Tab Library report (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*).



This lookup is filtered depending on which tab of the pop-up it has been opened from, Custom Tabs or Company Hub Tabs. After clicking **Apply** in the lookup, the user is returned to the **Edit Tabs** pop-up. By clicking **Save** in the **Edit Dashboard Tab** pop-up, the selected tab(s) appear on the Dashboard.

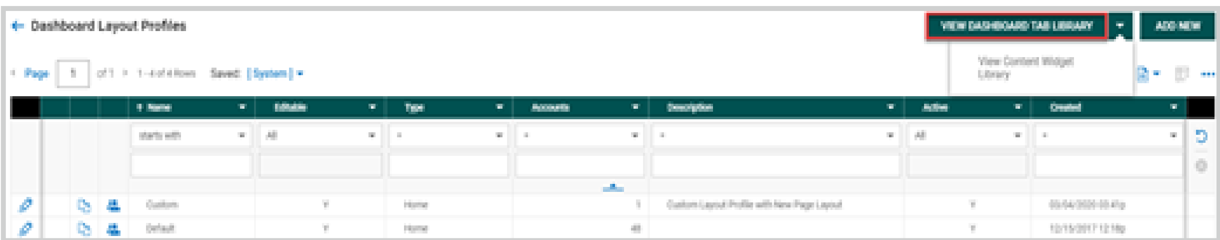
Users cannot rename added tabs. If a user deletes tabs in the **Edit Tabs** pop-up, they are only removed from the Dashboard Layout Profile, not from the Dashboard Tab Library.

Existing Tabs Migrated to Dashboard Tab Library

Users with View and Edit permissions to the Dashboard Layout Profile report can now see previously created tabs in the Layouts (Schedules) of Dashboard Layout Profiles so they can Edit them and assign them to other profiles. All existing tabs from the Dashboard Layout Profiles have been migrated to the Dashboard Tab Library (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*).

View Dashboard Tab Library from Dashboard Layout Profiles Report

Users can view the Dashboard Tab Library from the Dashboard Layout Profiles report (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles*) so that I can see the list of existing tabs. By clicking the **View Dashboard Tab Library** option, users are redirected to the Dashboard Tab Library report. Users can also choose **View Content Widget Library** to go to the Content Widget Library.



View/Edit Dashboard Tab from Dashboard Tab Library

Users with View and Edit permissions to the Dashboard Layout Profile report can view and edit Dashboard tabs in the Dashboard Tab Library report (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library* or click the **View Dashboard Tab Library** in the Dashboard Layout Profiles report) so they can assign it to several Dashboard Layout Profiles.

Once the user clicks View/Edit Tab for an existing tab, the Dashboard Tab page appears where the user can re-configure the tab when the Edit Mode is enabled. By clicking **Save**, all changes are applied to the associated Dashboard Layout Profiles automatically.

Edit Tab Name and Description

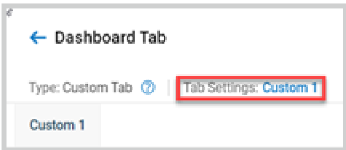
Users with View and Edit permissions to the Dashboard Layout Profile report can now rename tabs so they can assign a more informative name to it. Users can click **Add New Custom Tab** or **Add New Company Hub Tab**, or users can also click View/Edit Tab for an existing tab under *Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*.

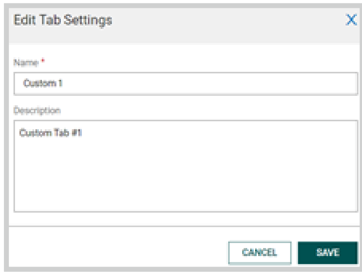
A **Tab Settings: {Tab Name}** option appears next to the Tab Type at the top of the page. By clicking the {Tab Name} link, a pop-up with the following fields appears:

Name: This is a text field with information added while creating a tab. It is a required field with a maximum of 80 characters.

Description: This is a text field with information added while creating a tab. It is an optional field that can be left blank with a 255 character limit.

By clicking **Save** in the pop-up, the new name will appear in the Dashboard header. By clicking **Save** at the top of the page, the updated information will appear in the related columns of the Dashboard Tab Library report.





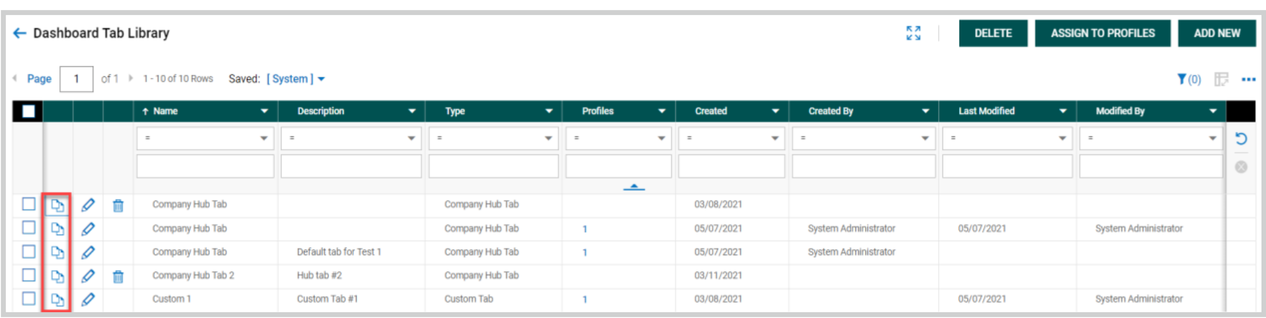
Delete Dashboard Tab from Tab Library

Users can now delete Dashboard tabs so that only relevant tabs are presented in the Dashboard Tab Library report (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*). A **Delete** column has been added to the report, and by clicking delete, users can confirm the deletion by selecting Delete in the pop-up. By clicking Delete in the pop-up, a success message that reads *'Tab Name' was successfully deleted* appears on the page and the selected tab is removed from the report.

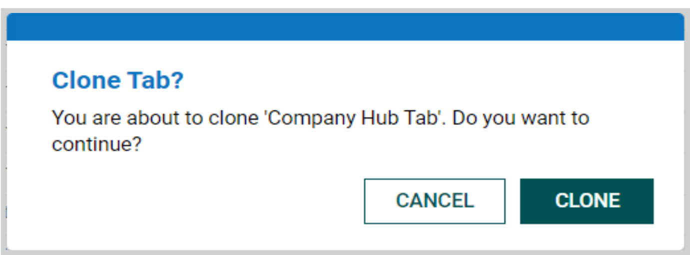
User cannot delete any tabs assigned to profiles, so the Delete icon is absent in the appropriate row.

Clone Dashboard Tab in Tab Library

Users can now Clone an existing tab in the Dashboard Tab Library so they can modify its initial state without affecting the original tab. Users can choose the **Clone Tab** option on the Dashboard Tab Library report (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*) to clone an existing tab.



Upon clicking **Clone Tab**, a confirmation message appears where users can confirm they want to clone the tab by selecting **Clone**.



When the user clicks **Clone** in the pop-up, the selected tab is cloned with the name *Copy of {tab title}*. Subsequent copies of the same tab are to contain indexation (for example, *Copy of {tab title}(1*), *Copy of {tab title}(2)*, etc.), and copied tabs are placed in alphabetical order in the report.

After confirming, a success inline message appears; *{Tab Title} was successfully cloned*.

Publish Changes Option for Individual Tab

Users can **Publish Changes** made to individual tabs for end users so the rest of the tabs are not affected. When a user navigates to the **Edit Tab** page in the Dashboard Tab Library, a **Publish Changes** button displays as a page level action and becomes available after a tab is created. The **Publish Changes** button becomes available only after clicking the **Save** button at the top of the page.

By clicking the **Publish Changes** button, all changes made on the tab are applied to end users who have the tab assigned to the active Layout (Schedule) in their Dashboard Layout Profile. The **Publish Changes** button becomes disabled if a tab is not assigned to any profile, and the following inline info message displays: *Publish is disabled, tab must be assigned to at least one Dashboard Layout Profile*.

When a Company Hub tab is blank, the system disables the **Publish Changes** button and shows the following warning message: *Company Hub tab is completely blank . Publish is disabled until the tab contains at least one widget and/or content widget*.

If the tab already exists, the content of the tab is reset/overwritten. If a user has deleted a tab and an Admin publishes it, the tab re-appears on the user's Dashboard with the latest data.

After clicking Publish Changes and OK to continue, a success message displays: *Dashboard layout(s) associated with [Name of tab] successfully received published changes*. The names of the associated Dashboard Layouts are shown on the subsequent lines of the message.

Mass Assign Dashboard Tabs

Users with View/Edit permissions to Dashboard Layout Profiles can now Mass Assign Dashboard tabs to Dashboard Layout Profiles using the **Assign To Profiles** option (*Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library*) so they can show one tab in multiple profiles simultaneously.

Employee Profile

Default View of Multi-Column View

Where users have not made any modifications to their Multi-Column view (i.e. expanded collapsed widgets or panels), the default views have been updated as follows:

The default view of the Multi-Column profile has been changed (applies to the Employee Profile, My Profile and Applicant Profile) so that now:

- The Jump To panel is collapsed.
- The Profiles panel (if configured) is collapsed.
- All widgets are opened.

The default view of the Single Column layout has been changed (applies to the Employee Profile, My Profile and Applicant Profile) so that now:

- The Jump To links are open.

- The Widgets are open.
- The Profile panel (if configured) is closed.

Once a user makes any configuration changes to their profile by opening or collapsing panels or widgets, that configuration is retained and the default view is no longer applied.

Employee Profile Adjust Size: Save User Configuration

Users can now configure their Employee Profile view with a mix of half and full width widgets and utilize that same view when returning to their profile. The **Adjust Size** configuration a user has made applies only to the Multi-Column view of the Employee Profile, and it is saved across sessions.

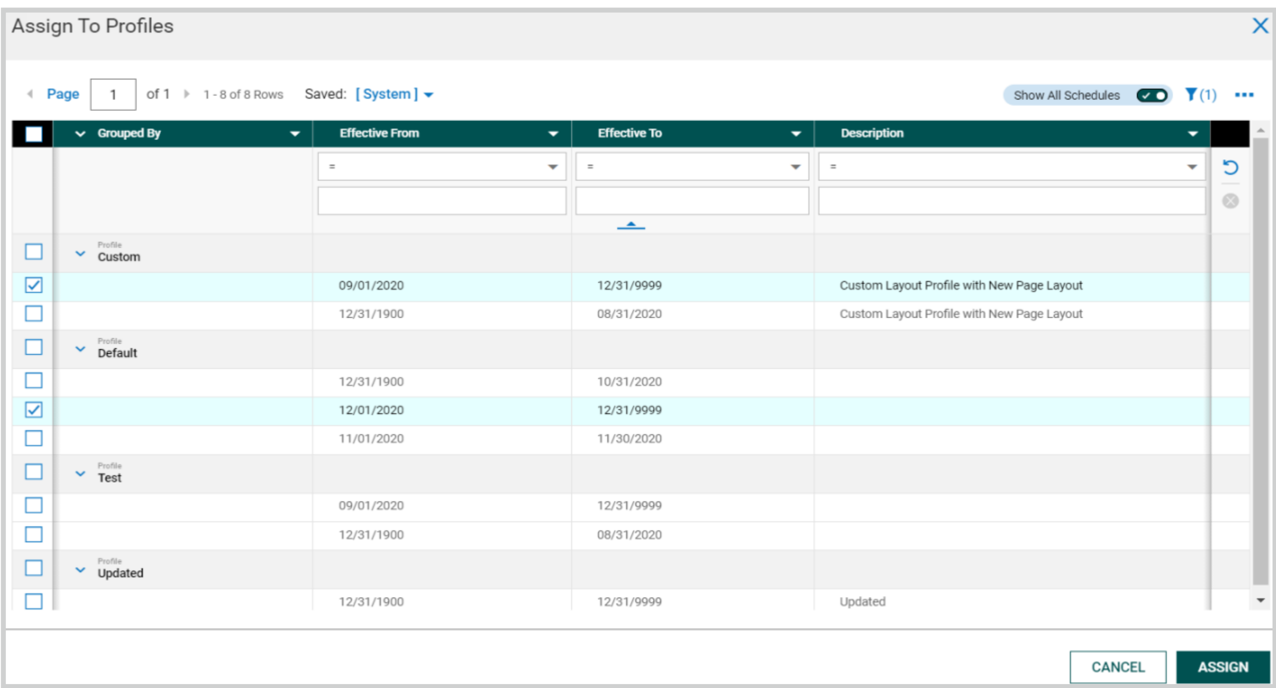
This applies to the Employee Profile, My Profile and Applicant Profile, however all views are considered different configurations. For example, if you configure the Personal Info widget to be full width in the Employee Profile, that does not mean the widget is also full width in My Profile.

General

Allow Multiple Alternate Managers

Previously, managers could delegate to only one manager at a time.

What's Changed: Under *Settings > Global Setup > Groups > Manager Group Access*, a manager now has the ability to assign up to five alternate managers who will have the same permissions as the original manager. They will also receive the same To-Do items.



By clicking the **Assign To Profiles** button, the **Assign To Profiles** lookup is opened. After choosing the appropriate profiles and clicking **Assign**, the selected tabs are assigned to the selected Layouts (Schedules) and a success message (*Dashboard Tabs were assigned successfully*) appears on the page.