Software Release Notes

OnePoint Human Capital Management

June 2020

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Human Resources

Supported Operating Systems and Browsers

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

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

Platform	OS Version
Desktop	
Windows	7, 10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

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

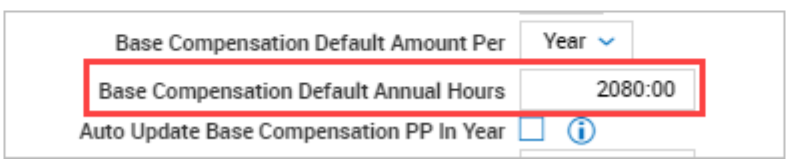
Base Compensation

New Company Setting to Customize Default Hours for Annual Base Compensation (Classic UI & New UI)

150211: A new Base Compensation Default Annual Hours field has been added to Company Setup. This field allows companies to set their own yearly hours for base compensation calculations. The default value will be the U.S. standard of 2080.00 hours but can be edited.

The default value automatically updates the Base Compensation record in employee accounts when hiring new employees. If the value is changed, existing employee records will not be updated.

The field is located in the *Account Policies* widget (typically under the *Global Policies* tab) of *Company Setup (Company Settings* > *Global Setup* > *Company Setup*.) This is also available for each EIN in multi EIN companies.



Benefits

Open Enrollment: Submitting Benefit Plans with Same Earnings/Deductions (Classic UI & New UI)

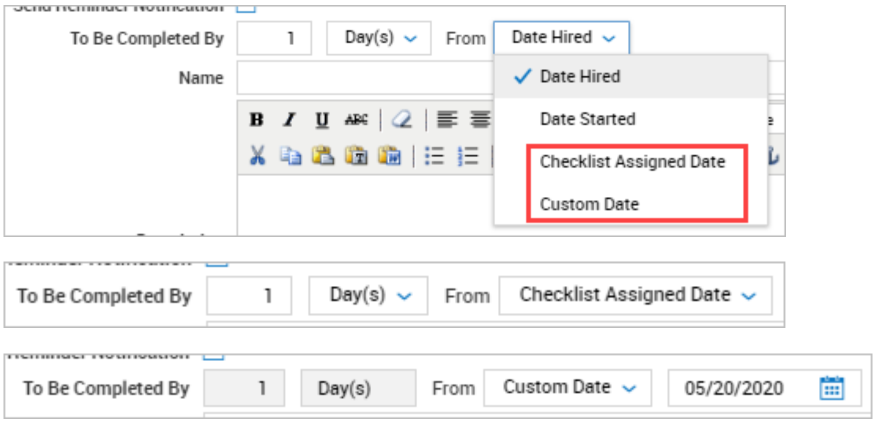
143137: Historically, employees were able to select and submit two benefit plans with the same deduction code via an Open Enrollment/Life Change Event. If a workflow was used in a Benefit profile, the manager received a To Do item on the Approve step but was not able to approve it.

To prevent this situation, we've added a validation that will prevent an employee from submitting a benefit change request that includes two elected plans with the same earning or deduction code.

Checklists

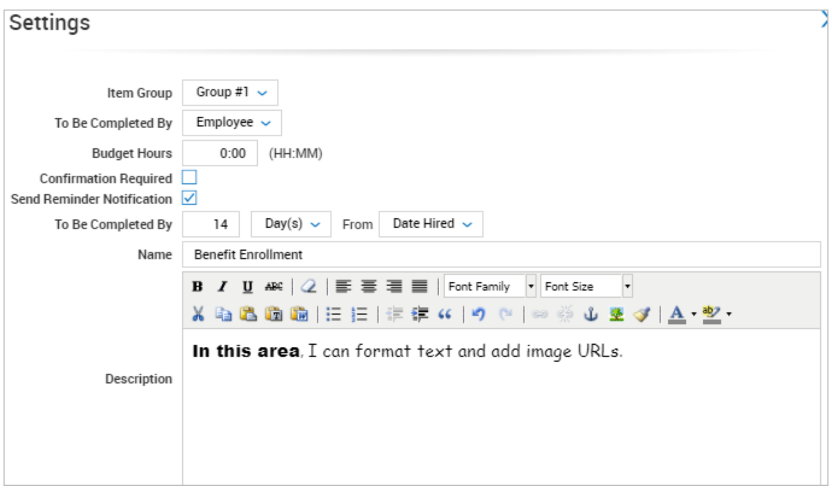
Checklist Assigned Date & Custom Date Added to Checklist Items (Classic UI & New UI)

163750 & 163751: A ***Checklist Assigned Date*** and ***Custom Date*** option have been added to the ***To Be Completed By*** anchor date of checklist items. When added, the date on which the checklist is assigned to the employee becomes the anchor date for completion of the checklist item. This date will impact the due date for the employee.



Rich Text Editor Added to Checklist Items Description Field (Classic UI & New UI)

163746: To assist administrators in creating Checklist Item descriptions, we have added a rich text editor where text can be formatted, and image URLs added.

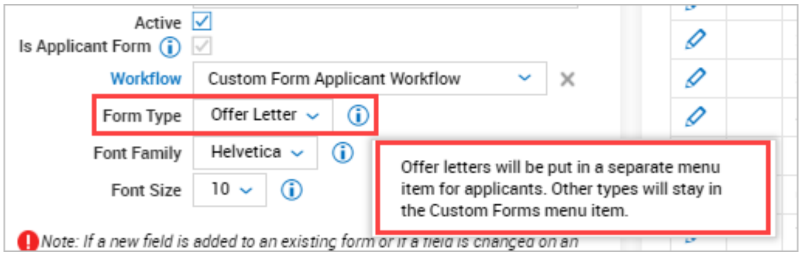


Custom Forms

Form Type Added to Custom Forms (Classic UI & New UI)

159682: A new ***Form Type*** drop-down has been added to Custom Forms configuration. In the drop-down, the option of *Offer Letter* is available when the custom form is set with *Is Applicant Form.* This option has been added specifically for applicant custom forms and when selected, it will place the custom form under a separate menu option and will provide an improved experience for the applicant. It will be under *My HR* > *Forms* > *Offer Letters* (vs appearing with all of the other custom forms under the Custom Forms menu item.)

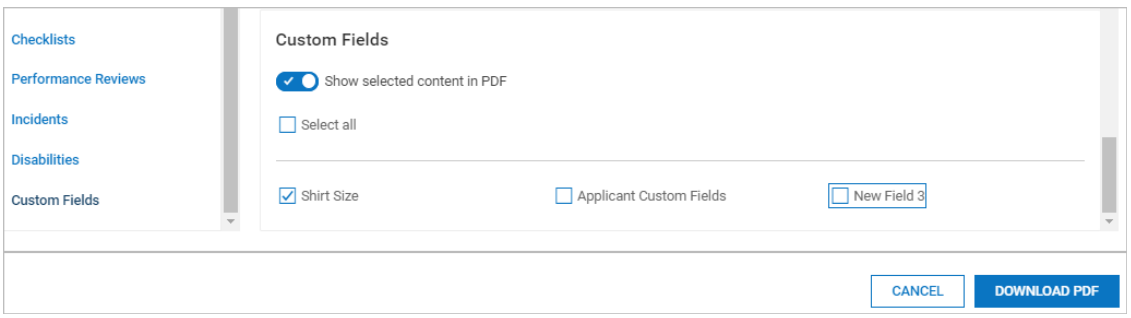
Since this new custom form type is only available for Applicant type custom forms, the *Is Applicant Form* checkbox will be enabled and grayed out when the *Form Type / Offer Letter* is selected.



Employee Profile

HR Custom Fields Included in Employee Profile PDF (Classic UI & New UI)

123086: All HR Custom Fields can now be included in the Employee Profile PDF when using the Download PDF button.



E-Quest

System Now Feeds DBA Name to Job Boards

163072: The feed sent from E-Quest Advantage was using the Default Company EIN's Legal Name, rather than the DBA name for the Company EIN (configured in the Job Requisition.) This made it difficult for potential applicants to find the job via different job boards since they were searching for the company name they knew, which was the DBA name rather than the EIN legal name. We have corrected the names fed to E-Quest as follows:

Single EIN

- DBA name if populated
- Legal Name if not populated
- If no Legal name use company name

Multi EIN

- Will check the EIN of the Requisition, then…
- DBA name if populated from the Requisition EIN
- Legal Name if not populated in the Requisition EIN
- If no Legal name use company name from the Requisition EIN

E-Signatures

Name Entry Unmasked for Users (Classic UI & New UI)

173844: In E-Signature fields where users type their name as their signature, the system now displays the characters as the user types. Previously, the system masked the characters typed into these fields as it does for passwords or other sensitive information.

Global Setup

Base Compensation Default Amount Added to Company EINs (Classic UI & New UI)

154530: Under *Company Settings > Global Setup > Company Setup* in the *Account Policies* widget, the *Base Compensation Default Amount Per* setting has the options of Year, Month, Week, Hour, or PP which will default this setting for new hire accounts for Base Compensation.

While this setting is available at the global level, it was not available at the EIN level for multi-EIN companies.

We have now added this to the global setup of Company EINs, located under *Company Settings > Global Setup > Company EINs*. This will allow you to configure different settings for different EINs.

Job Change Reason Code Requirement – Setting to Turn Off (Classic UI & New UI)

160356: Historically, when a user wanted to change the default HR Job for an employee, they were required to select a reason code before making the change and there was no way to turn off this requirement. In this release, we have added a global setting to allow this requirement to be turned off.

The ***Job Changes Require Reason Codes*** checkbox has been added to the *Account Policies* in *Company Setup* (*Company Settings > Global Setup > Company Setup*.) When unchecked, Job Change Reason Codes will not be required. The setting also contains a hyperlink to allow you to set up reason codes.

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Hiring

Auto Generation of Duplicate Usernames – Manual Hire (Classic UI & New UI)
168247: When manually hiring an employee via the *Hire* button or using an HR Action, and allowing the system to generate the username (as set in *Global Policies* in *Company Setup*), if there were duplicated formats, the system created a name made up of Empl(milliseconds); Empl1587409884062.

For example, Paul Smith and Phil Smith would be added as PSmith, which causes a duplication of usernames. Previously, the system would create the second name with the old format. In this release, it will now append a number to the duplicate name.

For Paul Smith and Phil Smith, the system will now generate a PSmith and a PSmith1. The system will validate against the following:

- Applicant usernames and applicant imports.
- Deleted and then undeleted employees.
- Editing of usernames via Hire, HR Action or API.

Auto Generation of Duplication Usernames – Importing New Hires (Classic UI & New UI)
170041: When importing new employees, if a username already exists within the system, a number will be appended to the username, so no errors are generated during the import or with duplicate usernames.

The following scenarios will generate number-appended usernames when running the Employees import:

- #1 - {First Name Initial} {Last Name} and a record already exists for this same value, the new username is appended with a number.
  - Example If Paul Smith is already in the system as PSmith, and Phil Smith is being imported, his User ID would become PSmith1.
- #2 - While the Employees import is being run, if the username format is set up as {First Name}{Last Name} and a record already exists for this same value, the new username is appended with a number.
  - Example If Paul Smith is already in the system as PaulSmith, and another Paul Smith is being imported, his User ID would become PaulSmith1.
- #3 - If the examples in #1 and #2 exist within the same import, the system will recognize this as well.
  - Example if Paul Smith and Phil Smith are in the same import, one ID would be PSmith and the other would be PSmith1.

Employees Import Template: Generate Username Format Tags Added (Classic UI & New UI)
168282: In the *Employees* import template, Username tags are available under *Generate Username Format*. Several were missing and have now been added.

- BirthMonth
- BirthYear
- SocialSecurityLast7
- SocialSecurityLast8

Additionally, on the *Instructions* tab, a note for ***Username*** stated:

- *Note: Our system can generate username based on template. (See Below). This field is REQUIRED for a new employee but is not required for updating existing employee records.*

The *Username* field is NOT required for new employees if *Generate Username Format* is configured in Global Policies. It will use the format specified in Global Policies. We have updated the note to read:

- *Note: Our system can generate username based on template. (See Below). This field is REQUIRED for a new employee when Generate Username Format is not specified in Global Settings but is not required for updating existing employee.*

Employees Import Template: Duplicate Usernames Supported (Classic UI & New UI)

2382: When importing a new employee using the Employees import template, if the chosen username already exists in the system, the username will be created and appended with a number.

Examples:

- #1 - The Employees import is being run and the username format is set up as {First Name Initial} {Last Name}. If Paul Smith is already in the system as PSmith, and Phil Smith is being imported, his user ID would become PSmith1.
- #2 - The Employees import is being run and the username format is set up as {First Name} {Last Name}. If Paul Smith is already in the system as PaulSmith, and another Paul Smith is being imported, his user ID would become PaulSmith1.
- #3 - If the examples in #1 and #2 exist within the same import, the system will recognize this as well. If Paul Smith and Phil Smith are in the same import, one ID would be PSmith and the other would be PSmith1.

Employees Import Template: Invalid Username Tags (Classic UI & New UI)

168280: When including a tag in the *Username* column of the *Employees* import template, and the value in the { } is not valid, the system will treat the entry as plain text and will auto-generate a new.

Previously, if you used {FirstNameInitial} {LastName1}, because the {LastName1} tag is considered invalid, the system would only import the first initial as a username. Judy Jones previously would have generated as J. Now, Judy Jones will generate as JJones1.

Position Management

FTE Field Expanded to 3 Decimals (Classic UI & New UI)

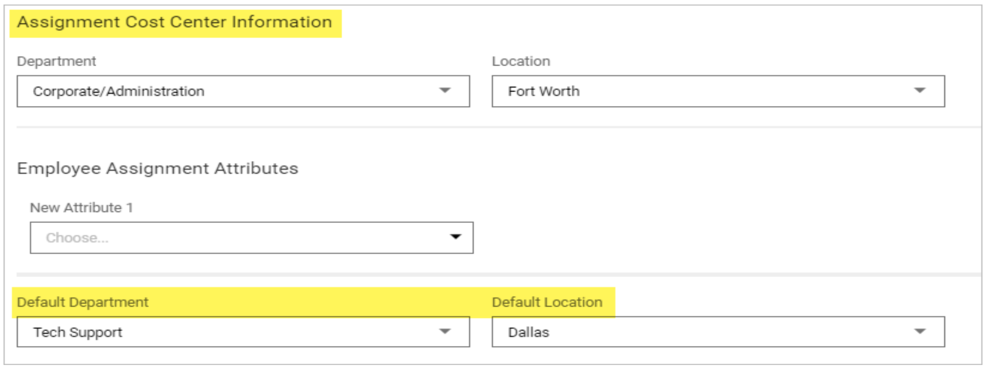
163856: The FTE field in Position Assignments has been expanded from 2 to 3 decimal places. The expanded field is valid in all areas of the application where this value can be added; this also includes imports.

Cost Centers Added to Regular HR Action Types for Non-Primary Assignments (New UI)

151653: The Cost Center fields available on a Position Assignment have been added to the Regular HR Action type. These are being added to accommodate non-primary position assignments where employees may be working in a different Cost Center than their Default Cost Center. (For example, I work in the Corporate Office normally so that is my Default Cost Center. One day a week, though, I work in the next town at one of our stores and that store is the Cost Center that is aligned with my Position assignment.)

When creating the Regular HR Action under *Teams* > *HR* > *HR Actions*, and then adding a *Position*, an ***Assignment Cost Center Information*** section will be added. This section is where you can change the cost center assignment. Note that Cost Centers entered under Assignment Cost Center Information will not be applied to the employee record – the Assignment Cost Centers are specific to that assignment for the individual.

If the HR action contains both the *Position* and any of the *Default Cost Center* action items, the values selected within the Default Cost Centers section of the HR Action is what will be applied to the employee record.



Assignment History Report Converted to New UI with Column Behavior Change (New UI)

165691 & 145062: The Assignment History report has been converted from the Classic UI to the New UI. In the New UI version, the *Rate Items* column will contain a hyperlinked count, and when clicked, will open a dialog box showing the non-primary assignment rates associated with the selected assignment. In the New UI, the report is located under *My Info* > *My Reports* > *System Reports* > *Audit Trail* > *Position Assignment History*.

Assignment History Report – New Column Added (New UI)

167393: A new ***Assignment Number*** column is available to be added to the *Assignment History* report and can be added via the Add/Remove functionality.

New UI: The report is located under *My Info* > *My Reports* > *System Reports* > *Audit Trail* > *Position Assignment History*.

SMS Integration with Twilio

iCal Attachment Displayed Before SMS in Notification Configuration (Classic UI & New UI)

134933: The iCalendar Attachment widget is now displayed at the bottom of notification/communication template configuration screens, providing a consistent experience when sending communication templates to Applicants.

The order of the widgets in a notification/communication template configuration is:

1. Email/Mailbox Message
2. SMS Message
3. iCalendar Attachment

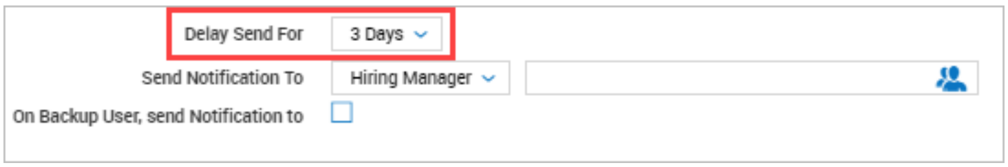
When communicating to Applicants, iCalendar is always listed last underneath all message bodies.

Workflows

Delay Send Option Added to Generate Notification Step in Workflows (Classic UI & New UI)

160028: In the *Generate Notification* step of workflows, a new ***Delay Send For*** option has been added, which will delay the sending of an email for 0-99 days. This only applies to users with a valid email address and does not affect Mailbox or SMS notifications (if enabled.) This applies to all workflows where a *Generate Notification* step is available; the exception being the *Timesheet* workflow, which has its own delay schedule options.

For HR Recruitment, the delay option is often needed for the *Hiring Stage Change Request* workflow. For example, if you have a workflow attached to a hiring stage where the candidate is rejected and you click the rejected hiring stage after the interview (since the candidate will not be considered), you may want to delay the notification to the applicant so they don't receive the rejection email moments after the interview.



Hiring Stage Change Request Workflows Delayed Emails Queue (Classic UI & New UI)

165857: A new *Delayed Emails* report is available where you can view the delayed emails from workflows that have been configured with the *Delay Send For* option. This report will show delayed workflow emails that have not yet been sent and will also allow for deletion of the emails, if needed. The report is located under *My Reports > System Reports > System Utilities > Delayed Emails*.

In the report page, you will see an information message: *Emails will be delivered as per UTC Timezone*. An overnight job runs to deliver emails according to the UTC Timezone.

Users should have the following security permission to view and/or delete entries in the report, i.e., user moves job application to incorrect hiring stage that triggers a delayed email notification, the user can access this report to delete it from sending if it has not yet sent.

- *Reports* tab, *System Reports* section – ***Delayed Emails*** (check to enable view and delete permission)

New UI Updates – Table of Functionality Added to New UI

The table below shows the updates made within the New UI and the functionality added.

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desktop	Mobile
144429 **157226** **157227** **165265** **163468**	HR	HR Benefit Plans	*My Info > My Benefits > Enrollment*	ESS Benefits Enrollment converted to New UI format Benefit Plans: Dependents/Beneficiaries widgets converted to New UI Benefit Plans: Account Contacts widget converted to New UI Editing a Benefit Plan via HR Action now supported in New UI (MSS)	Yes	Yes
158687	HR	E-Verify	*Team > HR > Forms > Government Forms > I9s*	***Add E-Verify Request*** button added to page for New UI Mobile.	Previously applied	Yes

New UI: Benefits

Redirect to EOI Provider Option Added to New UI

119313: The EOI functionality, *Redirect to EOI Provider* that is available in the Classic UI has now been converted to the New UI. The functionality provides employees using ESS for benefits enrollment a vendor link that will submit EOI information (as required by employer) to be sent to the vendor.

- The redirect option is available to employees during ESS benefits enrollment based on the *Redirect to EOI Provider* setting being enabled in the benefit plan EOI configuration.
- When the employee clicks the link, they will be redirected automatically.
- When the employee clicks the link, they will not lose their place in the enrollment process (for example, if the link is provided on the last tab, when the employee returns to WFR they will not have to start over from the first tab.)
- A checkbox for the employee to check, *I confirm the necessary EOI information was submitted to the provider* is available and employee cannot continue enrollment until the box is checked.

New UI: Employee Information

Termination Reason Column Added to Employee Information

1687: You can now add the Termination Reason column to the Employee Information report page. This column will show the Termination Reason of the most recent termination of the employee.

Having this column in the Employee Information report page assists companies who need information from both Employee Information and the Termination Details report page in one report.

External ID Field On Employee Record Open to Editing

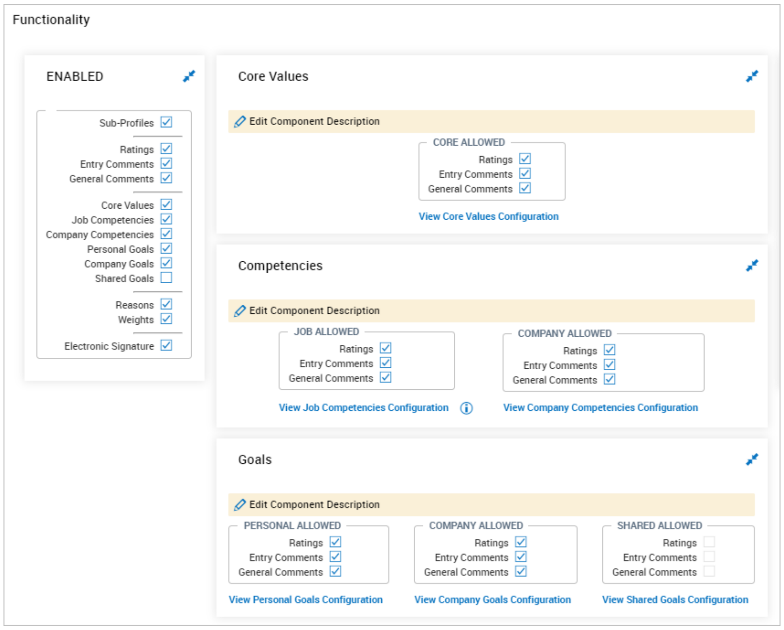
162071: The *External ID* field on employee records previously was only available and visible if it was populated via the *Employees* import; and once populated, it could not be changed. To allow companies more flexibility, we have added the *External ID* field to employee records, and it is now open to allow editing.

A new security item to control permission over this field has been added to the *Employee* section under the *HR* tab of security profiles. The permission will be set to empty or null. Options include *View* or *View/Edit*.

New UI: Performance

Functionality Widget in Performance Profiles Updated

160502: Within the *Functionality* widget of Performance Review Profiles, the new version of the widget will now be your default view. In previous releases, this widget had a checkbox to enable the new version of the profile. In this release, we will enable the new version of the profile behind the scenes and this checkbox will no longer display. The example below shows the new version. In the new version you will have edit capability and convenient hyperlinks that will take you to the configuration pages.



New UI Recruitment: Indeed Integration

Available in this release is the ability to set up and explore the new feature within Workforce Ready, giving you the opportunity to train your managers and prepare for the completed integration coming in mid-July. The enhancements and functionality for Workforce Ready are listed below.

NOTE: If you currently use Indeed today, don't worry, all of your existing jobs on Indeed will remain available to applicants and be ready to use via the new integration come July. First time Indeed user? Your jobs will be pushed out once the integration is complete in July. We will provide you with confirmation communication on this once it's complete.

Activating the Job Board Widget - Recruitment Module Configuration Page

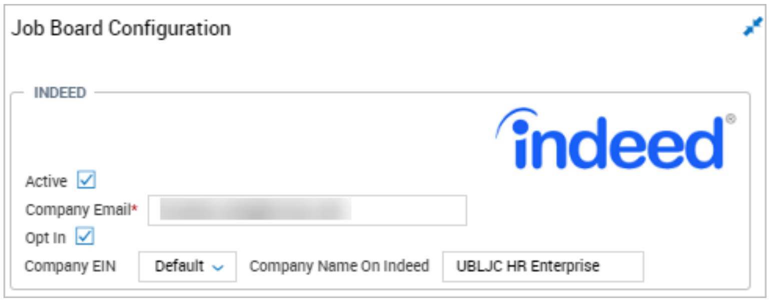
156281: A *Job Board Configuration* widget can be added to the *Configuration* page of the Recruitment module, located under *Company Settings* > *HR Setup* > *Applicant Tracking/Recruitment* > *Configuration*. Use the *Edit Tabs* option to add the widget.

Check the *Active* checkbox, enter the *Company Email*, and check the *Opt In* checkbox. In the *Company EIN* setting, select which company will be used. You will have the option to change the EIN name as it will appear on Indeed if your EIN name is not suitable or desired on their site.

NOTE: The EIN fields will not be included in the initial roll out of this functionality but will be added shortly after the release and will be ready for use by the mid-July integration completion.

After saving, all the existing job requisitions that fulfill the Indeed criteria will be automatically posted to Indeed job site. A success message will indicate the number of job requisitions sent over. A hyperlink for inactive jobs will be shown in the success message, and when clicked, will navigate the user to the report page of Inactive jobs.

- Inactive jobs are jobs that are not going to show up on the Indeed feed when Indeed is enabled. You will want to review these jobs and make any applicable changes to them so they can be sent over to Indeed. Job requisitions marked as Inactive occurs many times due to missing key criteria or the job has aged out. There is logic inside the system to explain what each individual job requisition is needing in order to have it pushed to Indeed via the XML.



Opt-In Checkbox

For Indeed, an **Opt In** checkbox is available and will opt in your company to having job content automatically delivered to Indeed and jobs posted on Indeed will include Indeed Apply.

What is Indeed Apply?

Indeed Apply is Indeed's easy, mobile-optimized process. When Indeed Apply appears below the job description of your job on Indeed, job seekers can easily use their Indeed resume to complete your application from any device, including mobile devices. Indeed Apply also supports screening questions ensuring the application from Indeed has the information required to make the best hiring decisions.

Opting in will present a Terms and Conditions pop-up you must electronically sign. It states:

When you opt-in to the Indeed Apply integration, external jobs created or updated in Kronos are automatically sent to Indeed using an electronic feed. This means that your most up-to-date jobs will not only be visible on your career portal but also in Indeed's free search results; These applicants will have the ability to answer the Questionnaire questions from the Job Requisition and they will receive the Job Application Disposition data from the Application Hiring stages plus Opt-in includes the mobile-optimized Indeed Apply application process, allowing you to receive up to 4X as many applicants per Indeed.

Terms, conditions, quality standards and usage limits apply.

- Initial opt-in for Indeed integration can take up to 10 business days to complete.
- All publicly facing job requisitions will automatically be posted to Indeed (providing all the fields are correct.) When opting in with Indeed, they require an all or nothing relationship, meaning all your jobs will be posted to their portal. You cannot opt to post only certain jobs. Job requisitions marked as Internal or Confidential will not be included in the XML feed sent to Indeed.
- The job requisitions are pushed to Indeed via a dedicated XML feed and it typically takes about 24-48 hours for the jobs to become active on Indeed.
- Job requisitions that are edited will also automatically post to Indeed when saved (providing all the fields are correct.)
- Job postings can be manually unposted from the Job Board widget of the requisition. Unposting deactivates the job so it is not available on the careers portal or on Indeed.
- When posted jobs reach or exceed their expiration date, or are manually closed, the job will be unposted from the job board and the status changed in the *Job Board* widget of the requisition.

- For job requisitions in *Posted* status, should a mandatory field set as required by Indeed be cleared by a user, an error message will display indicating the fields are required. Correct the error, save, and the job will go into the feed.

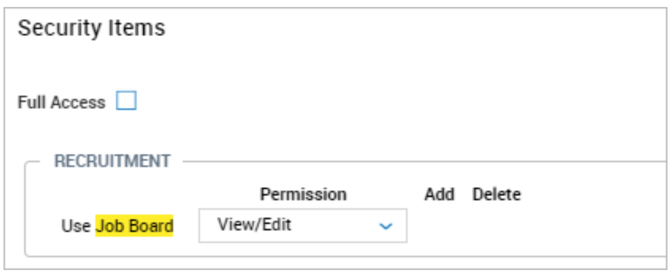
Unchecking the Opt In Checkbox

When unchecking **Opt In**, the *Terms and Conditions* pop-up will display again requiring your e-signature. Once this is signed, the system considers the company as opted out with Indeed.

- The text in the *Terms and Conditions* pop-up states: *Opting out still enables the automatic distribution of jobs to Indeed. Jobs created on this platform will be sent directly to Indeed through a dedicated XML feed. However, this feed will not allow for applicants to use Indeed to apply or have screener questions sent to Indeed; and will not allow for applicant data to be delivered to Indeed for review in Apply Details*.
- Job seekers can view the job on Indeed, but if they apply for a job they will be redirected to your company's applicant portal. The job application will be submitted and processed exclusively through our system.

Security Setting for Job Boards Widget

This setting must be enabled in user security profiles and will control access to the *Active* option on the *Configuration* page of the Recruitment module and will allow Post/Unpost/Status permissions in the Job Requisition *Job Board* widget.



The *Use Job Board* setting is located in the ***Recruitment*** section of the ***HR*** tab of security profiles.

- **View** – Users can only see the information on the *Job Board* widget as read-only. If users have access to the *Configuration* page in *Recruitment*, this setting allows read-only access to the *Job Board Configuration* widget.
- **View/Edit** – Allows users to Post or Unpost in the *Job Board* widget and edit the *Configuration* in *Recruitment*.

Job Board Widget in Job Requisitions

Indeed requires certain fields to be in the job requisitions before they can be successfully added to their portal.

- Typical information is Job Title, Description, Name, Email, Contact Information. Upon saving a job requisition, our system will prompt you with error messages if there are invalid fields.
- Once you correct the information and save, the job requisition will automatically be added to our dedicated XML queue and it will be added to Indeed, usually within 24-48 hours.

Once the *Job Board Configuration* is activated, a **Job Board** widget will be added to job requisitions. This widget is where you can view the status of Indeed job postings or Unpost/Post job requisitions.

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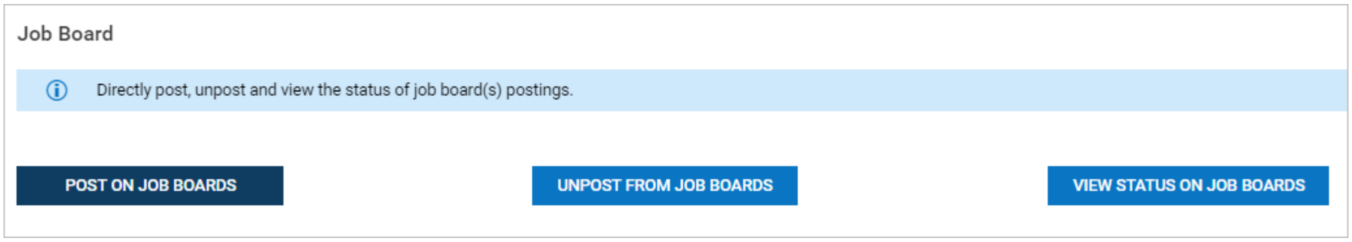
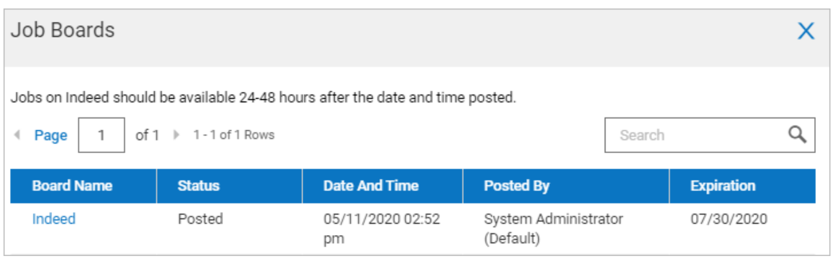


- **View Status On Job Boards** – Allows you to monitor when Job Requisitions were posted to Indeed and if they were unposted and/or posted again.
- **Unpost From Job Boards** – Allows you to remove a Job Requisition from Indeed and the career portal so it can be edited or closed.
- **Post On Job Boards** – Allows you to manually post a Job Requisition to Indeed. This is only necessary if you have manually unposted a job and then need to repost it again.

Viewing Status On Job Boards

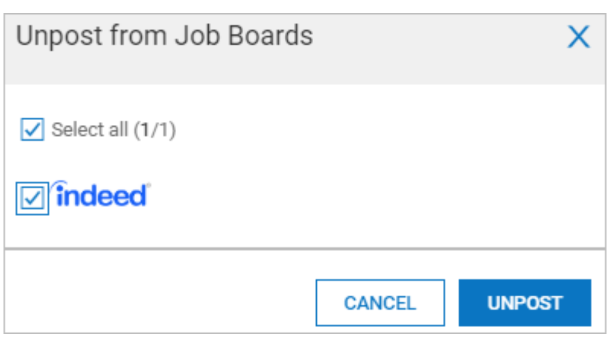
157261: Clicking the *View Status On Job Boards* button in the *Job Board* widget, will display a listing of the jobs posted. It will show the name of the board in which the job was posted, the posted status, date and time of the last action, who posted the job, and the expiration of the job.

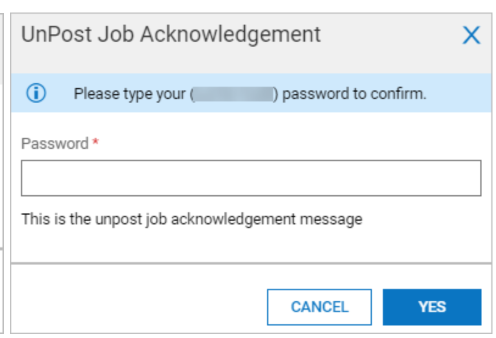
- If no *Visibility End Date* is entered in the requisition, Indeed will automatically set a 120-day expiration date from the Date/Time column.
- Clicking the hyperlinked *Board Name* will open that job board's website and will search for the company and job title to show the posting on the job board website.



Unposting From Job Boards

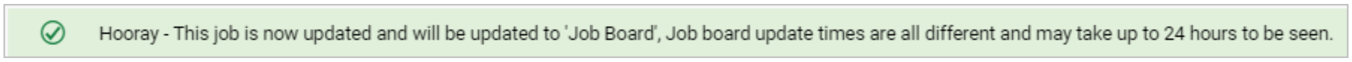
To Unpost a job requisition, check the *Indeed* checkbox and click *Unpost*. Enter your password on the *Unpost Job Acknowledgement* pop-up and click *Yes*. The job will be unposted from Indeed and the status will be updated from the *Job Boards* status page upon clicking the *View Status On Job Boards* button.





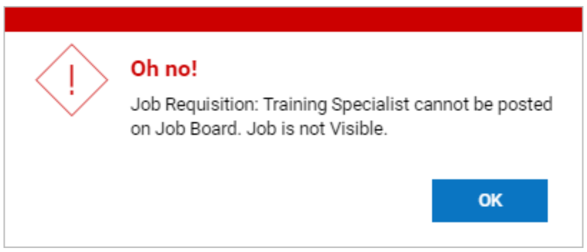
Posting On Job Boards

When a new or existing job requisition is created, or edited and then saved, and it has all of Indeed's required settings, the success message will indicate it was sent to the queue.



If this message is not displayed, the job did not get sent to the Indeed queue and instead you will see a *Saved* message only.

If you then manually use the *Post On Job Boards* button to post the job to Indeed, you will receive an error message stating what is wrong with the job requisition. i.e., a job that is not visible indicates the visibility dates are expired. Fix the error(s), save, and the job will post automatically.



Job requisitions can be manually posted after editing or unposting a job.

From the *Job Boards* widget, click the *Post On Job Boards* button. Check the Indeed checkbox and click *Post*. Enter your password on the *Post Job Acknowledgement* pop-up and click *Yes*. A success message will display when the job has been posted. If there is a problem with the job requisition, an error message will display explaining the problem.

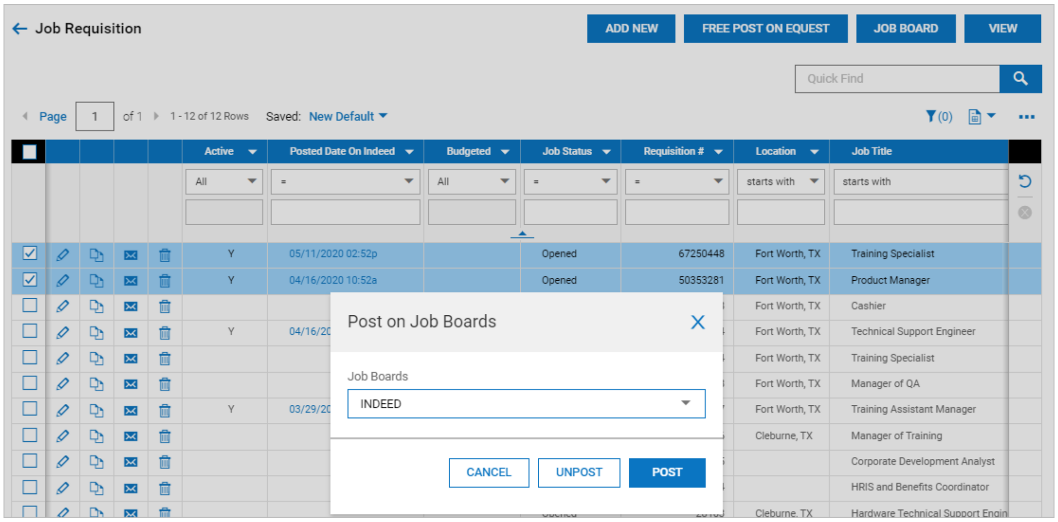
Users whose companies are Test or Demo companies are not permitted to post to jobs to the Indeed job site and will receive a warning message: *Your company status prevents you from posting to Indeed.* You can still process everything in One Point HCM, but it will not send the jobs to Indeed. (165965)

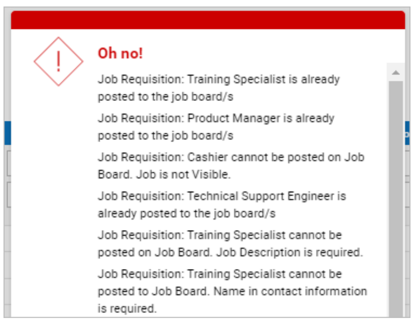
Job Requisitions Report Page

147267: The Job Requisitions report page, under *Team* > *Recruitment* > *Job Requisitions* will have the ***Posted Date On Indeed*** column available to be added.

The columns will have the date/time stamp value for the job posting. The date/time stamps can be clicked and will redirect you to the board, along with a filter that is based on that job title and location.

Bulk posting can be done from the Job Requisition report page. Multiple jobs can be selected and then posted or unposted by clicking the ***Job Board*** button and then selecting a job board and the *Post* or *Unpost* option.





Additional information about Indeed

153372: When a Job Requisition has been posted and then unposted from Indeed, doing so will cause the job to not be visible on the main applicant portal. This can also happen by disabling the visibility setting on the configuration page.

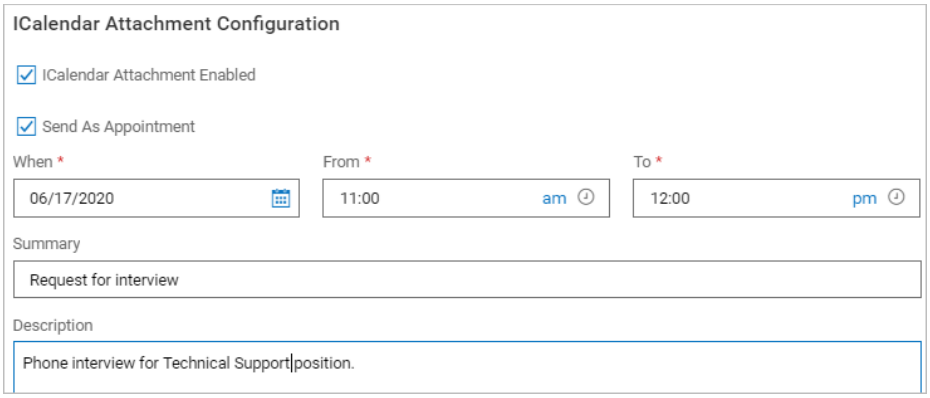
- If the job is subsequently re-posted to Indeed, or the job is made active again by clicking the visible button, the job will be visible and available on both Indeed and the applicant portal. Once enabled, you cannot have a job on the portal but not on Indeed.
- Applicants will be able to see the hiring stage status via Indeed. When an employer makes a change to an Application Hiring stage on an application that came from Indeed when you have Opted-In, we will transmit the stage to Indeed so the Applicant can see their updated stage. (153570)
- If Indeed is disabled, you can choose to reactivate any job but if Indeed is enabled it must meet the Indeed standards to be made active and the system will deactivate jobs that do not meet their standards. (155344)

New UI: Recruitment Updates

Applicant iCalendar Attachments now with Date/Time

We have now updated the *ICalendar Attachment Configuration* widget with a ***Send As Appointment*** option. When checked, date and time options will display allowing for the appointment time to be set. When the communication is sent, the applicant will receive an iCalendar attachment containing the appointment date and times.

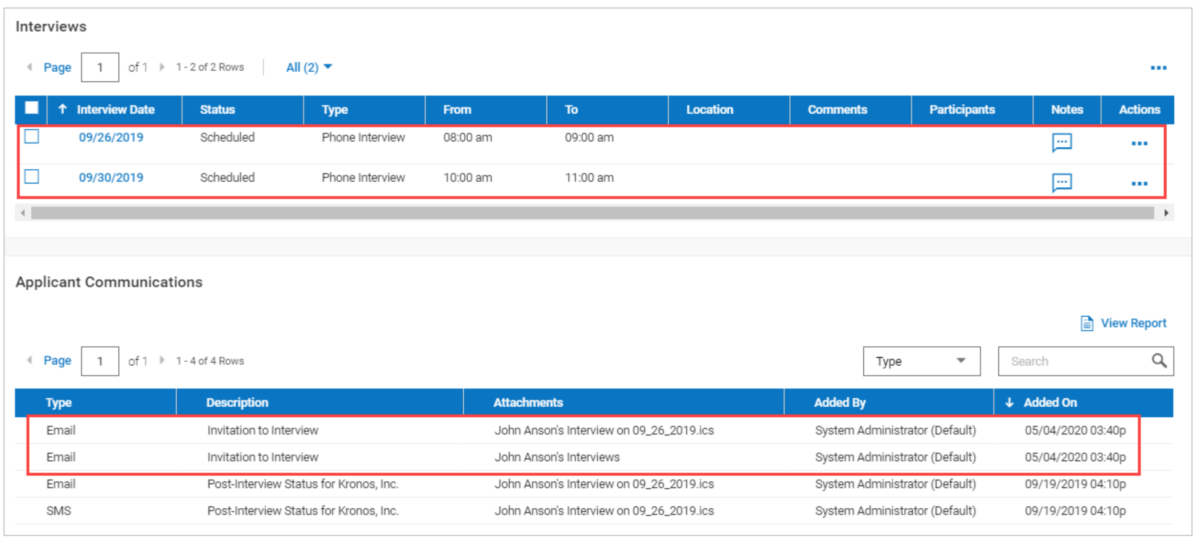
This is located under *Team > Recruitment > Candidates > Applicants*. Select an applicant. Click the *Communicate* button.



Applicant Communication – Multiple Messages

135489: The system will now support sending multiple interview email requests to applicants. Previously, if an applicant had multiple interviews listed, only the first interview in the list was delivered as an email message. This is managed under *Team > Recruitment > Candidates > Applicants*, in the *Interviews* and *Applicant Communications* widget under the *Communications* tab.

The *SMS Integration with Twilio* marketplace product is required to utilize this functionality.



Areas of Interest Added to Applicant Profiles

166498, 149048, 169510, 158768, 149048: Applicants applying through the careers portal will now be able to see and select their areas of interest if they are configured in your company (*Company Settings > Global Setup > Global List Definitions*).

- A widget for *Areas of Interest* will be added to the *Resume* tab of the applicant profile below the *Job Categories* section.
- The logged in applicant will be allowed to add/delete areas of interest in the given section.
- The applicant will be allowed to select areas of interest from the ones configured at the company level.
- Administrators will have a link available in the widget to configure Areas of Interest items.

Documents: Additional Documents Upload by Recruiters

165640 & 165638: In this release, we continue to build the ability for the upload of multiple applicant documents. Because applicants are unable to add, update or delete documents for a submitted and completed job application, we will now allow the recruiter this ability. For example, a recruiter may want to upload a resume, cover letter, license or certification.

Additional documents uploaded by applicants or recruiters will be visible in the *Applicant Document* widget on the applicant record. Applicants must complete the job application process for their attached documents to be available in the widget. Recruiters will retain the ability to upload documents for the applicant via the Add button in the widget.

All the documents associated with the job application will be displayed in the paper clip format at the top of the job application page. The recruiter will have the provision to download/upload/delete the documents using the supporting documents option. The total number of supporting documents associated with the job application will be displayed as a numeric value next to the paper clip icon.

Recruiters/users should have the following security permissions set in their security profile.

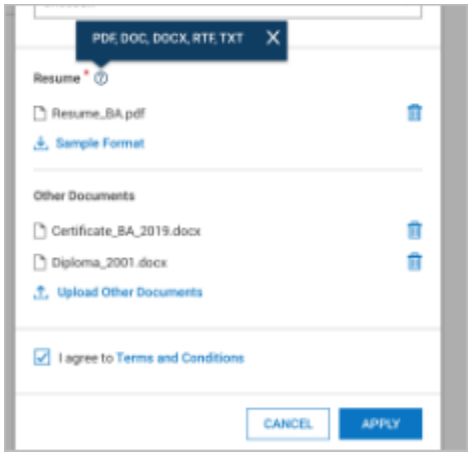
- **View/Download** of the documents - HR tab: *Documents*: *View*
- **Upload** of the documents - HR tab: *Documents*: *View/Edit* with *Add* checkbox checked
  -and-
  HR tab: *Job Applications*: *View/Edit*
- **Delete** of the documents - HR tab: *Documents*: *View/Edit* with *Delete* checkbox checked
  -and-
  HR tab: *Job Applications*: *View/Edit*

Documents: Multiple Document Uploads for Quick Apply Applicants

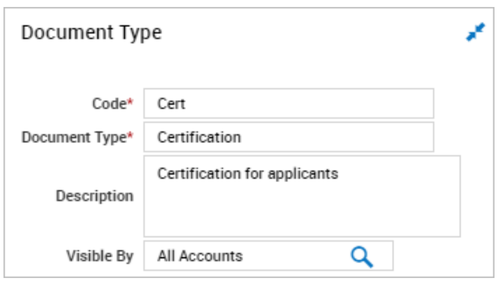
149766: In this release, we are expanding functionality for multiple document uploads via Quick Apply. Previously, only recruiters and hiring managers could upload multiple documents on behalf of applicants. Now applicants will be allowed to do this while applying for a job when using Quick Apply.

- On the *Quick Apply* pop-up, there will be a link to upload a resume and another link to upload one or more documents.
- The applicant will be allowed to upload a maximum of 20 documents per job.
- Once the applicant has completed the job application, applicants can download and view the documents but cannot add new ones or delete existing ones.
- Documents are stored at the job application level and recruiters can upload documents on behalf of the applicant at the applicant level. Recruiter or hiring manager can also access the uploaded documents in the Applicant Documents widget on the applicant's record.

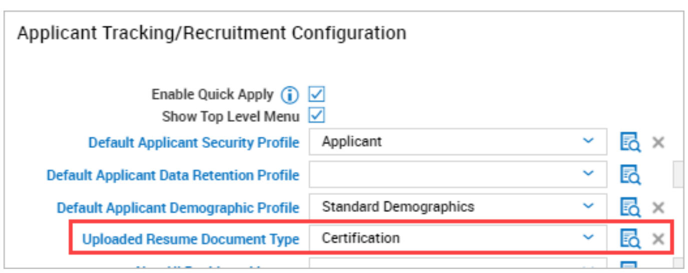
- Applicants are restricted from applying to the same job twice.
- Applicants reapplying for the same job who have not completed the job application and uploading of documents will be allowed to upload documents and complete the process.



In *Applicant Tracking/Recruitment Configuration*, you can select a document type which will be included in Job Requisitions and can then be marked as required. The document types uses existing Document Type functionality configured under *Company Settings > Global Setup > Global List Definitions*.



- The *Uploaded Resume Document Type* field is the document type the will be assigned to the document that is uploaded using the *Upload Resume* functionality.



- If a Document Type is marked as required at the job requisition level, the applicant will be required to choose this document type when uploading their documents. Applicants should be allowed visibility to the document type so they can see and select the required type. When creating Document Types, ensure applicants are inclusive in the *Visible By* field.

Documents: Multiple Document Uploads by Traditional Applicants in Applicant Profile

165641: Traditional applicants can upload multiple documents in their applicant profiles. These documents can include a resume, or other documents like a cover letter, license, certification and more.

The other documents uploaded while applying to a job requisition are visible to the applicant in the applicant portal.

When the applicant is logged in to their applicant account, they have access to their complete and incomplete job applications under the *My Applications* tab. Under the same tab, the applicant will now have access to other documents they uploaded while applying for the job application (similar to resume.) These will be available via the paper clip icon.

The resume is displayed as a link (for download) on the left, opposite to it on the right, the other documents will be displayed with the label *Other Documents* and a paper clip icon. The total number of supporting documents associated with the job application will be displayed as a numeric value next to the paper clip icon.

- When the applicant clicks the icon, they will be able to view and download all the documents.
- If the job application does not have a resume associated with it, these documents will be displayed on the left (in place of the resume).
- If no documents are submitted with the job application, the *Other Documents* section will be hidden.

Documents: Downloading Resumes from To Do Items

163450: The *Download Resume* link was moved to the left side when a resume is opened from the *View Resume* icon in the To Do item. This was done to match the placement of the *Download Resume* link when opened inside the Job Application screen. The resume is now also center aligned when opening from the To Do item.

Job Detail Pop Up Restricted to When Applicant Uses Invitation Link

161630: In the October 2019 release, functionality was introduced where a user can invite applicants to apply for open jobs by clicking *Notify Applicant* from the job requisition. This in turn sends the applicant a link where only the invited applicant can see and apply for that job using the link and their login credentials. A pop-up displays the details of the job upon clicking the link.

If the applicant uses the.careers URL and simply clicks *Apply For Job*, a pop-up will also appear with the job details. Because the job details are already on the web page, this creates a redundancy in presenting this information. The pop-up would also display when the applicant switched to or from their applicant profile.

To prevent this redundancy, this pop-up will only appear when the applicant uses the link from the *Notify Applicant* step to see/apply for the job.

Quick Apply: Password Requirement for Returning Applicants

168213: To secure and prevent others from accessing an applicant's incomplete application or questionnaire, and to validate the identity of returning applicants, we have added password requirements and validation for Quick Apply applicants.

Scenario 1: If the applicant completes the first Quick Apply screen and then leaves without completing the questionnaire, the applicant record is created but the job application is incomplete. If someone enters that user's email address, that person could access the application.

- Solution: Quick Apply applicants returning to an incomplete job application will be required to enter their password before showing the questionnaire. A message inside the pop-up will display: *You are about to resume the job application you started on mm/dd/yyyy. To complete this application, please enter your password.*

Scenario 2: The need to validate a returning Quick Apply applicant who wants to apply for a different job.

- Solution: Applicants who have previously created their applicant record (whether through Quick Apply or Traditional application process) must enter their password to complete application.
  - On the Quick Apply screen, the applicant will enter the required fields.
  - When the applicant clicks the Apply or Continue buttons, the system will do a validation to determine if the applicant already has an applicant record for the email address they entered.
  - If the applicant does have an applicant record for that email address, they will receive a pop-up message and a field to enter their password.

Recruitment Questionnaire Answers Report Updates (New UI only)

164620: Updates have been made in the New UI version of the Recruitment Questionnaire Answers report.

The report contains both the Job Application Questionnaire answers and Recruitment Evaluation Questionnaire answers and has the option to click the *View Job Application Questionnaire* icon which then opens the Job Application Questionnaire to view answers.

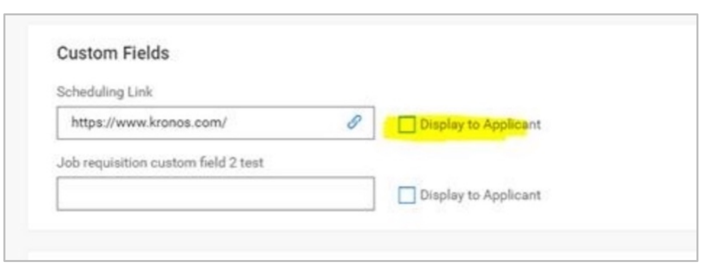
On rows where Questionnaire type is a Recruitment Evaluation Questionnaire, this icon will now open the Recruitment Evaluation Questionnaire to view those answers for those users with the appropriate permissions.

Additional updates include:

- The *View Job Application Questionnaire* button name changed to *View Questionnaire*
- If row contains a *Recruitment Evaluation Questionnaire* it will display as *Recruitment Evaluation Questionnaire* upon hovering over icon.
- If row contains a *Job Application Questionnaire*, it will display as *Job Application Questionnaire* upon hovering over icon (existing functionality.)
- The *Recruitment Evaluation Questionnaire*, when opened from the icon will contain a *Download PDF* button just as the Job Application Questionnaire does.
- The *Delete Applicant Questionnaire* name was changed to *Delete Questionnaire.*
- An option was added to delete a Recruitment Evaluation Questionnaire from the *Recruitment Questionnaire Answers* report (with proper security rights.)

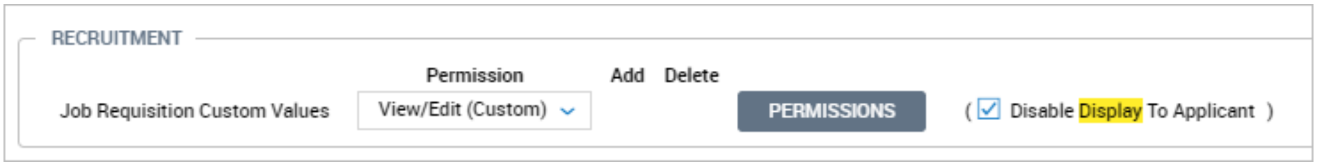
Security Setting Added to Prevent Job Req Info Displaying to Applicants

160029: Inside Job Requisitions, if custom fields are used for internal information only and should not be viewed by applicants, the *Display to Applicant* checkbox can be checked/unchecked as needed.



We have added a new security setting that allows the *Display to Applicant* checkbox to be grayed out to prevent accidental checking or unchecking in the job requisitions.

The setting is located in the *Recruitment* section of the *HR* tab of security profiles, a ***Disable Display To Applicant*** checkbox has been added to the existing *Job Requisition Custom Values* setting. When checked, the *Display to Applicant* checkbox in job requisitions will be grayed out.



System Account Field Removed from Job Application Type Questionnaire
162201: Previously, a ***System Account*** field could be added to the Job Application type questionnaire. Because this field could result in sensitive information able to be viewed outside your company, this configuration option will no longer be supported when creating new questionnaires. It will not affect existing questionnaires using this field. This applies to both Quick Apply and traditional applicants.

To Do Item When Assigning Recruitment Evaluation Questionnaire (Mobile)
166587: When assigning a Recruitment Evaluation Questionnaire to complete, a notification can be configured to let the assignee know a questionnaire has been assigned for them to complete. Previously, it was required that these users had to find the Job Application page, then find the application in the report page and click to open the questionnaire.

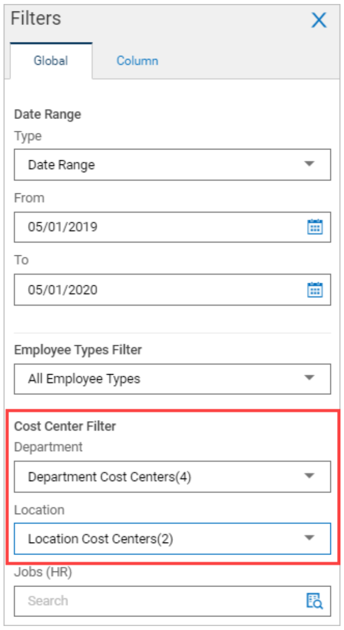
In this release we are adding functionality that will generate a To Do Item for the recipient when a questionnaire is assigned to them. In the To Do Item there will be a direct link to the questionnaire (*Start* button), and if the user has permission, a link to *View Resume* and *View Job Requisition* may also be present.

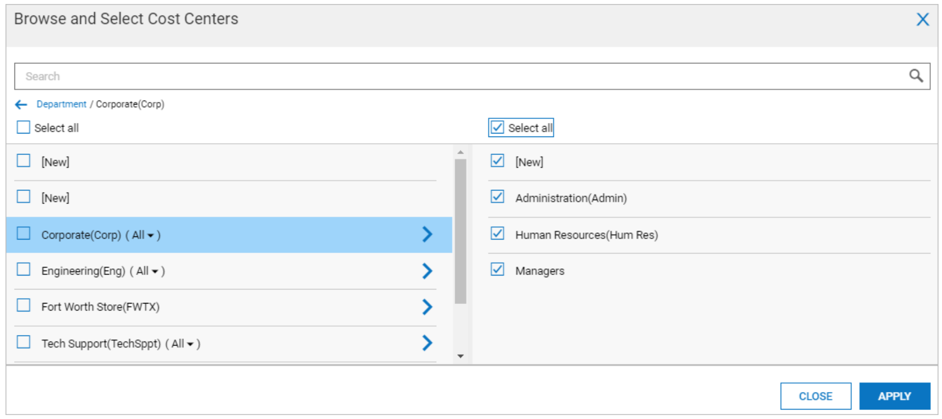
The To Do Item will stay in their list until it has been completed.

NOTE: This functionality was added to the New UI Desktop experience in the May 2020 release. We are now adding it to the New UI Mobile experience in this release.

Filters for Turnover Rates By Cost Center Report Updated
156437: The filtering for the *Turnover Rates By Cost Center* report has been updated so you can run it at varying levels of the cost center tree and include all levels below that one (i.e. subtree).

When you select the drop-down for the cost center and click *Browse*, you will be able to *Select All*, or check the level, and on each level be able to *Select All* for all sub-levels (which include subtrees of that level.) Or you can use the drop-down to select specific levels. The report will then include data for the levels selected.





Assets: Could not terminate an employee with assigned asset

166612: In the New UI, employees who have an asset assigned to them can be terminated through an HR Action. Previously, when a manager clicked Terminate for an employee who had an asset, the error *Assignment Solution is Required* displayed.

Job History: Job Change History showed incorrect effective date

171366 When users make a change to an employee's record, the record's *Job Change History* section displays the correct *Effective Date*, based on the time zone set in *Company Setup*. Previously, in this situation, time zones such as Pacific Standard Time sometimes saw an *Effective Date* that was the day after the change was actually made:

Performance Management: Review showed base comp to employee when it should not have been visible

144318: In the New UI, when an employee's performance review profile has the *Base Comp Visible* field set to *To Finalizer Only*, the employee does not see the *Base Compensation* field when viewing the performance review. Previously, *Base Compensation* was visible to the employee when it should not have been.

Performance Management: Some goals were not editable by employee

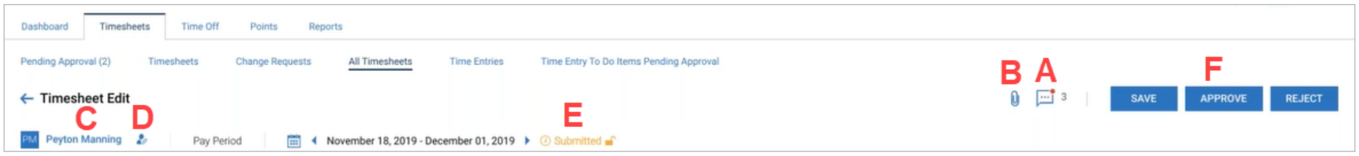
160686: In the New UI, on the *Performance Goals* page, if an employee added a goal for herself, that employee can edit the goal. If another person added the goal for the employee, the goal cannot be edited by the employee.

Performance Management: Back arrow didn’t work in Performance Reviews

163496: In the New UI, the system's Back arrow functions as expected in Performance Reviews. Previously, clicking the Back arrow only returned users to the current page.

New Timesheet Experience

Top of the Timesheet



A. All saved timesheet notes can be accessed from the *All Timesheet Notes* icon at the top of the timesheet. When you select the icon next to the date of the note within the *All Timesheet Notes* pop-up window, you will be navigated to the date and time entry associated with that note.

B. Next to the *All Timesheet Notes* icon, select the paperclip icon to attach a document to the timesheet. Any documents that are uploaded to the timesheet will be visible in the *All Timesheet Documents* report under *My Reports > Time Reports > Time Allocation*.

C. When viewing a single employee's timesheet, the employee's name will be displayed at the top left of the timesheet, and when you click on the name, you will be taken to the employee's profile.

D. Next to the employee's name is a *Quick Links* icon to access quick links for employee information, such as *Current Timesheet* and *Pay Statement Records History*.

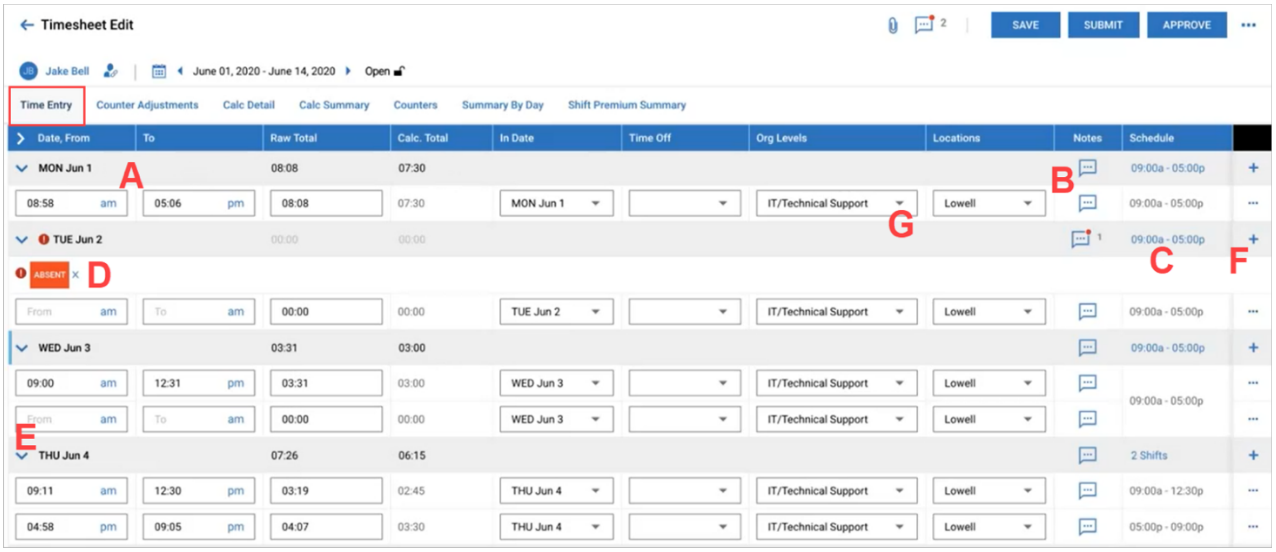
E. The approval status will display one of the following at the top of the timesheet based on the approval status: *Open, Submitted, Approved, Rejected, and Open (rejected).*

F. With the proper security settings, the *Save*, *Approve*, *Reject* and *Submit* buttons will display at the top-right of the timesheet. After the timesheet has been submitted, the *Submit* button will no longer display, and the *Reject* button will display.

   NOTE: When employees need to make modifications to their timesheet, the timesheet change request is available under all tabs of the timesheet.

Start/End (All Days) Timesheet Profile

Time Entry Tab



A. The time entry fields are now under the *Time Entry* tab, and display horizontally, from left to right. All data for a single time entry will be contained on one line, and all time entries within a day will be grouped under that day.

B. Submit comments via *Time Entry Notes* for a specific time entry or for the day via *Daily Notes.* A red dot will display next to the notes icon when a comment has been saved, along with the number of comments for that time entry.

C. If there is one scheduled shift, the shift time will be listed (i.e. 9AM – 5PM). If there are multiple shifts scheduled for a single day, X number of shifts will display under the *Schedule* column (i.e. 2 Shifts), and all the sets of scheduled times will show underneath.

   NOTE: The shifts populated under the *Schedule* column are the calculated schedules and will not generate until time entries are entered on the timesheet. When time entries are entered, the system will then associate those time entries with schedules.

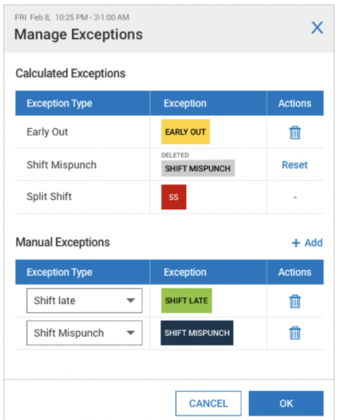
   - If you are in a Basic Scheduler company, you can have up to two shifts scheduled per day, and you will be able to edit the schedules from the schedule pop-up window in the timesheet.
   - If you are in an Advanced Scheduler company, you can have more than two shifts scheduled per day. If there are multiple shifts scheduled in one day, the schedule pop-up window will display the shift details, but you will not be able to edit the shift details from the timesheet, only from Scheduler.

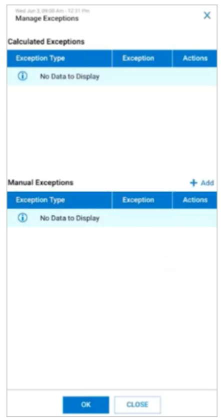
   To view and edit schedules, navigate to the Timesheet Profile and enable *Show Scheduled Shifts* within the *Time Allocation* widget. If the manager has view permissions, they will be able to view the schedule in the timesheet, but not make edits in the pop-up window. If the manager has view and edit permissions, they will be able to view and edit the schedule from the pop-up.

D. On the day line, a red exclamation mark will display if there is an exception for that day. Exceptions are tied to the scheduled shift, so the exception will display above the applicable time entry that is tied to that shift. If an exception is manually added, a red-letter *m* will display next to the exception.

   If the Timesheet Profile setting within the *Time Allocation* widget, *Show Exceptions*, is enabled, exceptions will be visible in the timesheet to managers and admins. Employees will be able to see the exceptions if the Timesheet Profile setting within the *Exceptions* section, *Show Exceptions To The Employee*, is enabled. If an exception is enabled and is *Editable*, but *Show Exceptions To The Employee* is not enabled, the exception will be visible to the employee on the *Calc. Detail* tab.

If *Editable* and *By Employee* are enabled in the timesheet, employees will have the capabilities to clear an exception. Managers can also clear exceptions. Once an exception is cleared, it will appear in the *Manual Exceptions* section (not on the timesheet) in the *Manage Exceptions* pop-up after the timesheet is saved. Employees can also delete the cleared exception. When deleted, the Pay Calc will recalculate the exceptions based on the rules configured. On the left below is an example of the *Manage Exceptions* pop-up in the New Desktop Experience. On the right is an example of the pop-up in the New Mobile App.





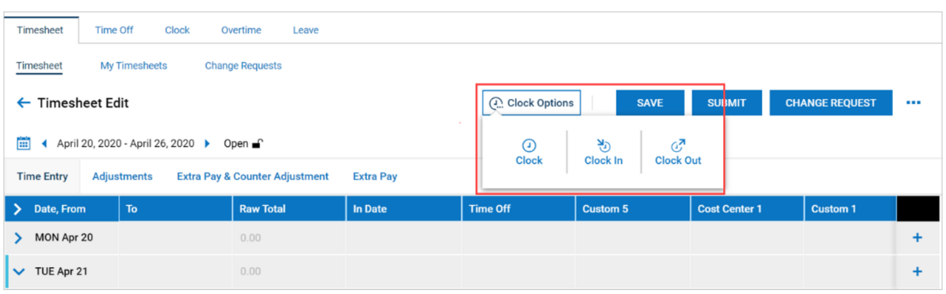
E. You have the option to collapse/expand a single day by selecting the arrow next to the day, clicking anywhere on the gray day line, or you can collapse/expand all days by selecting the arrow at the top of the timesheet next to *Date, From*. When collapsed, a high-level summary of the total hours for each day will display.

F. To add more time entry rows, select the plus sign icon at the end of the time entry line. To delete, select the three-dot ellipses icon at the end of the time entry line.

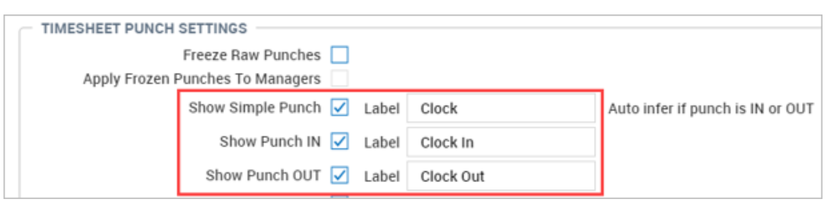
G. When selecting a choice from a drop-down, the look-up will display the most recent values, and you can search for the value you are looking for.

NOTE: This functionality is applicable for all timesheet tabs with drop-downs/selectors.

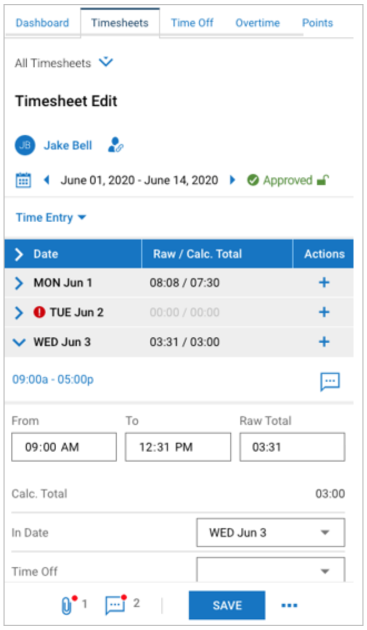
If configured, *Clock Options* will display from the top of the timesheet where users can submit a simple punch (IN/OUT).



Under the timesheet profile within the *Timesheet Punch Settings* widget, you can enable which actions will display, and you can edit the label.

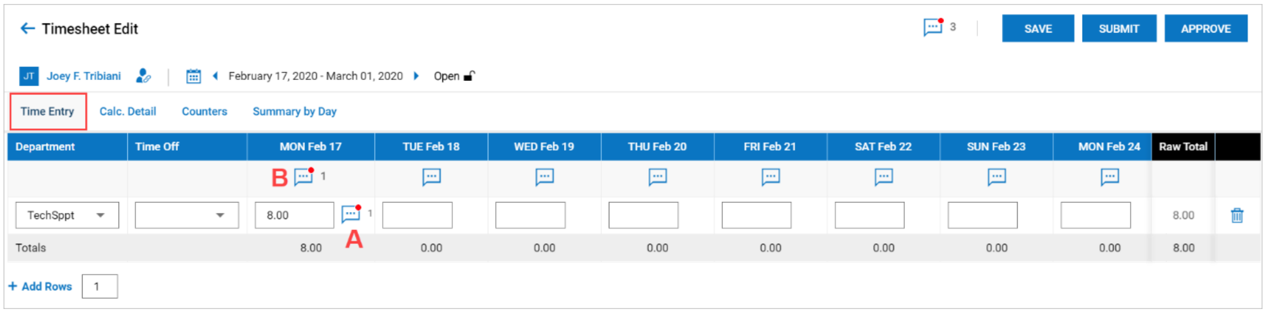


Below is an example of the *Start/End (All Days)* Timesheet Profile *Time Entry* tab in the New Mobile App.



Bulk Hours Timesheet Profile

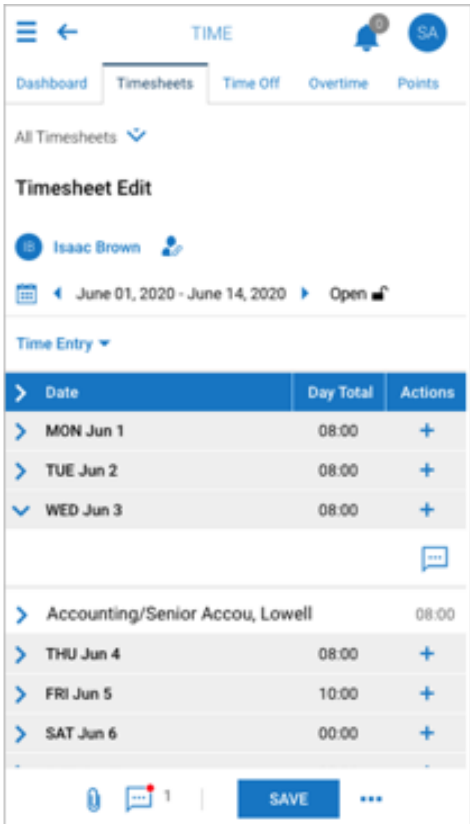
Time Entry Tab



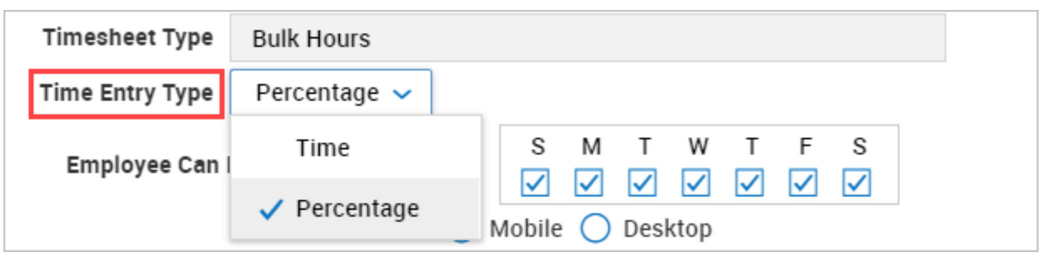
A. *The Time Entry Notes* is available next to the time entry field.

B. *Daily Notes* is on the day line.

Below is an example of the *Bulk Hours* Timesheet Profile *Time Entry* tab in the New Mobile App.



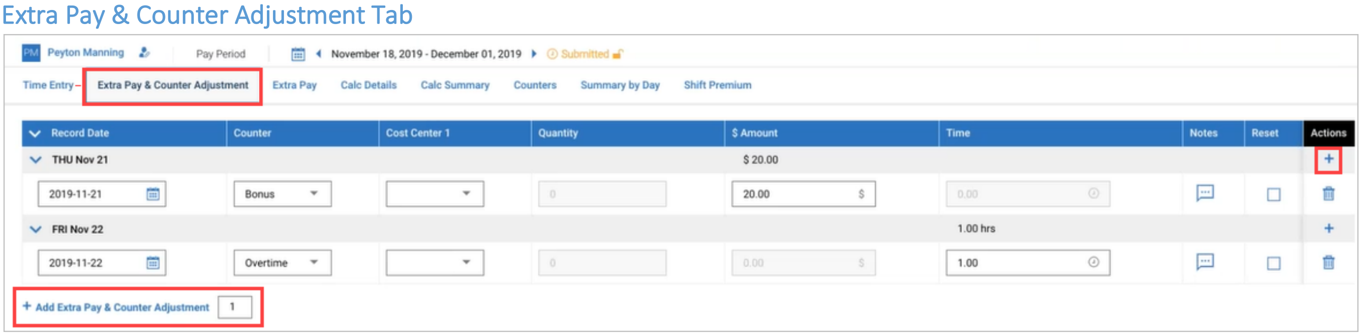
For Bulk Hours timesheet profiles, you have the option to submit time entries as a percentage, and the system will convert the percentage to a time value. In the *Timesheet Settings* section, select *Percentage* from the *Time Entry Type* field.



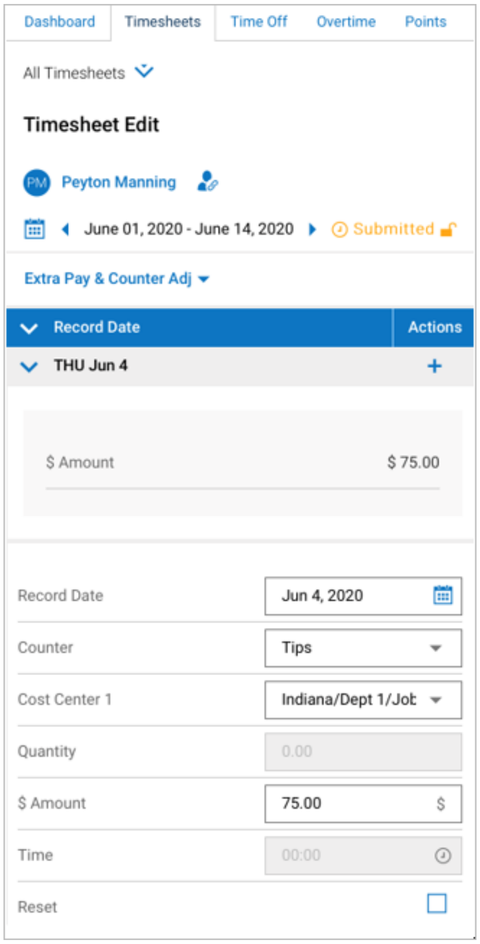
Additional Timesheet Tabs

The following timesheet tabs are available in *Start/End (All Days)* and *Bulk Hours* timesheet profiles:

Extra Pay & Counter Adjustment Tab

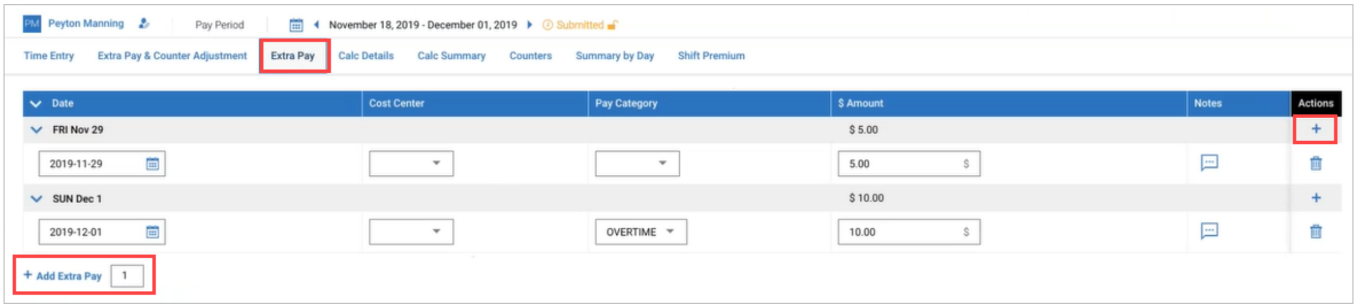


Below is an example of the *Extra Pay & Counter Adjustment* tab in the New Mobile App.

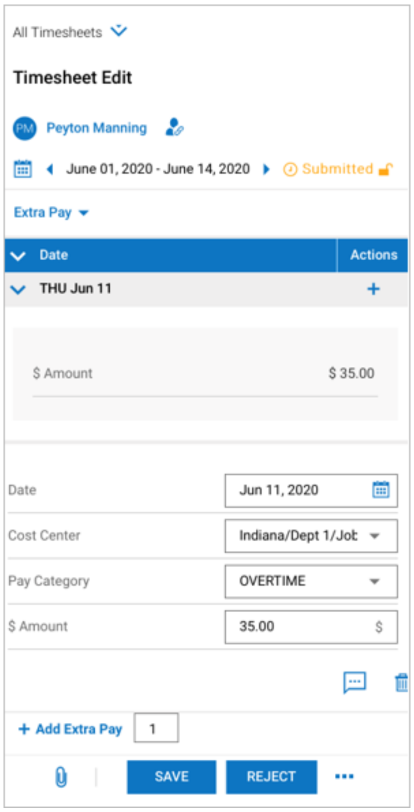


To add adjustment entries, select + *Add Extra Pay & Counter Adjustment*. You can add multiple adjustments to a single day by selecting the plus sign next to the date, which will add adjustments for that day in a group.

Extra Pay Tab



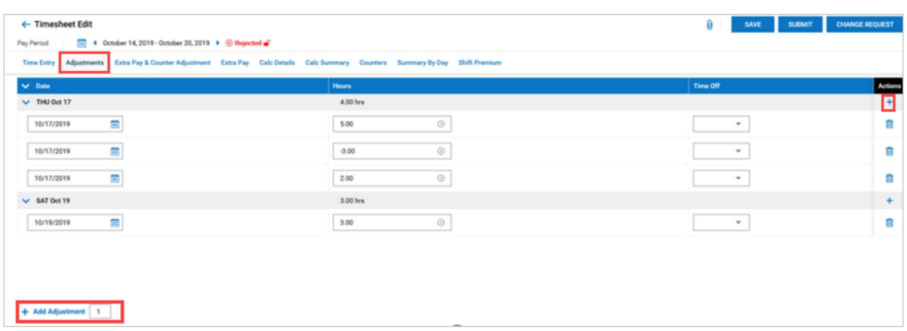
Below is an example of the *Extra Pay* tab in the New Mobile App.



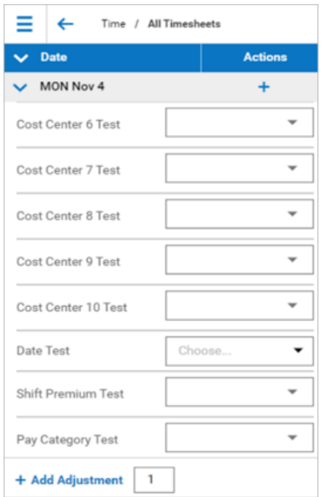
Like the *Extra Pay & Counter Adjustment* tab, you can add extra pay adjustment entries, and group multiple entries for one day.

Adjustments Tab

Below is an example of the *Adjustments* tab in the New Desktop Experience.

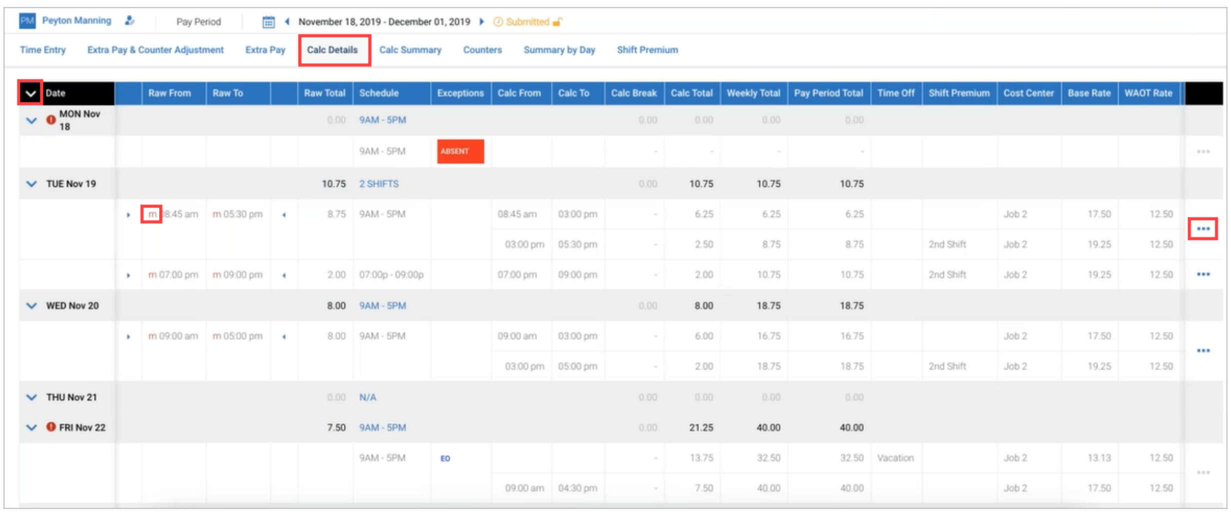


Below is an example of the *Adjustments* tab in the New Mobile App.

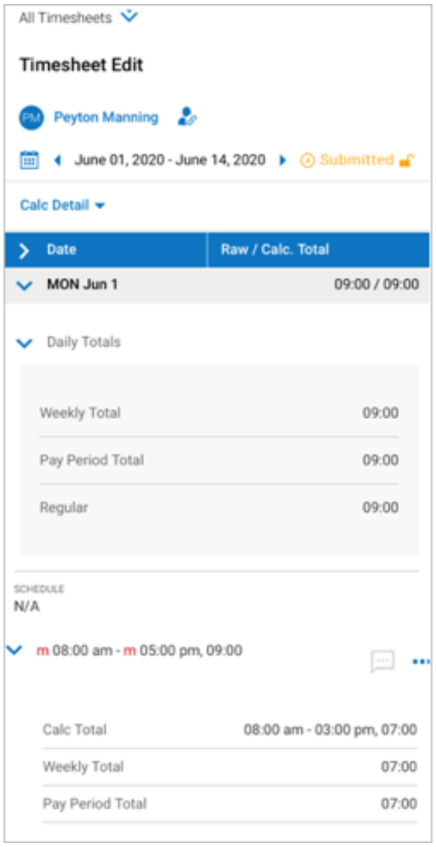


To add adjustments to hours and time off, select + *Add Adjustment*. You can also group multiple adjustments for one day.

Calc Details Tab



Below is an example of the *Calc Details* tab in the New Mobile App.

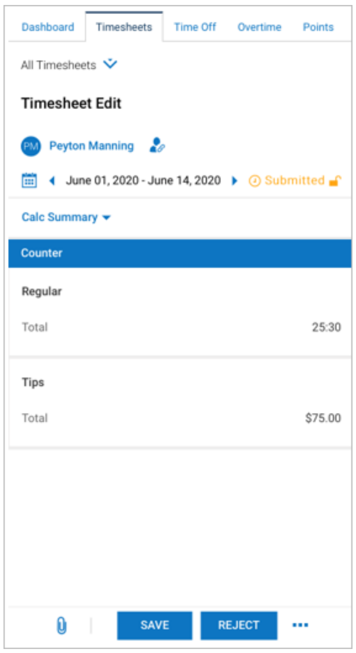


Like the *Time Entry* tab, the calc details are grouped by day. If the dates are collapsed, the calc totals will display as a high-level summary. To approve or reject, select the three-dot icon. When an entry is manually entered, a red-letter *m* will display next to the time.

Calc Summary Tab

Below is an example of the *Calc Summary* tab in the New Desktop Experience.

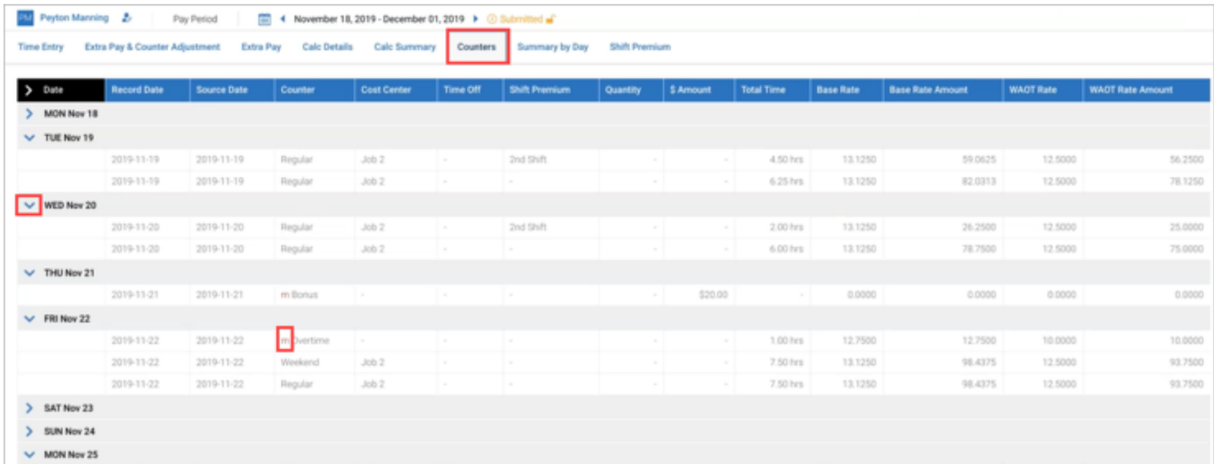
Below is an example of the *Calc Summary* tab in the New Mobile App.



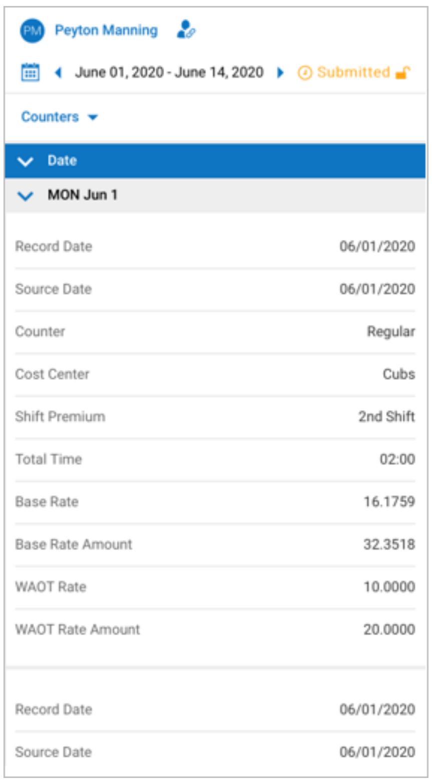
Hours, dollar amounts by the counter and pay categories are summarized, as seen in the Classic Timesheet.

Counters Tab

Below is an example of the *Counters* tab in the New Desktop Experience.

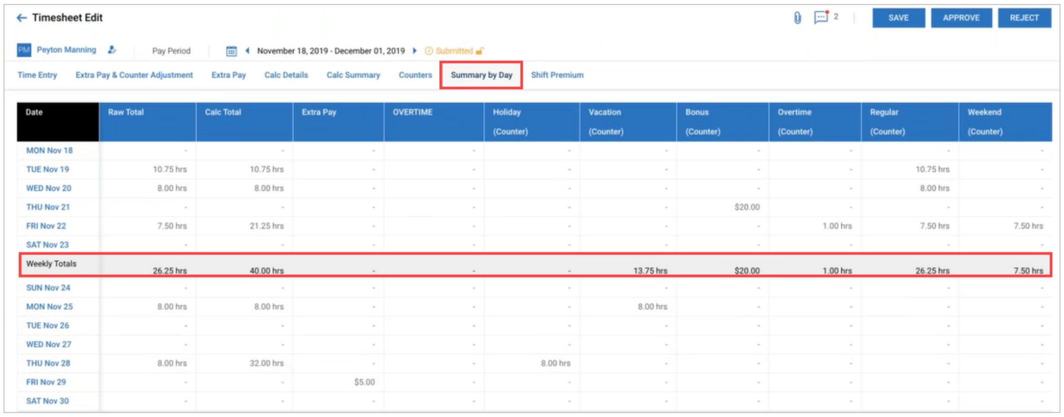


Below is an example of the *Counters* tab in the New Mobile App.



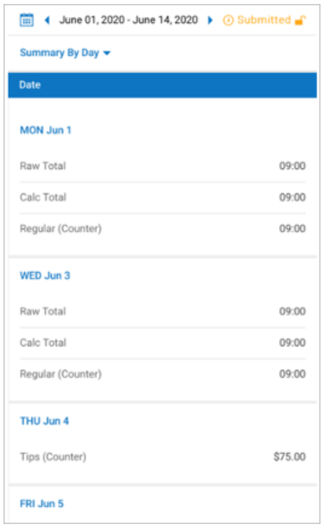
Collapse/expand all days by selecting the arrow at the top of the timesheet next to *Date*. You can also expand/collapse individual days. Like the *Calc Details* tab, a red-letter *m* will display next to manually entered counters.

Summary by Day Tab



Date	Raw Total	Calc Total	Extra Pay	OVERTIME	Holiday (Counter)	Vacation (Counter)	Bonus (Counter)	Overtime (Counter)	Regular (Counter)	Weekend (Counter)
MON Nov 18	-	-	-	-	-	-	-	-	-	-
TUE Nov 19	10.75 hrs	10.75 hrs	-	-	-	-	-	-	10.75 hrs	-
WED Nov 20	8.00 hrs	8.00 hrs	-	-	-	-	-	-	8.00 hrs	-
THU Nov 21	-	-	-	-	-	-	$20.00	-	-	-
FRI Nov 22	7.50 hrs	21.25 hrs	-	-	-	-	-	1.00 hrs	7.50 hrs	7.50 hrs
SAT Nov 23	-	-	-	-	-	-	-	-	-	-
Weekly Totals	26.25 hrs	40.00 hrs	-	-	-	13.75 hrs	$20.00	1.00 hrs	26.25 hrs	7.50 hrs
SUN Nov 24	-	-	-	-	-	-	-	-	-	-
MON Nov 25	8.00 hrs	8.00 hrs	-	-	-	8.00 hrs	-	-	-	-
TUE Nov 26	-	-	-	-	-	-	-	-	-	-
WED Nov 27	-	-	-	-	-	-	-	-	-	-
THU Nov 28	8.00 hrs	32.00 hrs	-	-	8.00 hrs	-	-	-	-	-
FRI Nov 29	-	-	$5.00	-	-	-	-	-	-	-
SAT Nov 30	-	-	-	-	-	-	-	-	-	-

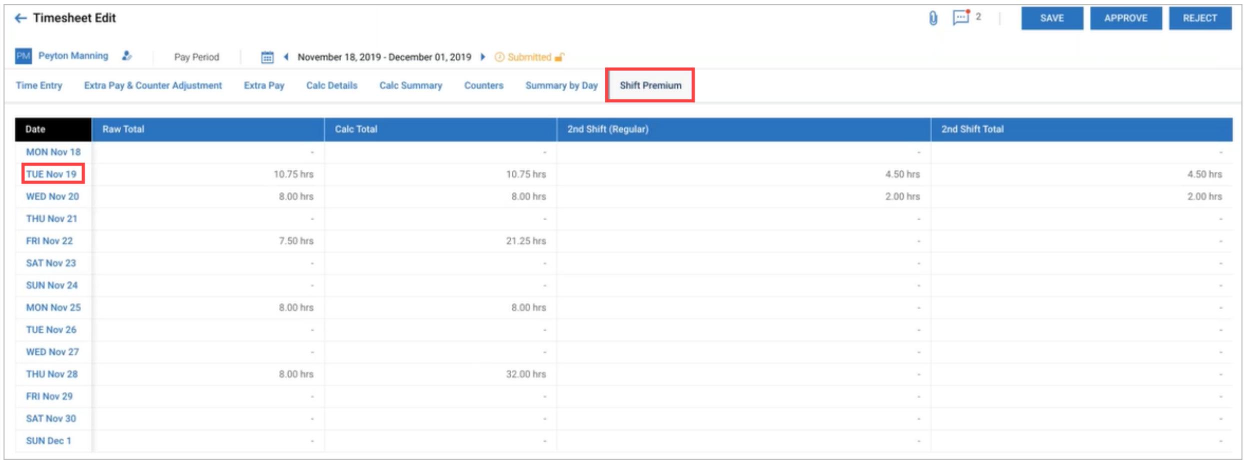
Below is an example of the *Summary by Day* tab in the New Mobile App.



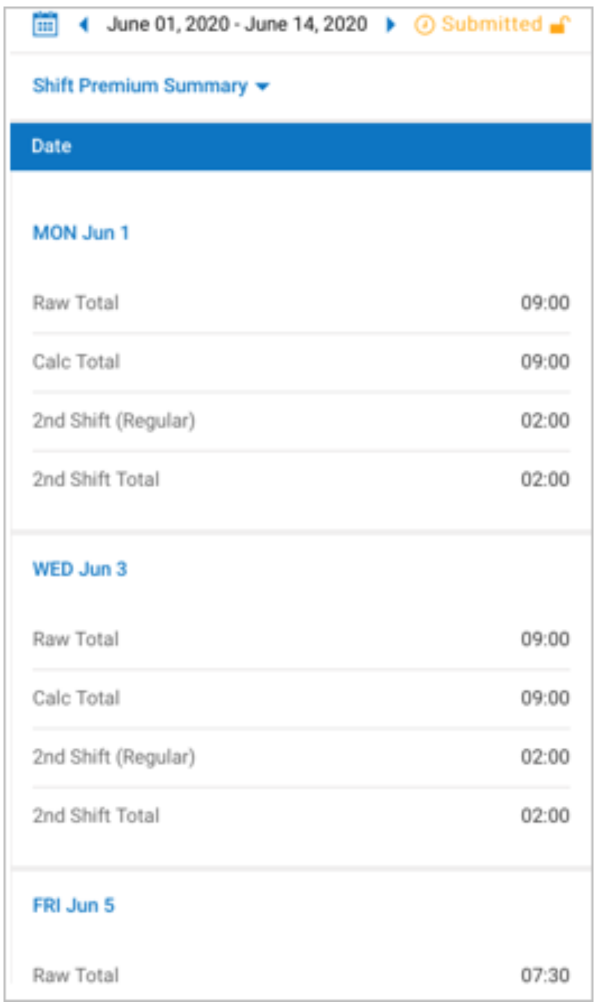
You can now view calc summary details from the *Summary by Day* tab and verify that all counter totals are correct for each day. Times and totals can also be validated on a weekly basis at the bottom of the screen in the New Desktop Experience, or through a pop-up window in the New Mobile App. *Weekly Totals* of each column will display at the bottom of each week.

Shift Premium Tab

Below is an example of the *Shift Premium* tab in the New Desktop Experience.



Below is an example of the *Shift Premium* tab in the New Mobile App.



Under this tab, you can view the Calc and Raw totals, as well as the Shift totals. When you select any of the dates, you will be navigated to the *Time Entry* tab.

Timesheet Features Coming Soon

Additional New Timesheet features will be available in future releases. The following table identifies the features to look out for, which sections of the Timesheet Profile they will be found in, which Timesheet Profile types the features are tied to, and the planned release schedule.

Feature	Timesheet Profile Section	Timesheet Type	Planned Release
Multi-EIN Master Timesheet	N/A	Start/End All Days & Bulk Hours	R70
Historical Timesheet Corrections	N/A	Start/End All Days & Bulk Hours	R70
CC 1-10 > Show in Tooltip	Time Entry Collected Data	Start/End All Days & Bulk Hours	R71
Collect Extra Pay With an OUT Punch	Timesheet Punch Settings	Start/End All Days	R70
Manager Change Cost Center On Mobile	Timesheet Punch Settings	Start/End All Days	TBD
Show Change Cost Centers Punch	Timesheet Punch Settings	Start/End All Days	R70
Show Change Cost Centers Punch Label	Timesheet Punch Settings	Start/End All Days	R70
Prompt For CC 1-9, Jobs	Timesheet Punch Settings	Start/End All Days	R70
Prompt For CC 1-9, Jobs (Default Action)	Timesheet Punch Settings	Start/End All Days	R70
Show Collect Extra Pay	Timesheet Punch Settings	Start/End All Days	R70
Show Collect Extra Pay Label	Timesheet Punch Settings	Start/End All Days	R70
Pay Category	Timesheet Punch Settings	Start/End All Days	R70
Counter	Timesheet Punch Settings	Start/End All Days	R70
Show Change Cost Centers Time Allocation	Timesheet Punch Settings	Start/End All Days	R70
Show Change Punch Interpretation	Timesheet Punch Settings	Start/End All Days	R70
Show Punches On Map	Timesheet Punch Settings	Start/End All Days	R71
Web Punch Access Profile	Timesheet Settings	Start/End All Days	R70
Day Starts	Start/End Time Entry Settings	Start/End All Days	R71
If Time Entry Spans Two Days	Start/End Time Entry Settings	Start/End All Days	R71

Feature	Timesheet Profile Section	Timesheet Type	Planned Release
Split On Day Line When Pay Period Changes	Start/End Time Entry Settings	Start/End All Days	R71
Split On Day Line Before (Mon-Sun)	Start/End Time Entry Settings	Start/End All Days	R71
Enable Break/Lunch Time	Start/End Time Entry Settings	Start/End All Days	R71
Enable Break/Lunch Time Label	Start/End Time Entry Settings	Start/End All Days	R71
Prefer Default Cost Center	Start/End Time Entry Settings	Start/End All Days	R71
Approval History	Timesheet > Utilities	Start/End All Days & Bulk Hours	R71
Show Time Sheet Information Box	Extra Settings	Start/End All Days & Bulk Hours	R70
Enable Keyboard Navigation	Extra Settings	Start/End All Days & Bulk Hours	R71
Highlight Edited Time	Extra Settings	Start/End All Days	R70
Show Timesheet Totals	Extra Settings	Start/End All Days	R71
Highlight Weekends	Extra Settings	Start/End All Days	R70
First Weekday	Extra Settings	Bulk Hours	R70
Remember Timesheet State	Extra Settings	Bulk Hours	R70
Copy Previous Timesheet State	Extra Settings	Bulk Hours	R70
Clear Duplicates from View	Extra Settings	Bulk Hours	R70
Reject Already Approved Timesheets (Enabled)	Manager Policies	Start/End All Days & Bulk Hours	R70
Reject Already Approved Timesheets (Level)	Manager Policies	Start/End All Days & Bulk Hours	R70
All Manager Changes Require Comment	Manager Policies	Start/End All Days & Bulk Hours	R70
All Manager Changes Require Reason Codes (Enabled)	Manager Policies	Start/End All Days & Bulk Hours	R70
All Manager Changes Require Reason Codes (List)	Manager Policies	Start/End All Days & Bulk Hours	R70
Require Time Entry Note Upon Rejection	Manager Policies	Start/End All Days & Bulk Hours	R70
Timesheet With Changes Made By A Manager Will Be Returned Back To Employee For Resubmission	Manager Policies	Start/End All Days & Bulk Hours	R70
Reopen Timesheet (Enabled)	Employee Policies	Start/End All Days & Bulk Hours	R70
Reopen Timesheet (Level)	Employee Policies	Start/End All Days	R70

Feature	Timesheet Profile Section	Timesheet Type	Planned Release
		& Bulk Hours	
All Employee Changes Require Comment	Employee Policies	Start/End All Days & Bulk Hours	R70
All Employee Changes Require Reason Codes (Enabled)	Employee Policies	Start/End All Days & Bulk Hours	R70
All Employee Changes Require Reason Codes (List)	Employee Policies	Start/End All Days & Bulk Hours	R70
Limit Managers Time Off (List)	Time Off Settings	Start/End All Days	R71
Separate Time Off and Cost Centers	Time Off Settings	Start/End All Days	R71
Show Days	Calc. Detail	Bulk Hours	R71
Editable	Exceptions	Bulk Hours	R71
Editable (By Employee)	Exceptions	Bulk Hours	R71

NEW Attestation Punch

Attestation Punch – TS Clock (Desktop & Mobile)

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

42980, 42981, 168924, 178336: Previously, attestation was not available for in punches and punches **outside of the employee's schedule.**

What's new: Attestation will still function in its normal capacities, such as at the end of an employee's shift or when they submit their timesheet, but users can also now capture attestation for various punch situations, such as when the employee clocks back in from their lunch break.

This will be helpful for the following situations:

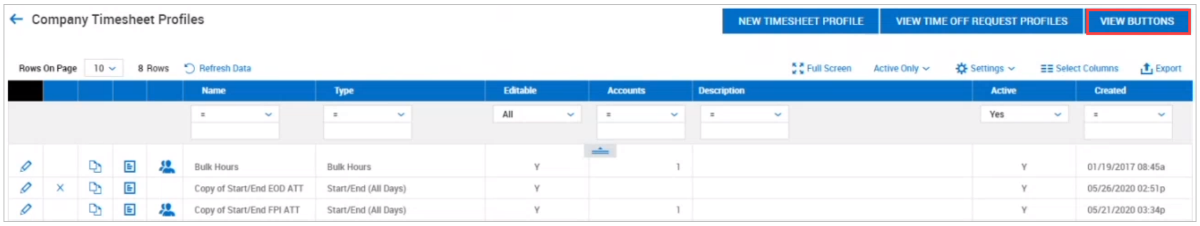
- Employees may not always have a schedule because of various reasons including an on-call shift or the customer simply does not take advantage of our scheduling solution.
- The employee leaves early or is very late and misses the attestation prompt window.
- The employee takes a late break and is prematurely prompted.
- An employee clocks out after their first shift and clocks into a new unscheduled shift and works a second shift with no meal break, thus not being prompted after the second shift.

Timesheet Buttons

Customizable timesheet buttons are now available for New Timesheet* and InTouch device users, which will allow you to capture attestation without the need for Schedules.

***NOTE:** *Mobile* must be enabled for *Timesheet View* under *Timesheet Settings* in order to configure this new functionality.

The button(s) that are configured and enabled will display on the employee's timesheet, and you can link an attestation Workflow to the custom button. There is only one place for a workflow, so while every new button can trigger attestation, it is the same workflow triggered every time.
To add a new button or edit existing buttons, navigate to the *Company Timesheet Profiles* page, and select *View Buttons* at the top-right of the page.

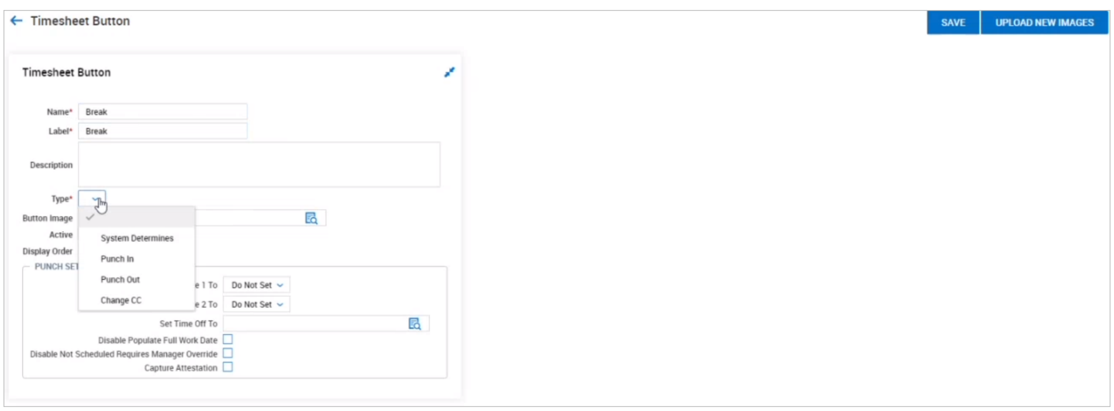


If you select *Add New* or edit an existing button, you will be taken to the *Timesheet Button* page where you can customize the name and label of the button. You then have to select which punch *Type* the button will perform. You can choose from the following four types:

- *System Determine* (this is a simple punch)
- *Punch In*
- *Punch Out*
- *Change CC*

  NOTE: *Change CC* is currently not available but will be an available option to utilize in a future release.

Any punch *Type* can capture attestation if the *Capture Attestation* checkbox is enabled within the *Punch Settings* widget on the *Timesheet Button* page.



After you configure the button, navigate to the *Timesheet Profile Edit* page.

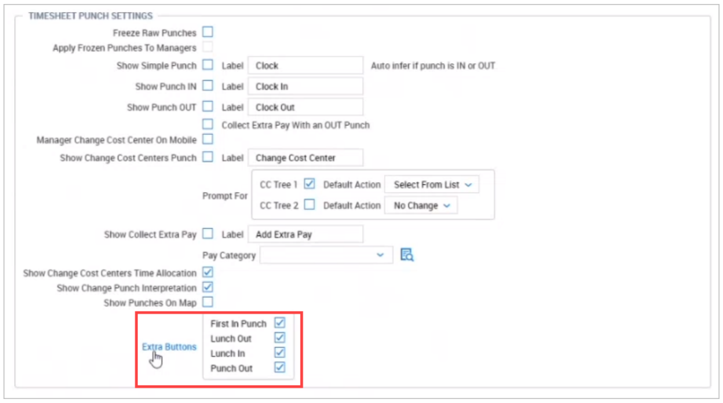
Within the *Punch Collection Settings* widget, enable *Time Collected Via Punches.*

In the *Timesheet Punch Settings* widget, you will see the *Extra Buttons* that you previously configured. *Extra Buttons* is a hyperlink that, if selected, will navigate you back to the timesheet buttons.

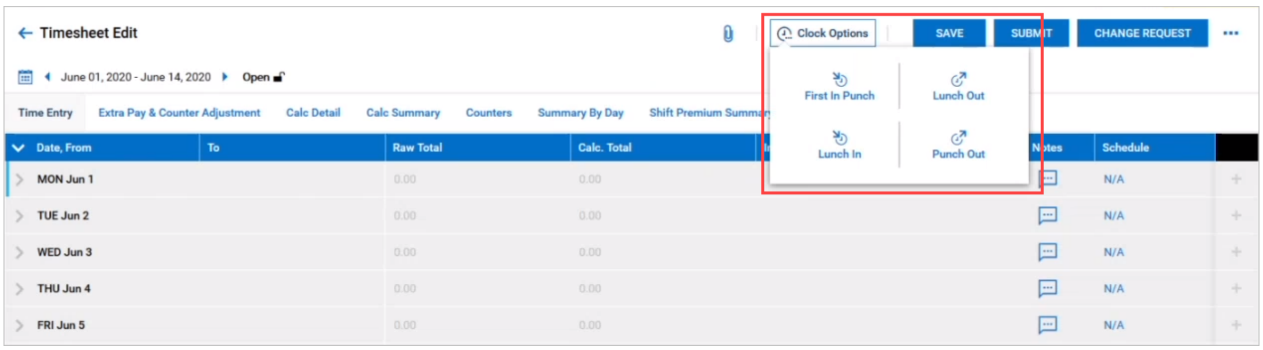
You can enable and disable depending on the timesheet profile, such as if you want a button to display for the employee to punch in, but you do not want attestation to be captured with that punch.

IMPORTANT NOTE: If you configure and enable Extra Buttons, it is recommended to disable the corresponding standard punch button for *Show Simple Punch*, *Show Punch IN* and *Show Punch OUT*. If those checkboxes and the *Extra Buttons* checkboxes are enabled at the same time, two buttons of the same functionality will display on the employee's timesheet, and the employee could then select the incorrect button for their punch action, which could result in duplication.

If you want attestation to be captured with the employee's First In Punch and you want the end of the day Punch Out attestation (existing functionality) captured, enable the extra button for First In Punch, and keep the existing standard *Show Punch OUT* button enabled.



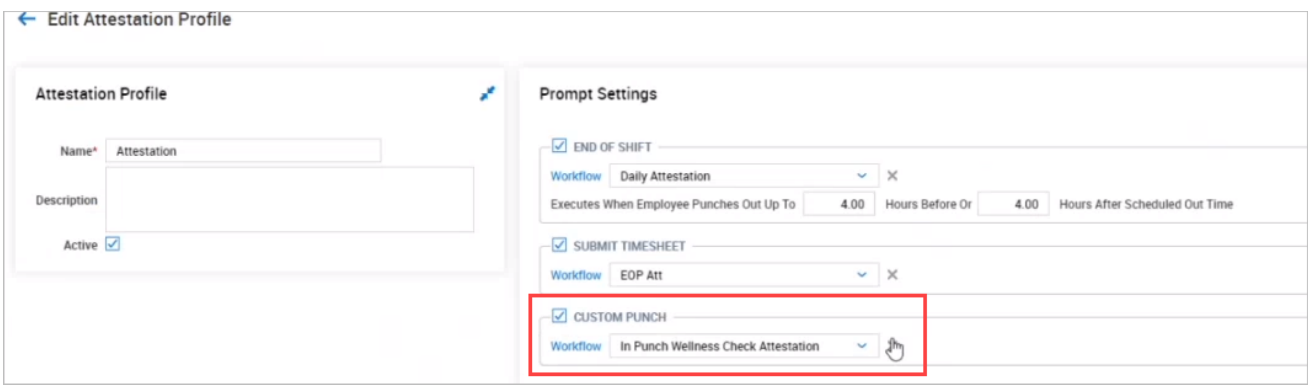
Below is an example of an employee's timesheet with the configured and enabled extra buttons.



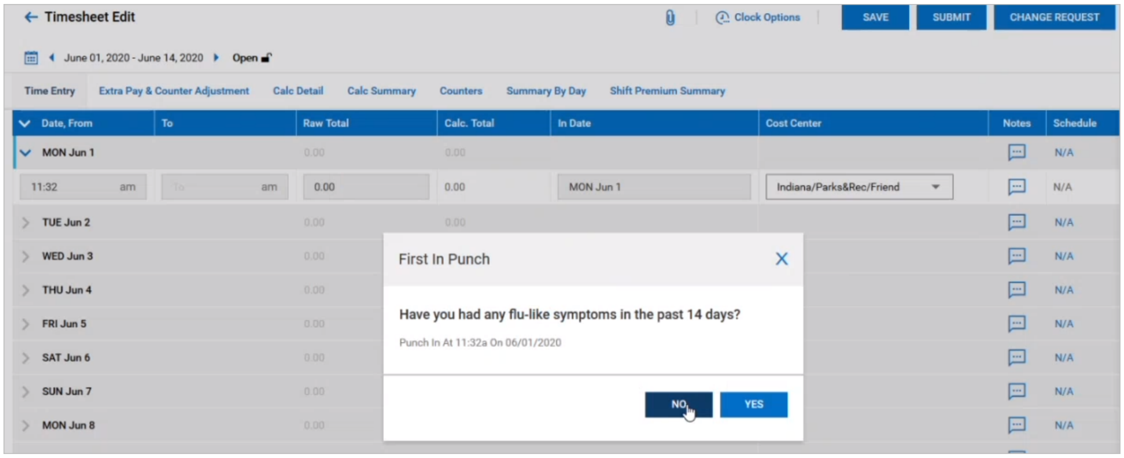
Attestation Workflow

To configure the Attestation workflow, navigate to *Company Settings > Profiles/Policies > Attestation, then add a new or edit an existing Attestation workflow.*

From the *Edit Attestation Profile* **page, within the** *Prompt Settings* **section, you can enable a new setting,** *Custom Punch***, then select a workflow.**



Below is an example of an employee punching in using the new button and the attestation question that was triggered for the employee to answer.



InTouch

If you are configuring custom punch options for the user's InTouch device, from the WFR application, navigate to *Admin* > *System* > *InTouch Installations*. Select the applicable time clock, then select *Edit Middleware Information*. Select *Terminal*, then choose an available Soft Key and do the following:

1. For the *Type*, select *Smart Punch* from the ESS menu.
2. Label the name of the punch action.
3. Set any additional security options.
4. Check the box next to *Enable Custom Punch Attestation*.

New UI: Added Missing Punches as a Report to Time Allocation (Desktop & Mobile)

162790: A new report is now available, *Missing Punches*. This will allow managers to be able to pull a report of missing punches, share this report with others, and export the report.

To access the *Missing Punches* report, navigate to *Time* > *Reports* > *Time Allocation* > *Missing Punches*.

Security permissions for allowing access to the report: Under the *Reports* tab, within the *Employee Time Reports* widget, enable *Missing Punches*.

General Enhancements

Added Current Accrue Rate to Time Off Balance Cards (Classic UI & New UI)

159215: Previously, the current accrued rate was not available in the *Time Off Balances* cards.**What's been added:** *Current Accrued* is now an available field in the *Time Off Balances* cards. This will be helpful for employees to determine how much time they earn each accrual period. This field is also visible in the tooltips in the new *Accruals Balances* widget in the dashboard.

The *Current Accrued* field will only be visible if it is enabled as a *Visible Column* in the *Global Accrual Policies*.

Calculated Time By Work Day (Time Entries) Report Not Showing In Punches (Classic UI & New UI)

165693: Previously, when users ran the *Calculated Time By Work Day (Time Entries)* report, IN punches were in some scenarios not populating the *In Date Time (Raw)* column despite the IN punches displaying on the *Detailed Hours* report. If the employee's schedule for the day was split between being clocked and piecework or time off, the system would match the piecework or time off entry to the schedule as the earliest IN, rather than the actual IN punch.

What's been added: The following columns have been added to the *Calculated Time By Work Day (Time Entries)* report:

- *Earliest In Date Time (Raw)*
- *Latest Out Date Time (Raw)*
- *Earliest In Date Time (Calc)*
- *Latest Out Date Time (Calc)*

The *Earliest In Date Time (Raw)* column will return the earliest in date time regardless if there is time off, piecework, or bulk entries being matched to the schedule first.

Employee Profile – Warning Message for Changing Holiday Table / TS Autopopulation Profile (Classic UI & New UI)

95132, 95130: Previously, users did not receive a warning message when updating the employee profile with a change to already auto-populated holiday tables or timesheet auto-population profiles. As a result, users did not know that they needed to re-run the timesheet auto-population or holiday table assignment manually.

What's changed: When changing a holiday table assignment or a timesheet auto-population profile, users will now receive a warning message, *You are changing profiles that have already been populated. Please run TS Autopopulation manually to reflect these new changes.* Or, *You are changing records in the holiday table that have already been populated. Please run TS Autopopulation manually to reflect these new changes.*

Payroll

General Enhancements

Deduction Wizard (Classic UI & New UI)

State of TN Child Support (Classic & New UI)

128377: To accommodate Tennessee Child Support orders that call for the Disposable Income to be reduced by the amount of dependent medical coverage, the Deduction Wizard now includes questions and fields to ensure that the correct garnishments are made for this situation. The questions appear to employees who work in Tennessee and have an applicable court order in Tennessee.

Imports (Classic UI & New UI)

Scheduled Deduction Import Template is Improved (Classic & New UI)

125704: The *Scheduled Deduction* import template has been updated to include improved Instructions for how to import data for the *EE Amount Calc Method*, *EE Amount Earnings List*, *ER Amount Calc Method*, and *ER Amount Earnings List* fields. With these improvements to the template, imports based on *% of Earning Deduction List* and *% of Earning+Deduction List* now function as expected.

Reports (Classic UI & New UI)

New Manual Edits Report for Pay Statements (Classic UI & New UI)

84330, 106930, 162245: A new *Manual Edits* report is now available in the system. Users can view the report by navigating to *Team > Payroll > Process Payroll*, then clicking the *Payroll Prep Process* icon or clicking *Payroll Quick Links, then* clicking *View Pay Statement Manual Edits*. For users to view this report, their security profile must have the *Payroll Prep Process* setting enabled. System administrators can view the report by default. The report is also available in the Mobile UI.

The *Manual Edits* report provides users with an easy way to view additions, deletions, or edits that users have made to a pay statement's fields. For this report, manual changes include changes made directly to the pay statement and changes made to the pay statement via imports.

Examples of the helpful information users can see on the *Manual Edits* report are:

- Name of the employee whose pay statement was manually changed.
- Name of the field that was changed.
- Type of change (add, delete, change).
- Old and new values from the changed field.
- Time stamp of the change.
- Username of the person who made the change.

New Column Added to the Child Support Calculation Details Report (Classic UI & New UI)

138426: A new column named *Account Deduction: Case ID* is now available via *Select/Add/Remove Columns* for the *Child Support Calculation Details* report.

New Fields from 2020 Federal W-4 Added to the Taxes Report

166893: The 2020 Federal W-4 form included the following new fields, which are now available to be added in the Taxes report (*Payroll > Employee Payroll Maintenance > Taxes*):

- Form 2020 W4
- Two Jobs
- Claim Dependent
- Deduction
- Other Income

Resolved

Company Setup: Could not configure custom dates for Retirement Plan

168516: Users can now configure custom dates for a Retirement Plan that is tied to an employee, as expected. Previously, in this situation, saving the custom dates resulted in an Internal System Error.

Deductions: Wage garnishment for Puerto Rico caused error

119856: The system has been updated to make correct wage garnishment calculations for Puerto Rico, so that users can now create pay statements with these garnishment deductions through the Deduction Wizard. Previously, errors sometimes prevented these pay statements from being created.

Deductions: 457b limit was combined with other plan limits

131287: The system now handles 457b retirement plan contributions as stand-alone contributions and does not combine them with other plans (such as 401k) to reach the employee's retirement plan contribution limit. Previously, for example, if an employee contributed to a 457b and to a 401k, the system applied both of those toward the employee's maximum retirement plan contribution limit.

Forms: W-4 selection of Nonresident Alien wasn't retained after processing

165934: After the system processes an employee's Federal W-4 form in which *Nonresident Alien* is the selection for Step 4, the employee's *Federal Filing Status* is populated as *Non-Residential Alien*, as expected. Previously, in this situation, the *Federal Filing Status* was sometimes *Single Or Married Filing Separately*.

General Ledger: Filter name was replaced with *Name*

104348: On the *General Ledger Override* page, when users select a filter and click *Save*, the filter name remains, as expected. Previously, after clicking *Save*, the filter name was replaced with *Name*.

Mobile: Employees did not have needed access to terminated EIN

165170: In multi-EIN companies, when an employee is terminated from one EIN, the employee can use the Mobile App to print pay statements and view historical records for both the active EIN and the terminated EIN, as expected. Previously, in this situation, the terminated EIN was disabled and the employee could not access it.

Payroll Processing: Error occurred when reopening a pay statement

150919: When a pay statement was in *Closed* status and users attempted to reopen and delete the pay statement, an internal system error would occur. Now the system displays a message to ensure that a pay statement is in *Finalized* status or *Open* status before it can be created in another payroll.

Payroll Processing: Pay statement earnings were not correct for 4 or 5 decimal place base compensation

163665: When a company's *Round Base Compensation Hourly Rate To* and *Round Base Compensation Hours In Pay Period To* fields are changed to 4 or 5 decimal places, employee earnings on pay statements reflect correct calculations based on the number of decimal places. Previously, in this situation, the pay statement earnings did not update to reflect the new number of decimal places.

Payroll Reports: Net Pay amount was unreadable on report

137463: The *Payroll Register By PST* report now displays the *Net Pay* amount (*Amt*) correctly when the employee direct deposit account name is long. Previously, for long direct deposit names, the *Amt* column would be overlapped by the direct deposit name so that the amount could not be seen.

Security: Security profile allowed too much access for Tax Settings in Mass Edit

160994: Users with a security profile that includes only View rights for *Tax Jurisdiction* cannot edit the *Tax Settings* fields in an employee Mass Edit. Previously, the *Tax Jurisdiction* field in security profiles did not control access for these Mass Edit fields.

TCC Integration: Some files were not automatically delivered to TCC

114773: For companies that use the WOTC Integration with TCC to automatically deliver payroll tax files to TCC, some files generated errors or were not delivered. This issue has been fixed and the files deliver correctly to TCC.

Workers Compensation: New NAICS Code needed to be added

169378: In *Company Setup*, the new NAICS Code of *561990 - Business Services* is available to be selected.

Scheduler

Added Lunch Columns to Scheduler Reports (Classic UI & New UI)

167369: Previously, the *Summary by Employee* and *Open Shifts* reports did not have columns that displayed lunch data for lunch breaks that were assigned to shifts.

What's been added: The following default columns have been added to the *Summary by Employee* and *Open Shifts* reports:

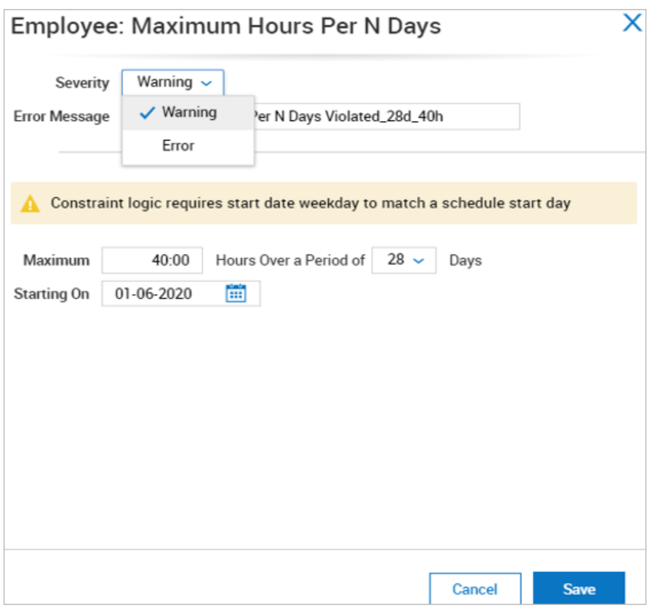
- *Lunch From* (start time of lunch)
- *Lunch To* (end time of lunch)
- *Lunch Duration* (total lunch time)

Max Hours Per N Days Constraint (Classic UI & New UI)

150798: Previously, max hours constraints were limited to weekly and biweekly, which did not satisfy constraint needs for more than two weeks.

What's been added: A new *Maximum Hours Per N Days* constraint is now available to allow for a configurable length of time to set a max hours constraint. The length of time is configurable up to how long a schedule can be configured for, which is 7-31 days only.

NOTE: You will need to ensure that the date chosen aligns appropriately with the first schedule start date.



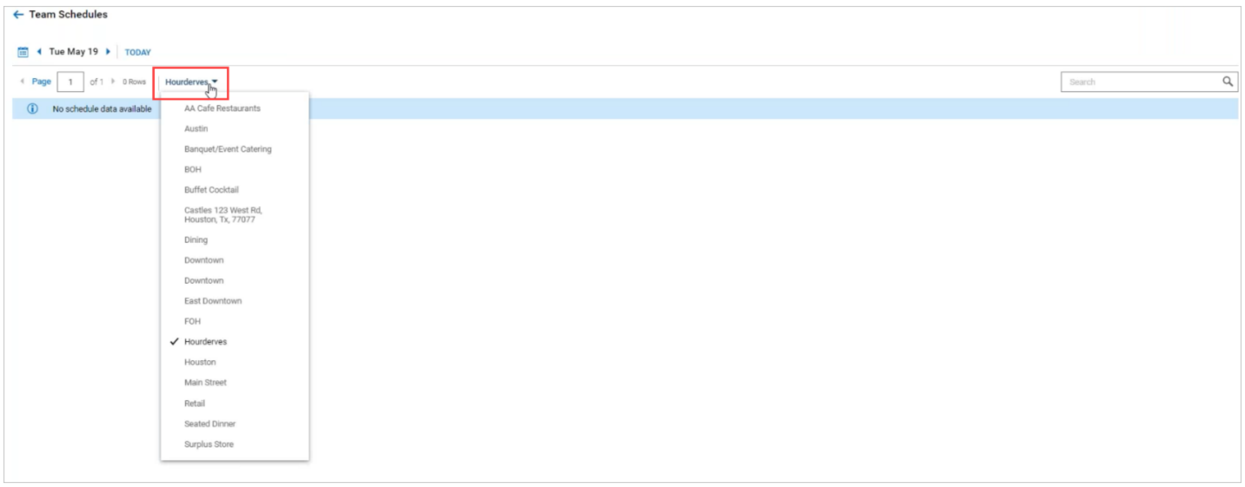
***NEW *** Employee Team Schedules View

Allow Employees to View Other Scheduled Employees (Desktop & Mobile)

165000, 169000, 166226, 165013, 165012, 165010: A new view, *Team Schedules*, is now available for employees to allow them to check their team's schedules. This will be helpful for employees when they want to do a shift swap, for example, or to see who they will be working with during their scheduled shift.

Employees can access this view from the Menu under *My Info* > *My Schedule* > *Team Schedules*.

On the *Team Schedules* page, users can choose a cost center/location to view a specific team schedule. Any cost center in the employee's profile will be an available option regardless if it is enabled on a schedule or not. The cost centers that display in this drop-down will be limited to what is set in the employee's profile.



Once the employee makes a selection, the employees who will be working in that shift will display, along with the *Start Time*, *End Time*, and *Skill*. Use the search field at the top of the page to filter attributes such as skills. Use the calendar selector or arrows to easily jump to different days and select the *Today* hyperlink to navigate back to the current day.

Security permissions: From the Security Profile, enable the checkbox next to *View Team Schedules*, within the *Time Tracking* widget under the *ESS* tab.

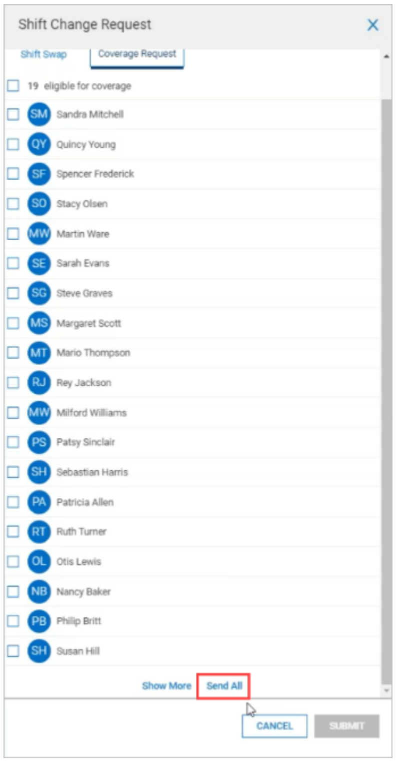
New UI: Control Time Off Types Displayed on Schedules (Desktop & Mobile)

164980: Previously, all time off type names were visible by default on schedules.

What's new: For Advanced Scheduler companies, you now have the option to control whether the names of the time off types should be visible on schedules, or not. Under *Time Off Properties* within the *Settings* widget, a new option, *Hide name in schedules*, is now available to enable. If this option is enabled, the schedule will indicate that the employee has time off, but the name of the time off type will not display.

New UI: ESS Send All Option (Desktop & Mobile)

156176, 156395: For managers, in the case where you do not want to repeatedly click *Show More* when sending a shift swap or request coverage to a large number of employees, a *Send All* option is now available so that the requests can easily be sent to all employees by one click.

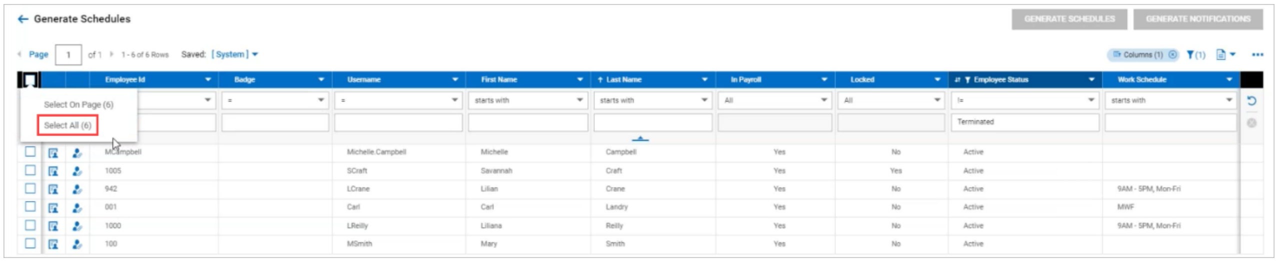


The *Show More* and *Send All* buttons are available for employees who make shift swap or coverage requests.

New UI: Select All Option for Generate Schedules (Desktop & Mobile)

167375: Previously, for Basic Scheduler users, the *Generate Schedules* screen did not have a *Select All* option, which limited the number of employees you could select at one time to 200 (max rows per page).

What's been added: Two new options, *Select All* and *Select On Page*, have been added to the *Generate Schedules* screen. This will allow you to either select all employees or select all employees that are on the page you are on.



Resolved

Basic Scheduling: Weekly Schedule Report Displayed Blank Page

173848: In the New UI, for the *Weekly Schedule* report, users can change filters and apply filters as expected. Previously, when changing or applying filters, the page sometimes went blank.

Reports: Total Scheduled Hours Included Terminated Employees

124812: On the *Schedule By Employee* report, the total of all hours in the *Total Sch. Hours* column displays the accurate total for only Active employees, as expected. Previously, the total was including Terminated employees.

Schedule: Open Shifts from Different Cost Centers were Grouped Together

141453: When viewing Open Shifts on a schedule, shifts with the same child Cost Center name but different parent Cost Centers are not grouped together, as expected. Previously, in this situation, the system would group the shifts from different parent Cost Centers together, because it did not recognize the difference in parents.

Schedule: Timesheet Did Not Post if Shift Crossed Days and Went into Next Pay Period

166128: When an employee's assigned shift crossed midnight on the last day of the schedule and at the end of a pay period, the shift would not post to the timesheet. This has been fixed and shifts that cross midnight at the end of a pay period into the next pay period will now convert to TLM shifts as expected.

Schedule Settings: "Include Lunch In Totals" Setting was Disregarded

166342: When the *Include Lunch In Totals* setting is enabled in Schedule Settings, the *View By Week* report considers that setting to calculate both the *Total Time* column and the total hours posted at the top of the report. Previously, in this situation, the total hours posted at the top of the report were different because they disregarded the setting.

Schedule Templates: Schedule Templates Included Posted Shifts

165935: In the New UI, shifts from Posted Schedules do not display on Schedule Templates that have the same date ranges, as expected.

Scheduling Engine: Frozen Shifts were Incorrectly Reassigned

149726: On the *Schedule* page for a bi-weekly schedule, when users freeze shifts and then click *Assign Shifts*, the frozen shifts are not reassigned, as expected. Previously, frozen shifts for the first week remained frozen, but were reassigned for the second week.

Security: Cost Center Access Incorrectly Allowed Approval Access

163476: Employees who can access all cost centers in *Managed Scheduled Cost Centers* but do not have the correct Security access for schedules to approve *Shift Swap Requests* and *Requests for Coverage* cannot approve those requests, as expected.

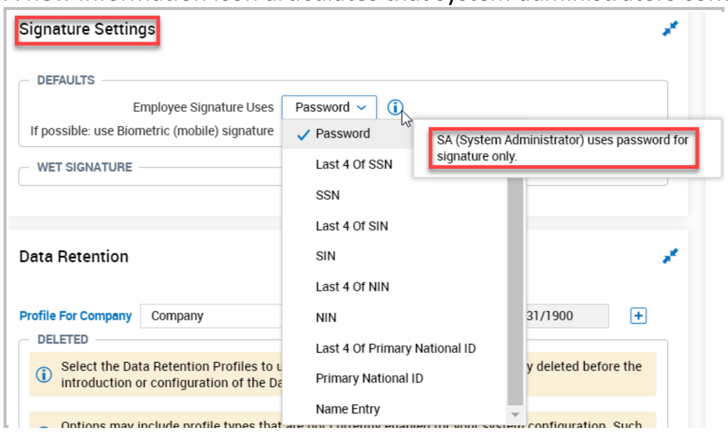
General Updates

Company Setup: Global Policies (Classic UI & New UI)

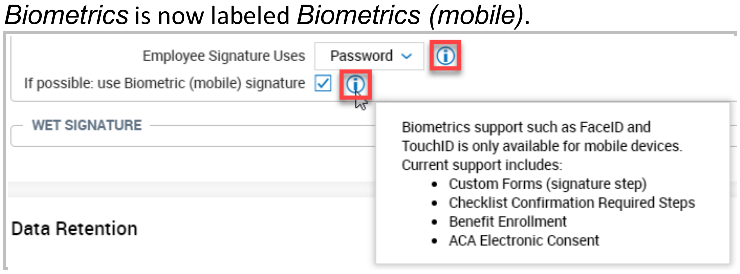
Signature Settings Widget (Classic UI & New UI)

169192: Administrators can use an updated widget, *Signature Settings*, within *Company Settings > Global Setup :> Company Setup* on the *Global Policies* tab to maintain employee signature configuration in its own widget within Company Setup.

- A new information icon articulates that system administrators continue to use a password.



- *Biometrics* is now labeled *Biometrics (mobile)*.



- The **Signature Settings** item in the *Account Policies* widget now has an information icon next to it explaining that the **Signature Settings** has been moved to the new widget that can be added via *Edit Tabs*.

- The new widget is regulated by the **Account Policies** security permissions and is available for new companies and companies without tabs modifications in the Company Setup. The widget can be added manually or by using the *Reset* button.

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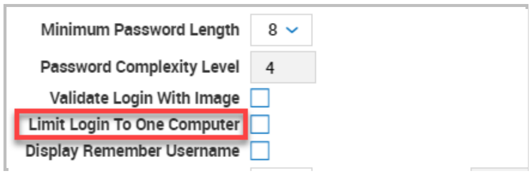
Company Setup: Password Preferences (Classic UI & New UI)

Limit Login to One Computer Session

149025: To better enhance system security, the checkbox to *Limit Login To One Computer* is enabled by default for all new companies, including companies created using the *Create New Company Using Copy* option .

This setting can be accessed under *Admin* > *Company Settings* > *Global Setup* > *Company Setup*, on the *Login Config* tab in the *Password Preferences* section.



iCal Attachment Displayed Before SMS in Notification Configuration (Classic UI & New UI)

134933: The iCalendar Attachment widget is now displayed at the bottom of notification/communication template configuration screens, providing a consistent experience when sending communication templates to Applicants.

The order of the widgets in a notification/communication template configuration is:

1. Email/Mailbox Message
2. SMS Message
3. iCalendar Attachment

When communicating to Applicants, iCalendar is always listed last underneath all message bodies.

New UI: New UI Employee Profile (Desktop & Mobile)

In the New UI Experience, Desktop and Mobile Application, we have now converted Employee Information into a New UI format. The New UI Employee Profile displays widget *Jump To* links on the left, widgets on the right, and section tabs across the top.

All Classic UI widgets have been converted, and all Classic UI actions have been converted to the New UI Employee Profile. The New UI format is a single column as opposed to the 3-column layout in the Classic profile.

There are some new features in the New UI Employee Profile detailed in the *New UI Employee Profile Enhancements*.

Widgets Converted to the New UI Employee Profile (Desktop & Mobile)

The following widgets have been converted to the New UI Employee Profile. All widgets are dependent on the same sub-systems and permissions as in the Classic UI version of the widget.

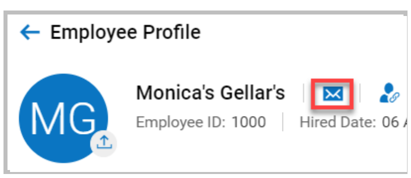
Managed Scheduled Cost Centers Scheduled Cost Centers Account Succession Plans All Forms Schedule Cost Centers	Skills Deductions Direct Deposits Tax Information Earnings Account View Form W2 1099 Payroll Alerts	Accruals 2 Balances Notes (Moved to Header) Assignment to Positions ACA Timeline Extra Fields ACA Employees Status History

Managers Pay Information Base Compensation Dates Personal Information Account Information Profiles Two Factor Authentication Account Contacts Accruals Account Demographics Custom Fields Groups Badges Hardware Settings Points Accrual Schedule Leave of Absence Workflow Delegation	Benefit Plans Delivery Policies Employee Documents Termination Details Checklists Training and Certifications Credentials Incidents Education Assigned Assets (Property) Performance Reviews Vehicles Disabilities Workers Claims Job Change History Benefit Salaries All Goals/My Goals GTLI	ACA Summary Benefit Profile – Enrollment Override Employee Perspectives Inventory Profile Managed Cost Centers Pending HR Action Requests ACA Timeline Exceptions Contracts Everything Benefits Packages Everything Benefits COBRA Initial Notices Everything Benefits COBRA Qualifying Events Everything Benefits Current Benefits Access Control Total Compensation Additional Compensation Biometrics

Creating an Email from the Header Icon in Employee Profile

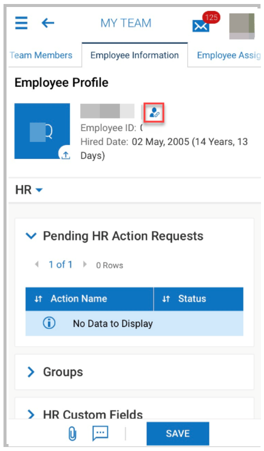
100618: Users can now create an email from the header icon in the Employee Profile using the Email Icon. When a user selects the icon to create an email, a draft is created with the user's primary email address inserted into the **To** field. The Subject line and content of the draft email are empty.

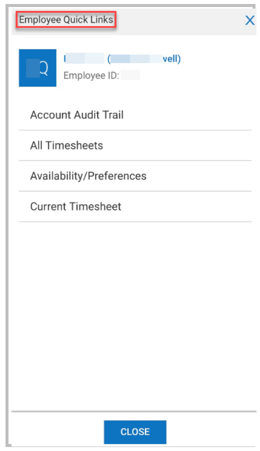
If the user does not have an email address identified, the email icon does not appear



Employee Quick Links in Employee Profile

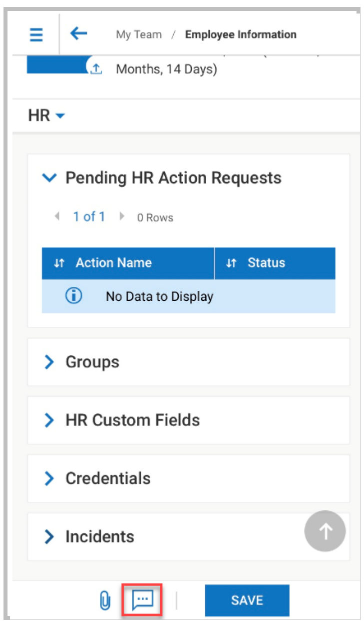
112104: The Employee Quick Links icon has been relocated to directly to the right of the Employee Name in the responsive Employee Profile. These quick links represent the same action found in Utilities of the Classic UI Profile.

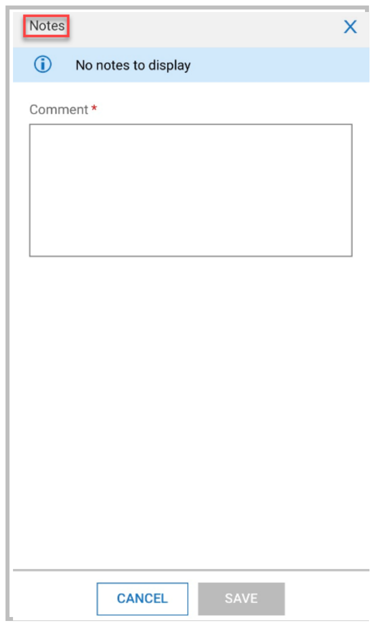




Adding Notes in Employee Profile

113969: Managers can now create and access existing notes to review from the Employee Profile.





New UI: New UI Dashboard (Desktop & Mobile)

General Information

Adjustments to Tile Layout

163509: New UI Dashboard Layout changes are independent between Dashboards. For example, if a user updates the Home tab to a List view, all other Dashboards and views remain in their existing state.

Time Statistic Widget

171427: In companies with the TLM sub-system enabled and the *Time Statistic* widget added to the Dashboard, users with the appropriate security settings can configure the *Time Statistic* widget from the Dashboard. Users can click the gear icon from the widget, which leads to the configuration pop-up where the user can set or adjust settings.

If a New UI Dashboard profile is assigned or a new Effective Date is set by an administrator, it overrides the user's *Time Statistic* widget configuration.

Attendance Board Widget

161408: In companies with the TLM sub-system enabled and the *Attendance Board* widget included in the New UI Dashboard Layout, users with the appropriate security settings can view which employees are currently In or Out according to punch times. Users can adjust columns and filtering in the widget as it uses the same features/functionality as the *Attendance Board* report.

My Schedules/My Time Off Widget

140379: Users with the appropriate security settings can view the Monthly view of each day's Schedule and Time Off data in the *My Schedules/My Time Off* widget when it is included in the New UI Dashboard Layout. If the company uses the Scheduler module, users can view additional Schedule Shift details in the widget

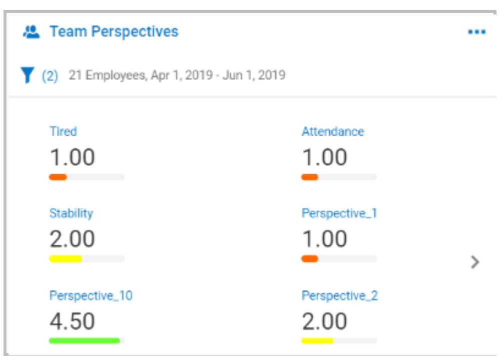
User can utilize a Calendar view to view their Scheduled workdays and days off. Users can also switch between different months.

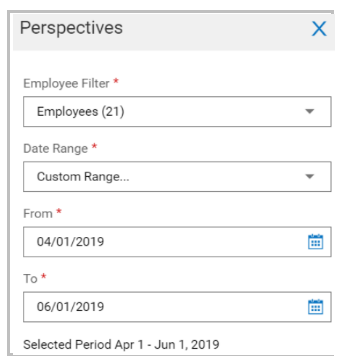
- Weekday columns are displayed in order based on the First Weekday settings in the Company Settings.
- Clicking the previous or next arrows show a different month.

NOTE: The *My Schedules/My Time Off* widget is not yet available for companies with **only** the Scheduler module, and it will not appear in the New UI Dashboard experience for them. The widget will be made available for these companies in the near future.

Team Perspectives Widget Settings

167604: The *Team Perspectives* widget settings have been updated in accordance with the latest version of the New UI Dashboard, and users now see the following settings:





Employee Image Resize and Background Update (Mobile Only)

164662: The following changes have been made to the Employee Banner in the Mobile Application:

- The employee image is now 54 px. If no employee picture is uploaded, the two initials (i.e. "JS" for John Smith) display with the blue background.
- The background image color is dark blue.
- The user's full name (First name, Last name) from their Primary EIN account displays to the user on the first line.
- The Employee ID displays to the user on the second line.

When the Landing page is first loaded, the *Back* button is disabled. If a user clicks on any Category tabs, the *Back* button remains disabled. If a user navigates to another page, then navigates back to the Landing page, the *Back* button is enabled. When a user clicks on the *Back* button, the system takes the user back to the page s/he previously visited.

Start Widget Tab Options (Mobile Only)

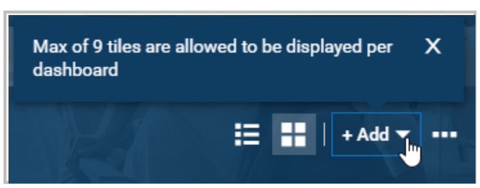
170030: Users can access the Custom and Module Dashboard tabs when viewing the Start screen upon logging in to the Mobile Application. The appropriate Start widget Layout should be assigned to the *Default Start Widget* section of the user's security profile, and the configuration Layout assigned to a user's security profile is the Start widget configuration that appears when the widget is added to their New UI Dashboard Profile. In addition, the Start screen option is enabled via the user's assigned New UI Dashboard Layout Profile.

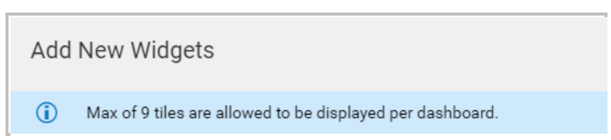
- When the Start Widget page appears, the Custom/Module tab drop-down option appears below the Employee Banner.
- The *Start* option is shown in the tab drop-down when users are on the page. When users select the tab drop-down, the *Start* option is shown at the top and is shown as selected. Users can view the other Custom and Module dashboard tabs, and if users access a different tab and then want to return to the Start page, they can choose on the *Start* option.
- If *Show Custom Dashboards*, *Show My Dashboard*, and *Show Module Dashboards* options are disabled in one or more users' assigned New UI Dashboard Layout Profile, then the tab drop-down is hidden.

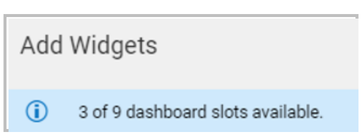
  NOTE: If only the *Start* page option is enabled, the tab overflow section of the page is hidden. If at least one of the other checkboxes is enabled, then the tab mechanism section appears.
- When the Start widget is not configured, the first Custom tab from the list for the user is opened instead. Users still can reach the Start widget page by manually clicking the *Start* tab.

Tiles Maximum/Constraint for Custom Tabs

168223: The maximum number of tiles allowed per Dashboard is now set to 9. A tooltip above the **+ Add** button displays a message explaining the 9 tiles maximum/constraint. Additionally, a message in the **Add New Widget** and **Add Chart** dialogue boxes also explains the 9 tiles maximum.

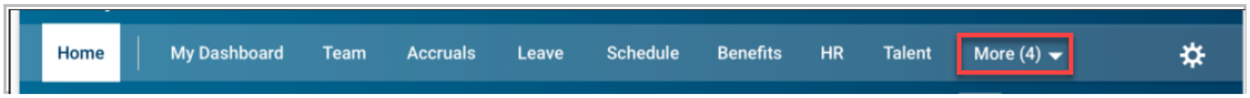






Overflow of Category Tabs in the New UI Dashboard

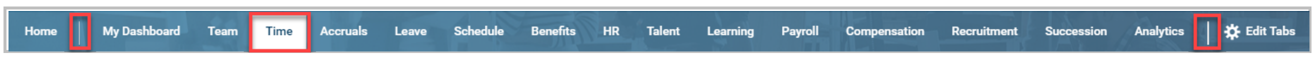
149195: An additional tab overflow component, **More** (tab), is available for use within the New UI Dashboard, helping to improve upon the current category tabs pattern. Users are able to see all dashboard tabs if the browser window size allows it, and the tabs are responsive to the window size. If the browser window gets smaller, the tabs furthest on the right are automatically moved to the **More** tab (drop-down list).



The **More** tab updates the number of tabs [*(N)*] as appropriate based on the tabs it contains due to overflow and resolution changes. The **More** text appears when no tab in the overflow is selected. When a user chooses a Dashboard tab from the **More** tab drop-down list, the tab's name displays with the *(N)*, and a checkbox marks its selected status in the drop-down.

The Edit Tab(s) option opens the Edit Tabs popup, and the gear icon appears after the tabs. If space allows, the Edit Tabs and gear icon appear on the right. If space is limited, Edit Tabs is not displayed to allow more room for the tabs.

Dividers separate Custom tabs from Domain tabs and Module Dashboards from the Edit Tab(s) option. The currently selected/viewed tab is highlighted.



Add Widgets to Domain Dashboards

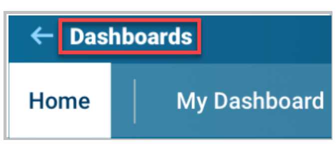
157744: Users with the appropriate security permissions to Domain Dashboards can add widgets to the Domain Dashboard Layout. Domain Layouts that contain widgets can be shared, and the widgets are also shared.

Add Button Visible and Disabled on Shared Dashboard

148481: When a Dashboard is shared with another user via the *Share with Others* option, the **+Add** button is disabled for other users and a tooltip is provided that explains *You do not have permission to edit a shared view. Use 'Save View As' option to create more views*.

Back Button Update

162344: The label next to the *Back* button on the Landing Dashboard has been changed from *Home* to **Dashboards**.



Navigate from Dashboard Banner to Employee Profile

158752: Users can navigate to their Employee Profile from the Dashboard Banner by clicking on their name or their profile image on the Landing Dashboard Banner.

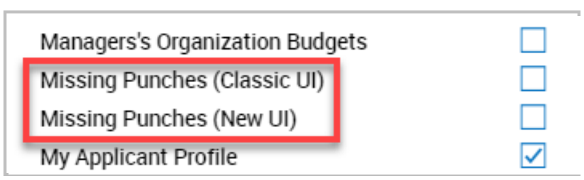
Missing Punches Widget

161406: In companies with the TLM sub-system enabled, users can review missed punches for employees' incomplete time entries from the Missing Punches widget in the New UI Dashboard. Columns and filtering can be adjusted in the widget.

- The user must have permission to view Missing Punches report in their assigned Security Profile (*Missing Punches* security item, *Employee Time Reports* section, *Reports* tab)

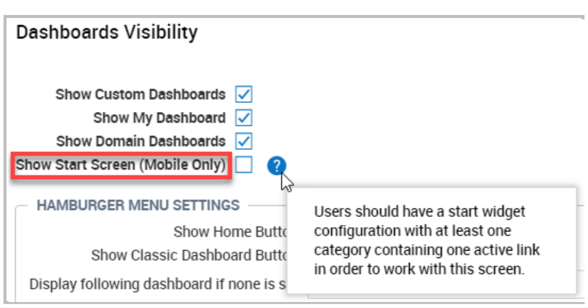
- The *Missing Punches* title provides a link that redirects users to *My Info > My Reports > Time Reports > Time Allocation > Missing Punches*. The same title is shown in the *Add Widget* pop-up and Admin widget preview.
- All of the standard New UI report functionality is available to the user, including the ability to share views, as in a normal report.
- Saved report views from the *Missing Punches* report are not available in the widget, and saved views from the widget are not available in the *Missing Punches* report or *My Saved Reports* screen.
- If a user saves a view with the inline panel expanded, the widget maintains the expanded view until the user collapses it and saves the view.
- If the user had one or more views from the Classic *Missing Punches* widget, these are views are available in the New UI widget. The default view from those views is shown when a user views the widget.
- The default view of the widget provides these columns, in the following order left to right:
  - *Employee ID*
  - *Employee First Name*
  - *Employee Last Name*
  - *Date (Sorted Descending)*
  - *Start*
  - *End*
  - *Missed Punch (Filtered to Yes)*
  - *Actions: Open Timesheet, Employee Information, Employee Quick Links*
- The default view provides the Date Filter, *Calendar Range Last N Days*, set to 7 with the *Include Today* option disabled.

The **Dashboard Widgets** security item *Custom Permissions* in the *Allowed Widgets* section on the *Dashboards* tab can be enabled. The permission for the Classic widget has been renamed *Missing Punches (Classic UI)*, and the permission for New UI widget is labeled *Missing Punches (New UI)*.



Start Screen (Mobile Only)

168930: Administrators can enable an option in the New UI Dashboard Layout Profile to expose the Start widget as a screen/page in the Mobile Application. A new option, **Show Start Screen (Mobile Only)**, can be enabled in the *Dashboards Visibility* section in the New UI Dashboard Layout Profile. A tooltip provides the following helpful information: *Users should have a start widget configuration with at least one category containing one active link in order to work with this screen*.

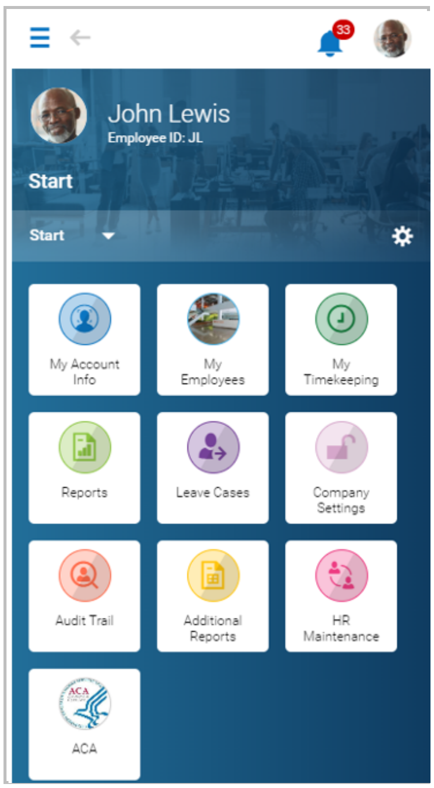


165649: Users can view only the Start screen when logging in to the Mobile Application. The Start widget's Layout should be assigned in the Default Start Widget section of a user's security profile, and the configuration Layout assigned in a user's security profile is the Start widget configuration that appears when the widget is added to the New UI Dashboard Profile. The Start screen's Layout settings can allow users to modify the layout.

When a Start widget configuration is defined for the user, an expanded version of the Start widget is shown that displays all configured Categories containing at least one link. The page displays the mobile header containing the navigation, My Mailbox, and the Employee Banner/Employee Picture.

An Informational message displays if the Start widget is not configured and at least one link in at least one Category exists. The message explains *The Start Dashboard cannot detect a configured start widget. Login into the desktop experience to customize your start widget configuration.*

The displayed categories are responsive for multiple mobile resolution widths.



New UI: Platform (Desktop & Mobile)

Mobile Login Page Interaction Updates

162849: Users with Face ID or Touch ID enabled should dismiss the device's native keyboard because the cursor is in focus within the Username field by default. This creates an extra click that can be eliminated.

- In the Mobile experience (Mobile App), the cursor is not in focus within the Username field by default.
- If Google SSO is visible, the cursor is not in focus.
- If Username Save is configured, the cursor is not in focus.

Updated Employee Picture (Mobile)

167515: The employee picture in the header/banner has been updated in the Mobile Application to match the behavior throughout the system such as:

- The picture in the header is a circle rather than a square.
- The Icon without an image is rounded.
- Users can navigate to their Employee Profile from the Dashboard by clicking on their picture/image.

Edit Photo on Start Widget Configuration (Desktop)

171899: Users who have previously uploaded an image or are going to upload new one can edit an image on the Start Widget Configuration screen (*Favorites* tab in menu).

- If a user has no image uploaded, s/he can click on the *Add Photo* link and choose an image to upload, and the *Edit Photo* popup is displayed. It is similar to the popup on the Employee Profile screen.
- If a user has an image uploaded, s/he can choose to either *Remove Photo* or *Edit Photo*.
- Users can crop an uploaded photo by adjusting the rounded area.
- After the user selects Save, the popup is closed, and the edited photo is uploaded.

Lookup Dialog Default Value in Search

WFR-168296: Single-select and Multi-select lookups have been updated as described below.

Single Select Lookup:

- The default value from within the Search field has been removed.
- The value that is currently selected uses the (blue) selected row pattern.
- If searched/filtered, the bold results pattern is still used.
- The Single Select option uses the radio button interaction introduced with report-based (Single Select) lookups and does not have an **Apply** button.

Multi-Select Lookup (single selection):

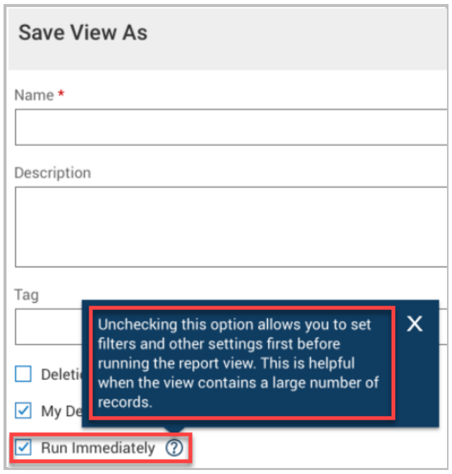
- The default value from within the Search field has been removed.
- If searched/filtered, the bold results pattern is still used.
- The Apply button interaction has been preserved.

New UI: Reports (Desktop & Mobile)

Run Immediately Option

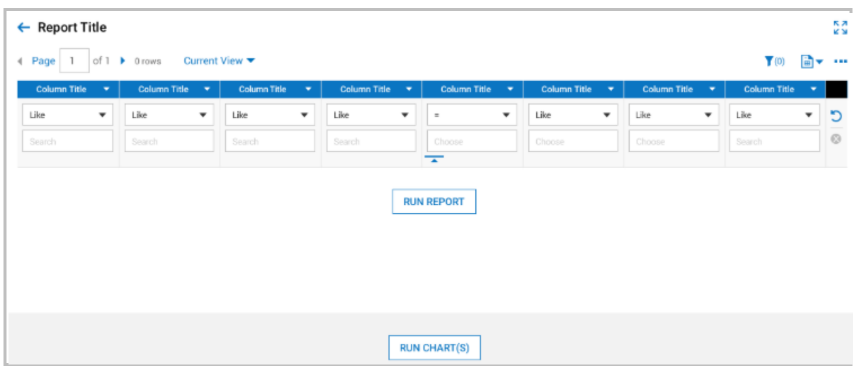
156160: Similar to the classic UI, *Run Immediately* in the New UI, when disabled, blocks reports from loading any data until a user presses a **Run Report** button, which allows s/he to set Columns, Date, and Custom Filters before the report is refreshed to show data. Also, users cannot load one or more reports until pressing a *Run* option, which decreases the time to load a report view with Data and Chart views enabled.

The *Run Immediately* checkbox in the *Save View* and *Save View As* pop-ups is located below the *My Default* checkbox. Run Immediately is enabled by default when a user Saves a View based on a System View. A Tooltip to the right of the checkbox explains what the option does.



When the *Run Immediately* checkbox is unchecked for a saved report view, when the user loads that view:

- The report view loads with all saved report settings, and the Report Header is displayed.
- The user does not get report data. The report records are not retrieved, and instead the user sees a **Run Report** button they must click to retrieve data in the report.



If the option for *View Charts* or *View Charts & Data* is enabled for a default report view and the *Run Immediately* checkbox is unchecked, when the user opens the report view, the chart data does not display, and a **Run Chart(s)** button appears. When Run Chart(s) is clicked, all charts are retrieved and appear in the chart view.

Clicking **Run Report** only loads the report table and associated data and clicking **Run Chart(s)** only loads the charts in the chart view.

Feature Retirements

Retired Features

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Platform	Report Retired	ADMIN level Mobile Log Statistic (Unique Users) report	Classic UI and New UI	This report has been removed.	June 2020
Platform	Report Retired	ADMIN level Mobile Log Statistic (Requests) report	Classic UI and New UI	This report has been removed.	June 2020
Platform	Report Retired	ADMIN level Mobile Demo Request report	Classic UI and New UI	This report has been removed.	June 2020
Platform	HTML Code in the HTML Editor	Multiple - System wide	Classic UI and New UI	This feature will be removed due to a potential security vulnerability	December 2019
Scheduler	Menu Removed	*Team > Schedule > Team Schedule View > Overview > Overview*	New UI Desktop	Consolidated the view under one Overview menu item. *Team > Schedule > Team Schedule View > Overview > Schedule Overview*	December 2019
Scheduler	Menu Removed	*Team > Schedule > Team Schedule View > Overview > Overview (Monthly)*	New UI Desktop	Consolidated the view under one Overview menu item. *Team > Schedule > Team Schedule View > Overview > Schedule Overview*	December 2019
Scheduler	Menu Removed	*Team > Schedule > Team Schedule View > Overview > Overview (Weekly)*	New UI Desktop	Consolidated the view under one Overview menu item. *Team > Schedule > Team Schedule View > Overview > Schedule Overview*	December 2019

Planned Retirements

Product/ Component	Feature	Menu Path	User Experi ence	Reason	Planned Retirement Date
Our Company in Company Settings My Company in My Info	Wiki Functionalit y	*Company Settings > Our Company Also removed from Online Help*	New UI	Functionality Removed	August 2020
TLM > Timesheet Profiles	Non-supported Timesheet Profiles	*Company Settings > Profiles/Policies > Timesheets*	New UI	Non-Supported Timesheet Profiles	October 2020
Scheduler> Schedule Templates	Schedule screen	*Scheduler > Schedules > View by Employee*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedule Templates	Schedule screen	*Scheduler > Schedules > View by Cost Center*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedule Templates	Schedule screen	*Scheduler > Schedules > Schedule Table View*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules > View by Employee*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules > View by Cost Center*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules > Schedule Table View*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules Overview*	New UI	Replaced with new schedule views	TBD