Software Release Notes

OnePoint Human Capital Management

May 2020

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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		Browser	Version
Desktop			Internet Explorer	11
Windows	7, 10		Microsoft	Edge
Mac	10.13.4 (High Sierra)		Google Chrome	latest
Mobile			Mozilla Firefox	latest
iOS	11.4.1 -> latest		Safari	latest
Android	6.0.1-> latest			

General/New UI Dashboard

New UI: Dashboard (Desktop & Mobile)

In this release, we are redesigning and adding many great new features to the home Dashboard to align your experience with the New UI. Some of the changes will be within the New UI Dashboard Layout Profile, while others will be able to be done within the dashboard itself.

New UI Dashboard Layout Profile/Configuration Changes (Desktop)

The dashboard layout configuration is located under *Company Settings > Profiles/Policies > New UI Dashboard Layout.*

Adjust Tile Layout in the New Dashboard Layout Configuration (Desktop)

144061: Users with permissions to view/edit the New UI Dashboard Layout Profile can adjust the tile layout in the new dashboard layout configuration under *Company Settings > Profiles/Policies > New UI Dashboard Layout > Edit*.

Users can adjust tile layout between two options:

- Horizontal
- Matrix

Users can adjust the tile:

- Width
- Height

The Dashboard allows for up to three tile spaces.

NOTE: Open Full Screen and Close Full Screen are available options in the Mobile Application for end users on their dashboards. These are not available options in the configuration.

Assign the New Dashboard Layout Profile to Employees (Desktop)

147536: Users (Managers, Admins) with permissions to view employees and assign the New Dashboard Profile where the employee has the first screen set to the New Dashboard Profile can assign the New Dashboard Layout Profile to their employees.

The New Dashboard Layout is shown to the employee when:

- A user is assigned the New Dashboard Profile and was not previously assigned to one.
- Multiple schedules exist within a profile and the schedule period is changing.
- When a user is assigned the New Dashboard Profile and was previously assigned to another profile, the new dashboard layout is shown to employee on their next login (reset is not required).

When changes are made to New Dashboard Profile for the current layout schedule, the employee dashboard remains as is. Administrators can create a new schedule to reset a user's layout.

If multiple schedules exist within a profile and the current layout is deleted, the previous Dashboard Layout is shown to the employee. The Custom tabs are removed.

Allow Employees/Managers to Modify the New Dashboard Layout Configuration (Desktop)

144058: Admins can allow users to modify their New Dashboard Layout configuration when they have permissions to View/Edit the New UI Dashboard Layout Profile (*Company Settings* > *Profiles/Policies* > *New UI Dashboard Layout*).

Configuration options are available to allow the admin to designate that the **User Can Modify** their dashboard. When enabled, the employee/manager has the following actions:

- **Edit Tabs** option on the landing dashboard.
- Add/Remove widgets and reports/charts.
- Edit widget configuration.
- The security/permissions remain the same.

When the **User Can Modify** option is disabled, employees/managers do not have the following actions:

- The **Edit Tabs** option on their landing dashboard (user sees what the admin has configured for them).
- Add/Remove widgets and reports/charts.
- Widget configuration is still allowed for widgets that require end user configuration.
- Adjust the height/width is still allowed.
- Filtering is still allowed.
- Rearrange is still allowed.

If a schedule period is changing and a previous schedule allowed users to modify but the new schedule does not, the **Edit Tabs** and Add/Remove options are no longer available to users when the schedule changes. Similarly, the same holds true if a profile is changed for employees and users could previously modify and no longer can.
The **User Can Modify** option on the layout profile is dynamic and changes are reflected in real time.

Update the New UI Dashboard Layout Assignment (Desktop)

155130: Admins can update New UI Dashboard Layout assignments when they have the appropriate permissions to view employees and assign a New Dashboard Profile. Employees should have their first screen set to the New UI Dashboard (Home).

Any assignment/re-assignment of a New UI Dashboard Layout Configuration profile applies a new Dashboard Layout to the user, and the new layout is applied according to its Effective Date.

Save Dashboard Widget/Layout Configurations (Desktop)

151042,156884: Users with permissions to view/edit the New UI Dashboard Layout Profile (*Company Settings* > *Profiles/Policies* > *New UI Dashboard Layout* > *View/Edit New UI Dashboard Layout Profile*, *Edit* in the *Schedule* widget) can choose to **Save** configurations such as:

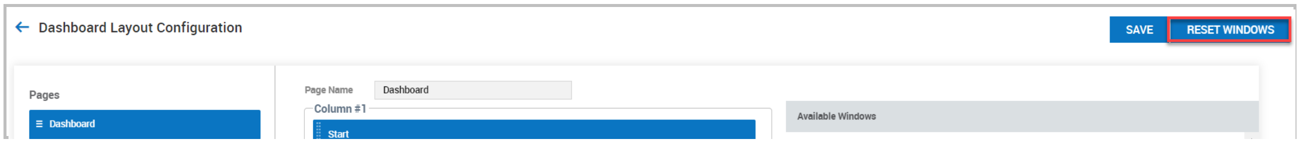
- The Screen Layout
- Widgets that have been added, removed, configured, and/or re-ordered
- Changes to the View mode (Report, Table), a selected Chart, and the Report settings

The **Save** button is available on the Admin Configuration screen of the New Dashboard Layout as a page level action. If no changes have been made, the **Save** button is disabled.

Reset Windows Widget Configurations to the Last Saved State (Desktop)

145334,156966: Administrators can reset My Windows to the last saved state in the New Dashboard Layout Configurations when they have permissions to View/Edit the New UI Dashboard Layout Profiles

(*Company Settings > Profiles/Policies > New UI Dashboard Layout, View/Edit New UI Dashboard Layout Profile, Edit* in the *Schedule* widget). Selecting the **Reset Windows** option resets the entire configuration, including the widget configuration.



The Reset Windows option is a page level action. A reset impacts the entire configuration including:

- Rearranging existing tabs
- Deletion of tabs
- Adding/Removing/Re-Order of widgets, charts/reports, and pivot charts

If a user makes changes and does not save, when selecting the **Reset Windows** button, a warning displays: *Question* (with the following text) *Are you sure you want to reset your layout to its last saved state?*

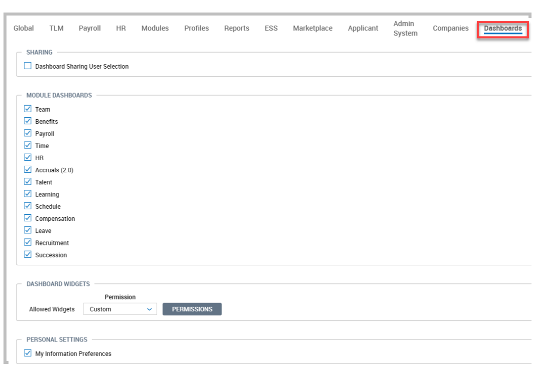
- If the user chooses **Cancel**, the pop-up disappears and the reset is ignored.
- If the user chooses **Ok**, the pop-up disappears and the reset is applied:
  - All tabs are reverted back to their last saved state, including configuration changes for tiles.

If a user does not make changes, the **Reset Windows** button is disabled.

Dashboard Security Items Moved to Dashboard Section in Security Profile (Desktop)

160558: The Dashboard Security Items have been moved to the Dashboard section in Security Profiles. The following changes were made:

- The *Allowed Windows* item is renamed to *Allowed Widgets*.
- The location of the *Allowed Widgets* security section has been moved to *Security Items > Dashboards*.
- The *Dashboards* section is available for all sub-systems.
- A new section for *Dashboard Widgets* has been added.
- The *Allowed Widgets* can be seen within *Dashboard Widgets* section.
- The settings of custom selections from *ESS > Allowed Windows to Dashboard > Allowed Widgets* can be migrated so that clients do not need to manually set the enabled/disabled widgets. All security settings will remain as they were for users.



Charts/Tiles and Reports (Desktop)

Show Chart Tile as Report on Dashboard Tile (Desktop)

145450: Users can switch between Report and Chart views on a Dashboard tile when they have the appropriate permissions to View/Edit the Report and/or Chart tile(s).

Users can toggle between the Report view and the Chart view and are able to view one Chart at a time. Users can toggle between more than one Chart if needed.

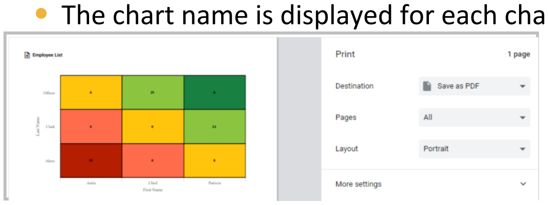
The View mode is retained when a user switches the tile from the Chart view to the data/Report view and logs out. When the user logs back in, the view remains as data/report. Report filters are only retained if a report is saved.

Users have tile level options in both the Chart view and the Report view to remove the tile and/or adjust the tile width.
NOTE: The *Save View As* and *Delete* options (under **Manage Views**) are not currently available but are planned for a future release. Users can still save changes to select views and interact with the rest of the actions/information in the **Manage Views** popup.

Print Charts from New UI Dashboard Layout (Desktop)

152815: Administrators can now print information from a New UI Dashboard Layout.

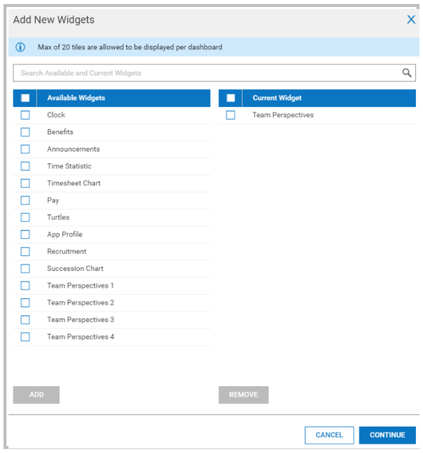
- Only charts can be printed from the new dashboard layout. The Charts preview mode is defined by the user via the *Re-arrange Tiles* side panel.
- Two charts can be printed on the same sheet if *Portrait* orientation is selected when the **A4** or **Letter** paper format is set up.
- The number of charts on the Dashboard corresponds to the number of charts in the printed pages.
- If a *No Data to Display* warning message is displayed on the chart tile, the chart will not be printed.
- The chart name is displayed for each chart.



New UI Dashboard Widgets (Desktop)

Add Widgets in the New Dashboard Layout Configuration (Desktop)

144052: Admins can add widgets in the New Dashboard Layout configuration when they have permissions to View/Edit the New UI Dashboard Layout Profile (*Company Settings* > *Profiles/Policies* > *New UI Dashboard Layout*, **Edit**).



Users can see the option to add tiles at the top of the layout configuration screen. If a tab already has 20 tiles added, **+Add** is disabled. When hovering over the action, the following Tooltip displays: *Max of 20 tiles are allowed to be displayed per dashboard*.

When a user clicks on the Add button, a drop-down appears with a Widget option. When a user selects the Widget drop-down, the pop-up opens and the user can see a list of Available widgets and Current widgets. Users can select the appropriate checkbox(es) for the widget(s) they wish to add. A widget can only be added once, and if already selected, it appears in the list of Current widgets.

A maximum of 20 combined total widgets are allowed and indicated on the panel. If 20 or less tiles are selected, an info message is displayed at the top of the panel that reads *Max of 20 widgets-are allowed to be displayed per dashboard*. If more than 20 tiles are selected, an error message displays at the top of the panel and reads: *You have exceeded 20 tiles limit*.

Once a user selects the widget(s) to be added, the user clicks Add to move them from the Available widgets panel to the Current widgets panel.

If a user saves on the Add Tiles screen, the tiles appear on the tab the user was on prior to clicking the **Continue** button. If a user cancels (or exits) the Add Tiles screen, changes are not saved and the tab layout appears as it did prior to clicking the **Add** button.

If a user does not have permissions to see a widget that is added, the widget does not appear for the user.

Add Widgets to My Landing Dashboard (Desktop)

149181: End users can now add widgets to the My Landing Dashboard Layout when the new dashboard is in use. The user must have:

- The new Dashboard Profile assigned (for the landing experience).
- Permissions to modify the Dashboard Layout (for the landing experience).
- Navigated to the Landing Dashboard.

Users can see the option to Add (**+Add**) tiles at top of the Layout Configuration screen. A maximum of 20 combined total widgets are allowed. If a tab already has 20 widgets added, the **+Add** is disabled. If a user hovers over the action, a Tooltip explains that a *Max of 20 tiles are allowed to be displayed per dashboard*.

When a user clicks on the **+Add** button, a drop-down displays with a **Widget** option. When the user selects the **Widget** drop-down, a pop-up opens and displays a list of available widgets and current widgets. Users can select the appropriate checkbox(es) for the widget(s) they want to add. A widget can only be added once, and it should appear in the list of current widgets if already selected.

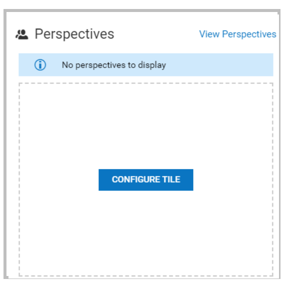
If 20 or less tiles are selected, an informational message displays at the top of the panel that reads: *Max of 20 widgets are allowed to be displayed per dashboard*. If more than 20 tiles are selected, an error message displays at the top of the panel that reads: *You have exceeded 20 tiles limit*.

If a user does not have permissions to see a widget that has been added, the widget does not appear for the user. Once a user selects widgets to be added, the user should click **Add** to move them from the Available Widgets panel to the Current Widgets panel.

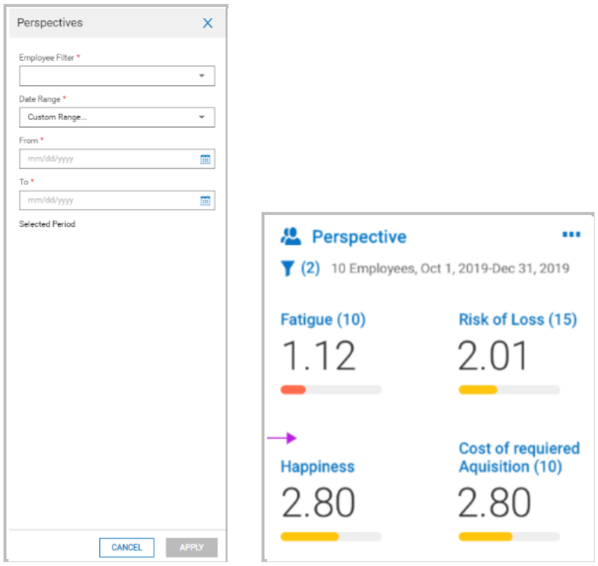
If a user saves on the Add tiles screen, the tiles appear on the tab the user was on prior to clicking the **Continue** button. If a user cancels (or exits) the Add tiles screen, the changes are not saved and the tab layout appears as it did prior to clicking the **Add** button.

Perspectives Widget in Landing Page/New UI Dashboard (Desktop)

152116,156878: The Team Perspectives widget has been migrated to the New UI Dashboard. Users can utilize the **+Add** button to add the Perspectives widget to the landing page.



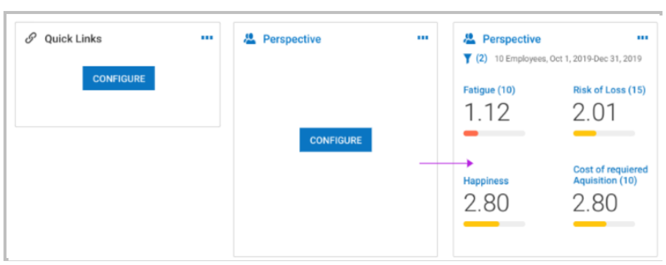
Users can select the **Configure Tile** button to display the Perspectives widget side panel so they can configure the widget. The user selects the appropriate filter(s), clicks the **Apply** button, and the Perspectives widget is displayed.



The top ellipses include the following actions:

- Remove
- Adjust Tile Width
- Adjust Tile Height

If the Team Perspectives tile has been added, but has not yet been configured, the **Configure** button is displayed. Once clicked, the filter panel opens, allowing users to select employees and dates. Once the tile has been configured, the filter icon displays with the number of filters applied and filter descriptions (read only).



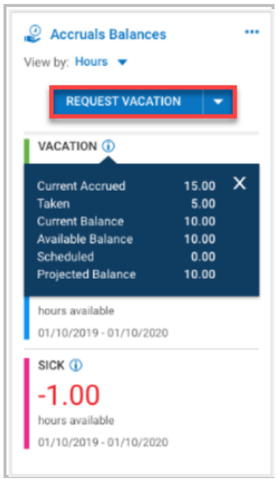
Clicking on the Perspective title redirects the user to the Perspective Score report. Clicking on the Perspective label redirects users to the Perspective Score report with the perspective filtered and the period applied.

NOTE: Widgets that were previously configured will be migrated to the new format, and the configurations will remain the same.

Accrual Balances Widget - Request Time Off (Desktop)

WFR-147661: Users can Request Time Off from the Accrual Balances widget when they have the proper security permissions to do so. The **Request** button displays the name of the Accrual Balance rule/policy that is tied to the rule/policy listed first in the widget. The second, third, fourth, etc. listed buckets fall into the split button drop-down menu (for example, **Request Vacation).**

The **Request** button is hidden if the user lacks permission to the Request Time Off security item in the assigned Security Profile (found in the *Time Tracking* section on the *ESS* tab). Tracking with the Request Time Off permission works similarly to the Time Off Balance page.



The selected value in the Accruals widget prepopulates the Time Off Type on the Time Off Request page.

Announcements Widget in the New UI Dashboard (Desktop)

139540: Users can view Active Date information, if it is set, and access the appropriate Announcement screen as a user or administrator from the Announcements widget when the Announcement widget is included into the New UI Dashboard Layout. Additionally, the user must have access to posted announcements based on Group or Security Profile settings defined per announcement.

Up to 3 uploaded documents can be tied to an Announcement, and they are available to click in the list and in the pop-up upon clicking the listed Announcement. The Announcements widget is not displayed when no Announcements exist.

When a user has access to Announcements (the Announcements security item is enabled in the Tools & Documents section on the ESS tab and in the Global Setup section on the Global tab of the assigned Security Profile), the Announcements widget title is a link that directs users to *My Info* > *My Company* > *Announcements*.

Users can review the Active Date range for the Announcement details in both the widget view and in the widget pop-up (when clicking on in the widget and when the user logins and it appears).

- When the From and To date are available, they appear below the Announcement title as *Active 12-01-2019 to 12-31-2019*.
- When just the To date is available, it appears below the Announcement title as *Active until 12-31-2019*. The Active Date cannot be saved without a To date.
- When the Active checkbox is disabled, the Announcement item information does not display.
- The Date Format shown is tied to the Company, EIN, and Locale settings.
- Active date values replace Created dates, and users can no longer view the Created date and time.

The message *No data to display* appears:

- When the user does not have the appropriate permissions to see the widget.
- When there is nothing/no data to display.

Users are not able to control the number of Announcements that can be viewed in the widget at a time. Sorting is by Created date, with the most recently created Announcements at the top.

Names of Tiles Display Correctly in Re-arrange Menu (Desktop)

153868: When a Landing or Domain Dashboard is opened and has at least two tiles as a Chart, upon switching the tile(s) to the Data Only mode and selecting **Re-Arrange Tiles**, the following apply:

- For reports, the *Report icon <Report name - Report view>* is displayed.
  - The report icon and report name are not clickable.
  - The report icon and report name are black in color.
- For charts, the *Chart icon <Report name - Chart name>* is displayed.
  - The chart icon and report name are not clickable.
  - The chart icon and report name are black in color.
- For widgets:
  - The widget icon and widget name are not clickable.
  - The widget icon and widget name are black in color.

Updates to Tile Displaying after Deletion of Parent Chart / Report View / Report (Desktop)

153901: When a tile is added as a chart to a Dashboard in a report view with 2 or more assigned charts, if the parent chart is deleted from the report view, the added tile is switched to the next chart from the set.

When a tile is added as a chart to a Dashboard in a report view with only 1 assigned chart, if the parent chart is deleted from the report view, the added tile is switched to *Data Only* mode and the report view remains the same.

When a tile is added to a Dashboard as a report in a custom report view, if the parent report is deleted from the report view, the added tile is switched to [System] report view in *Data Only* mode. The same occurs when a tile is added to a Dashboard as a chart in a custom report view and the parent report is deleted from the report view.

If a parent report is deleted, the child tile is also deleted from the Dashboard.

New Dashboard Tiles for Widgets (Desktop)

145333: Default tiles appear in the New UI Dashboard Layout Configuration in *Company Settings* > *Profiles/Policies* > *New UI Dashboard Layout* > *Edit*. If a tile requires configuration in a layout profile (for example, Time Statistics):

- **Configure** and **Remove** buttons are displayed (as is always the case for these types of widgets, even after configuration).
- When a user clicks on **Configure**, a dialog box opens for widget configuration.
- If the configuration screen is closed without saving the configuration, the **Configure** and **Remove** options display again. If the configuration is saved, the widget framework displays and the **Configure** and **Remove** buttons are still shown.
- If a user wants to edit the configuration after saving, s/he can click the Configure button again, which opens the configuration dialog with the existing configuration.
- If a user clicks **Remove**, the widget is removed from the display and the space is filled by other tiles.
- If a user does not complete actions for the widget and save the Dashboard Layout, the tile is kept. The widget displays as blank on the end-user dashboards with no option to configure. A warning message on the blank tile on the landing page for the end user explains that the *Widget has not been configured. Please contact your system administrator.*
  - When a user again accesses the profile, the Configure and Remove buttons display.

If a tile requires configuration on the Landing Page (for example, Employee Perspectives, Sticky Notes):

- The **Remove** button only displays in the Dashboard Layout Profile (as is always the case for these types of widgets). A warning message displays above the **Remove** button on the tile in the layout profile: *Widget should be configured on landing page by manager with direct reports*.
- The **Remove** button is hidden under the ellipsis on the Landing Page of end users.
- The **Configure** button appears on the Landing Page tile for end users if it has never been configured. Once configured, the end user has access to edit the filter or configuration via the filter icon or gear icon (based on the type of widget).

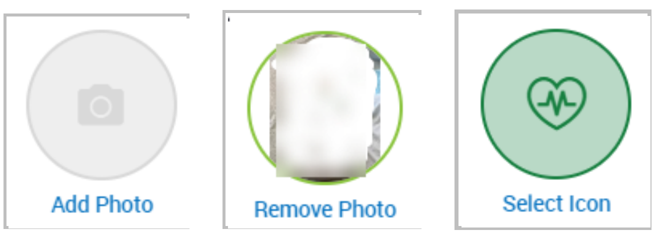
If a tile does not require configuration (for example: Clock, Announcements):

- The **Remove** button only displays in the layout profile (as is always the case for these types of widgets), and is hidden under the ellipsis on landing page of end user
- If a user clicks **Remove**, the widget is removed from display and the space is filled by other tiles.

Start Widget Configuration Icons and Colors (Desktop)

148665: Users can view updates made to the Start widget Configuration Page so that interactions with the buttons are consistent.

The default icon for the Add Photo functionality has been updated to ensure a consistent visual experience.



Start Widget Updates in the New UI Dashboard (Desktop)

153873: In the New UI dashboard, several improvements have been made to the Start Widget, such as:

- The Icons are slightly larger and expand when hovered over.
- The Categories remain closer together for improved visibility.
- The long Category names are no longer truncated.
- The Link lists are responsive to browser size changes.
- The Link names are no longer truncated.

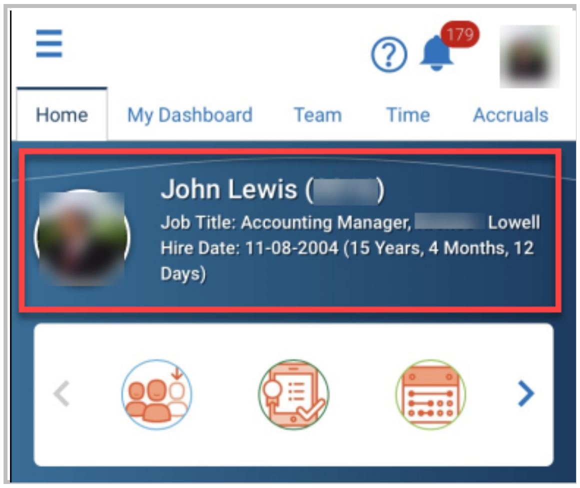
Employee Banner for the Mobile Application (Mobile)

159429: The Employee Banner now displays in the Mobile Application on the Home tab to improve the visual experience by adding color and strengthening the experience for users. The following data displays for the user:

- The user's full name (First Name, Last Name) from their primary EIN account.
- The user's Job/Position Title followed by the name of the primary EIN, separated by a comma.
  - If no Job or Position titles are available, the Job Title line does not display in the banner.
  - If the user has a saved Default Job in his/her profile and has saved Position data, the Job Position shows the Position value in the banner.
  - If the user has a saved Default Job in his/her profile and does not have Position data, the Job Title shows the Default Job in the banner.

- The user's Employee ID in parentheses to the right of his/her name.

The employee's picture also displays in the top left corner. If no employee picture is uploaded, the employee's initials with the blue background display.



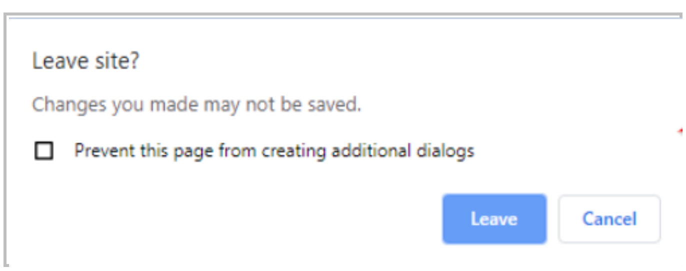
Technical Updates (Desktop)

Warning Message to Verify Changes are not Saved (Desktop)

157750: Administrators with permissions to View/Edit the New UI Dashboard Layout Profile (*Company Settings* > *Profiles/Policies* > *New UI Dashboard Layout*) receive a warning message to verify when changes have not been saved.

When a user clicks to close out or refresh the browser window, clicks the browser back button, or clicks a navigational link in the application's header, if unsaved changes exist, then:

- A native warning message/pop-up from the browser appears that reads: *Leave Site? Changes you made may not be saved.*

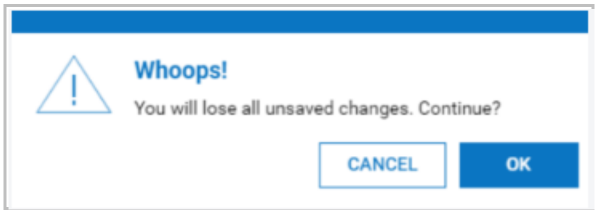


NOTE: The example above is from Google Chrome. The message may have a different look in other browsers.

Warning Message Concerning Unsaved Changes (Desktop)

146809: Administrators receive a warning message when changes haven't been saved when they have permissions to View/Edit the New UI Dashboard Layout Profile (*Company Settings* > *Profiles/Policies* > *New UI Dashboard Layout*).

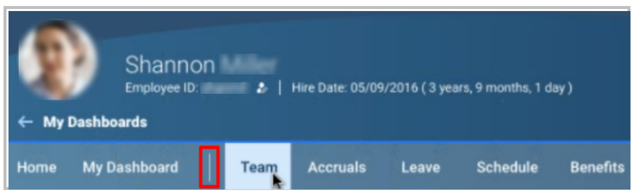
When a user clicks the Back button in the application or a link in the hamburger menu after making a change and not saving, a warning message/pop-up appears that reads: *You will lose all unsaved changes. Continue?*



If the user clicks CANCEL, s/he remains on the current page with the unsaved changes. If the user clicks OK, s/he is directed to a new page and the changes will not be saved.

One Row Display for Landing and Domain Dashboards (Desktop & Mobile)

159165: Landing and Domain Dashboards now display in one row. Users can scroll tabs if there is not enough space to display all tabs on the screen.



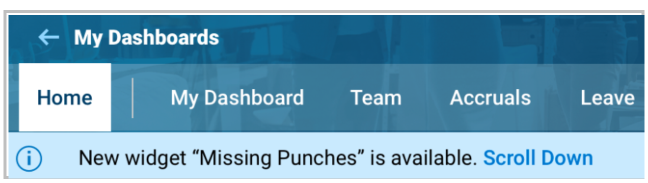
Each Domain tab contains a New UI Dashboard. Reports and charts inside each tab include the same data as in the Module Dashboards in the main menu.

Home Tab Created by Default with New Schedule (Desktop & Mobile)

159976: A Home tab is now created by default when a new schedule has been assigned. When an Admin creates a new schedule and assigns a Dashboard Layout Profile with the schedule to employees, the system creates a Home tab for users and reproduces the same layout from the previous schedule.

Color of Selected Dashboard Tab (Desktop)

161300: The selected Dashboard category tab now displays in white to highlight what is selected and ensure that informational messages display in a different color.



The layout controls appear below the row with the Dashboard tabs. The Saved View selector on module dashboards in the landing experience align with this row.

Report/Chart Tile Mobile Adaptation for Desktop (Desktop)

162408: The Mobile view is represented in the Desktop when the width of a tile is one column. When the width of a tile is two (or three) columns, the view of report is the normal view in a Desktop report.

Improved Module View (Desktop & Mobile)

162610: The employee banner has been removed from the Module Dashboards in the Hamburger menu. Additionally, on all Module Dashboards from the Hamburger menu (excluding the landing page), the *Saved :[System]* is positioned in the left corner.

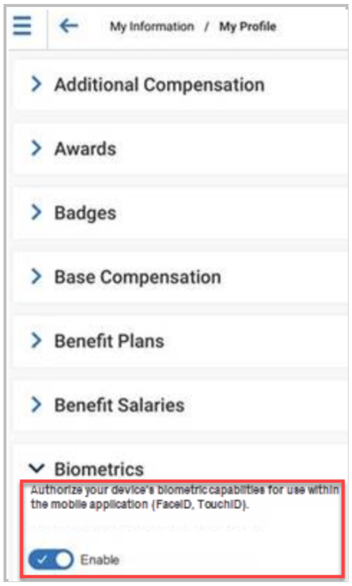
Tile Quantity for Module Dashboards (Desktop)

163196: The optimal and maximum quantity of tiles in a Domain Dashboard is now 9 in the Hamburger menu and on the Landing Page. On the Home tab, the maximum number of tiles is 20.

New UI: Electronic Signature

Biometrics Signature Enabled with Authentication Permission (Mobile)

156554: Where applicable, Electronic Signature (Biometrics) enablement is now available under *My Information* > *My Profile* in order to give users an easier experience using biometrics for signature type activities.



New UI: Employee Information

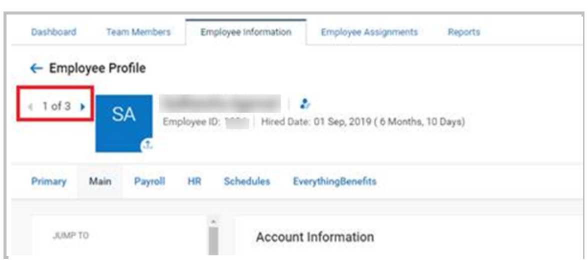
Job Title in Employee Information & My Profile Header (Mobile)

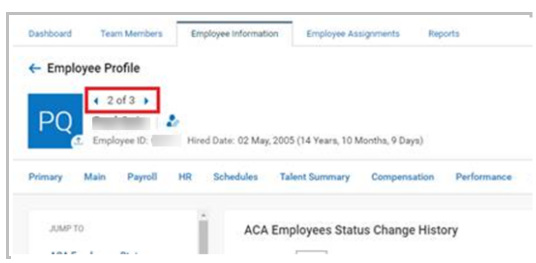
166559: In the New UI mobile environment, employee job titles were missing from the Employee Information and My Profile headers and have now been added.

New UI: Employee Profiles

Update Setup with Custom Placement of Options (Desktop & Mobile)

142617: The Employee Profile and Applicant Profile have been updated so that the toggle between tabs is now to the right of the image instead of above the user's image.





NOTE: This change is applicable for the Employee Profile in the Mobile Application and the Applicant Profile in the Desktop and Mobile Application.

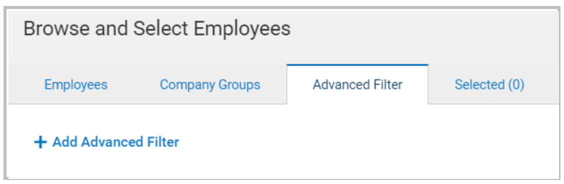
New UI: Employee Filters (Desktop)

Advanced Filters (Desktop)

Employee Filters: Set and Modify Advanced Filters (Desktop)

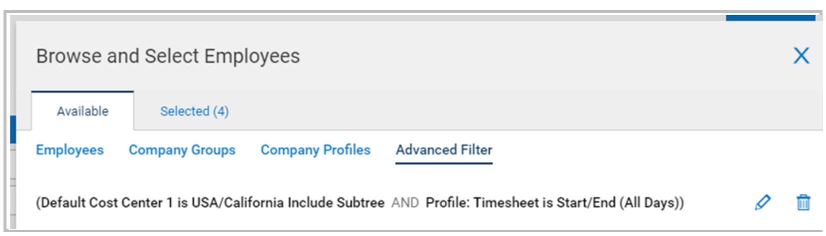
82116: Users can now set and modify Advanced Filters when selecting employees via an Employee Filter. This allows users to retrieve data for the appropriate set of employees in reports.

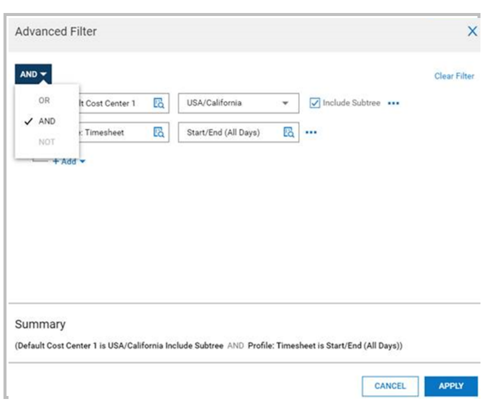
The Advanced Filter component is integrated into the Employee Filter on the Advanced Filter tab given that the Employee Filter is provided in the report. Users must activate the Employee Filter by clicking the Columns pill or Filter icon, then clicking Browse in the drop-down.

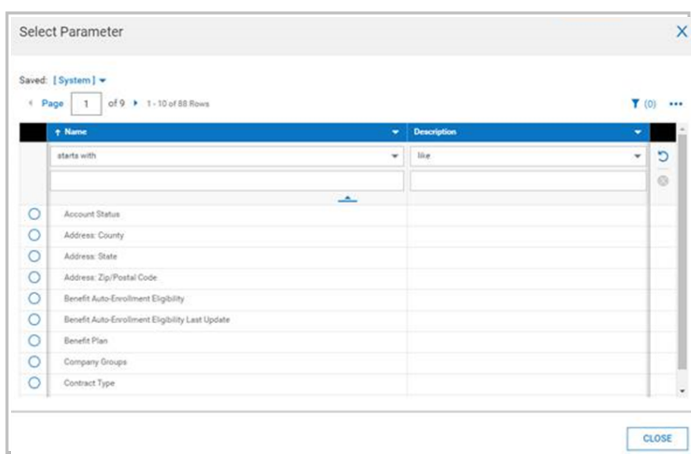


Upon clicking the **+Add Advanced Filter** option, the Advanced Filter popup appears. The Select Parameter field displays by default and the Summary section shows *(Undefined condition)* until a valid condition is specified.

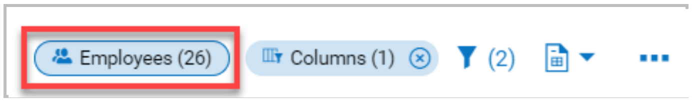
When the user selects a parameter (filter type), then the full condition structure appears and can be configured. Clicking Apply activates the Advanced Filter for the Employee Filter, and the Employee Filter drop-down displays the Advanced Filter value in the Global tab of the Global Filter Panel.





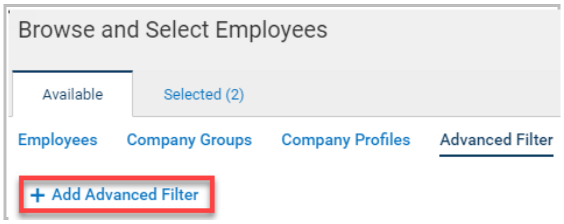


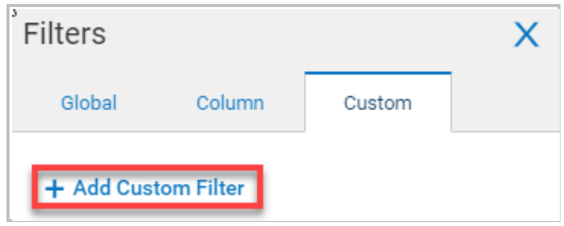
The Advanced Filter also appears in the blue pill of the report header.



Advanced Filter and Custom Filter (Desktop)

146416: Users can open the Advanced Filter upon clicking on the **Add Advanced Filter** button and can open the Custom Filter by clicking on **Add Custom Filter**. Users can then use the **+Add** button to select the parameters for the Advanced/Custom filter.



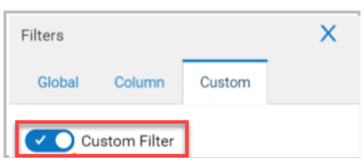


Advanced and Custom Filters – Mobile Application (Mobile)

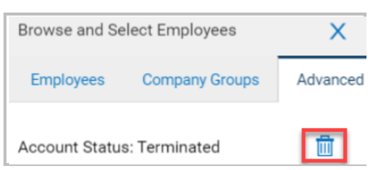
159996: On Mobile devices, the Advanced Filter and Custom Filter behave the following way:

- **Create & Edit Filter** - On mobile devices, the Advanced Filter and Custom Filter do not provide the ability to Edit and Create a new filter. If no filter is already configured, when a user opens the Advanced Filter tab or the Custom Filter tab on a mobile device, the message *No Custom(/Advanced) Filters are available*.

- **Switch Filter On/Off** – Users can switch Custom filters on/off, preserving the filter condition.



- **Delete Filter** Users can remove/delete an Advanced Filter configuration on a mobile device.



Complex Employee Lookup (Desktop)

149310: Users have Advanced Reporting capabilities when they perform employee selection so that they can quickly find the proper employee(s) to perform an action.

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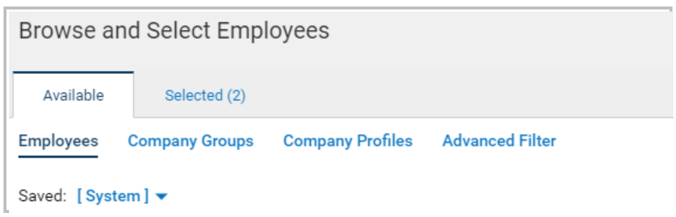
The Available tab includes:

- (Available) Employees
- Company Groups
- Company Profiles
- Advanced Filter

The Selected tab includes the selected data. Users select employee(s)/groups, then click **Add To Selection**/**Apply**, and the selected employee(s)/group(s) move from the Available tab to the Selected tab.

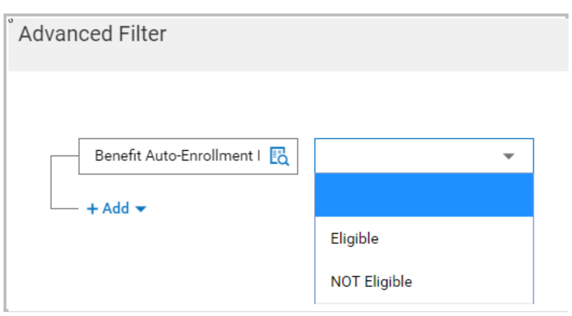


Advanced Filter Criteria (Desktop)

Employee Filter: Drop-Down Selector (Employee Type, Pay Type, etc.) (Desktop)

144687: Users can set the Benefit Auto-Enrollment Eligibility, Contract Type, EIN, Employee Type, and Pay Type in the Advanced Filters tab of the Employee Filter.

- **Drop-Down Selector Types Setup** - When the Employee Filter is provided in a report and a user adds a type, then the Type lookup is opened, the types are listed as:
- **Benefit Auto-Enrollment Eligibility** - Allows users to filter the report by the eligibility value set for the employee.
- **Contract Type** - Allows users to filter the report by the contract type.
- **EIN** - Allows users to filter the report by EIN.
- **Employee Type** - Allows users to filter the report by employee type (such as exempt, non-exempt, contract, etc.).
- **Pay Type** - Allows users to filter the report by hourly, salary, etc. pay type values.



NOTE: Each Profile is available based on modules/features enabled or multi-EIN is configured.

Employee Filter Advanced Filter for No Match (Desktop)

156603: Users can set an Advanced Filter to retrieve no account, so that when the report loads it will not take a possible extended amount of time to load all available records. When a user selects the *No Match* filter type, then:

- It appears with the label *No Match* in the filter condition.
- The Filter Summary Expression is *No Match*.

When the filter is applied, it returns no accounts in the results.

Employee Filter: Advanced Filter - All Lookups (Desktop)

145346: Users can set Lookup types in the Advanced Filters tab of the Employee Filter when the following criteria are met:

- The Employee Filter is provided in a report and a user adds a type.
- At least one group is created in an EIN.
- At least one Account Custom Field is enabled for an EIN.
- At least one manager level is enabled for an EIN.
- At least one Shift Premium Definition is enabled for an EIN.
- At least one Union definition is enabled for an EIN.
- At least one Working Time Regulation is enabled.

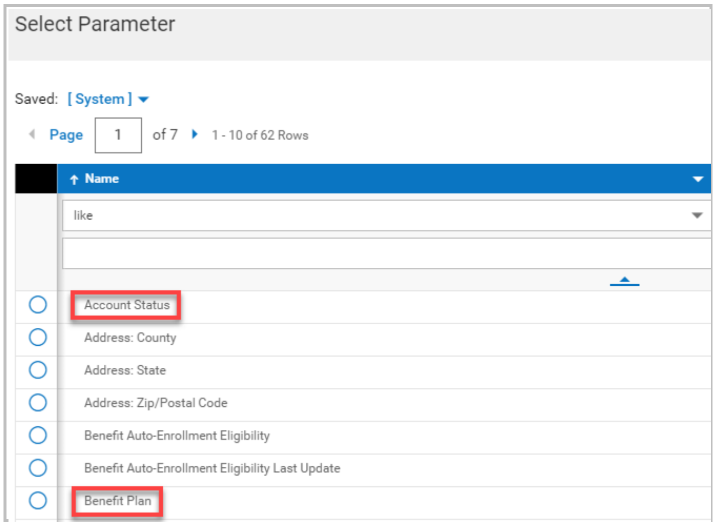
The following Lookup types can be configured:

- **Company Groups** - Allows users to filter the report by a company group.
- **Custom: ##(Name of Account Field)** - Allows users to filter the report by an Account Field tied to an employee's EIN account.
- **Manager: ##(Name of Manager Level)** - Allows users to filter the report by a Manager Level tied to an employee's EIN account.
- **Specific Account** - Allows users to filter the report by one employee's Account.

Employee Filter: Advanced Filter based on Account Status and Benefit Plan Filter Types (Desktop)

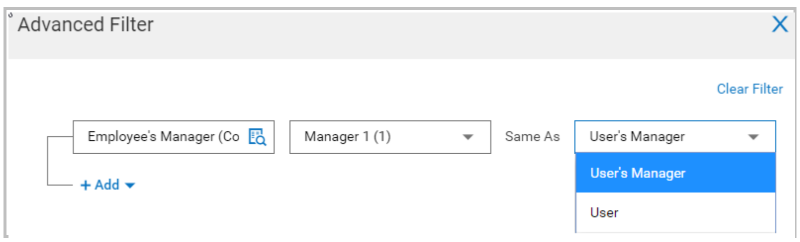
146409: Users can set Account Status and Benefit Plan as filters in the Advanced Filters tab of the Employee Filter.

- **Account Status** - Allows users to filter the report by the account status of an employee, such as Active or Terminated.
- **Benefit Plan** - Allows users to filter the report by a selected Benefit Plan.



Employee Filter: Advanced Filter based on Employee's Manager (Compare to Current User) (Desktop)

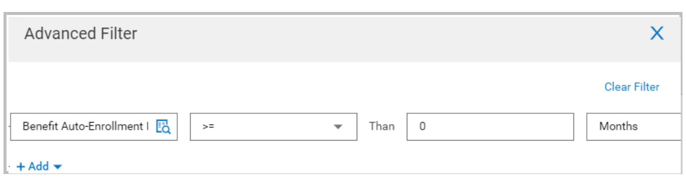
149401: Users have the option to choose **Employee's Manager (Compare To Current User)** as an Advanced Filter to return all employees who report to the user who is logged in or the same manager as the user who is logged in.



When the *Same As* is set to **User**, the filter retrieves all employees who report to the user who is logged in as the designated Manager type (Manager 1-6). When **User's Manager** is selected, the filter retrieves all employees who report to the same designated Manager type (Manager 1-6) as the user who is logged in.

Employee Filter: Advanced Filter based on Benefit Auto-Enrollment Eligibility Last Update (Desktop)

156601: Users can set an Advanced Filter condition for the **Auto-Enrollment Eligibility Last Update Date**, which retrieves all employee(s) who become(s) eligible for enrollment on/after/before the specified days/month/years from today.



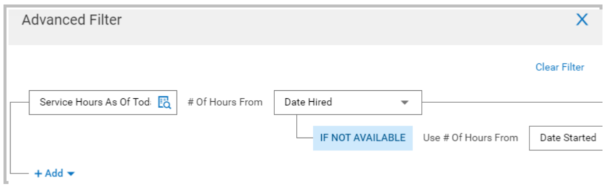
Employee Filter: Advanced Filter based on Service Hours As of Today (Desktop)

156604: Users can filter accounts by the number of hours accumulated from a certain date until today's date to retrieve data using the **Service Hours As of Today** filter type. Users can specify the Primary Date as:

- Employee's dates:
  - Date Hired

- Date Started
- Birthday
- Seniority Date
- Date Re-hired
- Review Date
- Benefits Date
- Frozen Benefits Date

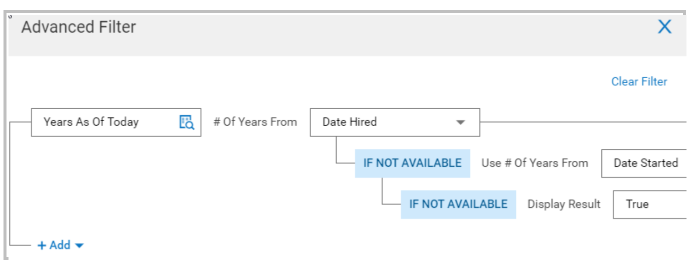
- Custom Date: The list of custom dates is configurable.



Employee Filter: Advanced Filter based on Years As Of Today (Desktop)

153997: Users can set **Years As Of Today** as an Advanced Filter to retrieve employees based on the period of time working for the company. The user specifies a date from the following:

- Employee's dates:
  - Date Hired
  - Date Started
  - Birthday
  - Seniority Date
  - Date Re-hired
  - Review Date
  - Benefits Date
  - Frozen Benefits Date
- Custom Date: The list of custom dates is configurable.



Employee Filter: Advanced Filter for Employee In Between Date X and Y (Desktop)

153829: Users can set the **Employee In Between Dates X and Y** filter to retrieve data for employees whose Day/Month/Year of the specified employee date satisfies the criteria. Users can set the filter to retrieve employees where:

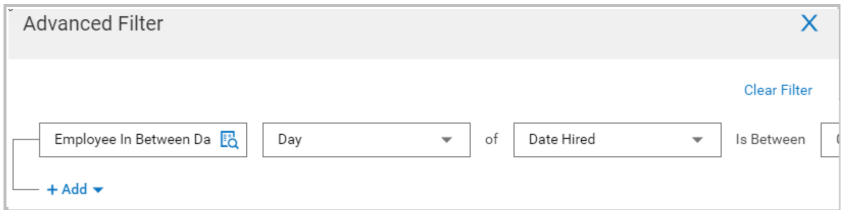
- The day of the specified employee's date is between <value from> and <value to>.
- The month of a specified employee's date is between <value from> and <value to>.
- The year of a specified employee's date is between <value from> and <value to>.

The Employee Date type selector includes the following:

- Employee Dates
  - Hired
  - Started

- Birthday
- Seniority Date
- Date Re-Hired
- Review Date
- Benefits Date
- Frozen Benefit Date

- A configurable list of Custom Dates.

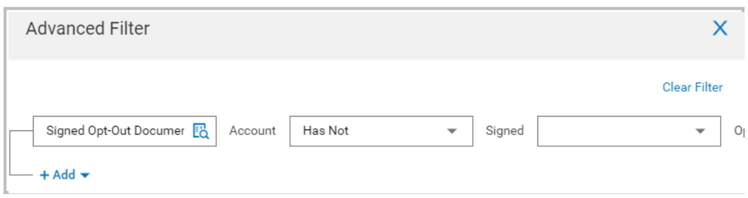


Employee Filter: Advanced Filter for Signed Opt-Out Document (Desktop)

153996: Users can configure a **Signed Opt-Out Document** filter to retrieve a list of employees who have/have not signed the specified Opt-Out Document type.

Users specify Accounts that:

- Have signed the Opt-Out Document
- Have Not signed the Opt-Out Document



Employee Filters - Additional Types Added (Desktop & Mobile)

149400: Users can now set additional filter types in the Advanced Filters tab of the Employee Filter tab. When an Employee Filter is provided in a report and a user adds a type, the Type lookup opens and lists the following types:

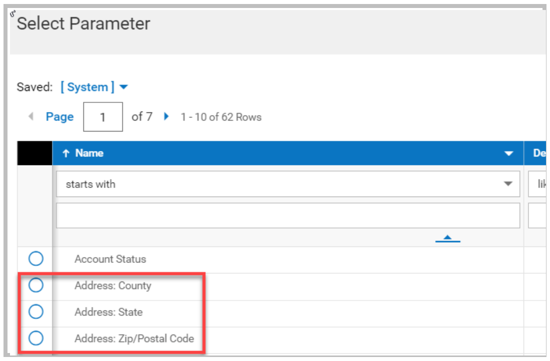
- **Is Female** - Allows users to filter the report by an employee's demographic value of female.
- **Is Locked** - Allows users to filter the report by employees' locked statuses.
- **Is Male** - Allows users to filter the report by employees' demographic value of male.
- **Is Not Terminated** - Allows users to filter the report by employees not terminated (Active, Not in Payroll, etc.) statuses.
- **Is Smoker** - Allows users to filter the report by employees' demographic values of being a smoker.
- **Is Terminated** - Allows users to filter the report by employees' terminated statuses.

Employee Filters - Types Text Field (Desktop)

145339: Users can set the county, state, and zip/postal code in the Advanced Filters tab of the Employee Filter tab where the Employee Filter is available in a report and the user adds a type. When the Type lookup is opened, the fields appear as follows:

- Address: County
- Address: State

- Address: Zip/Postal Code

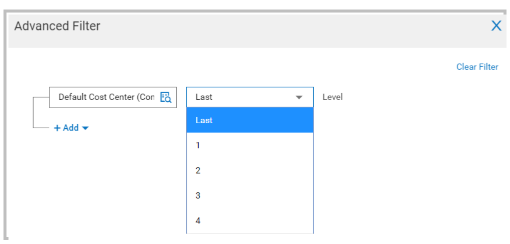


Employee Filters - Cost Center Types (Desktop)

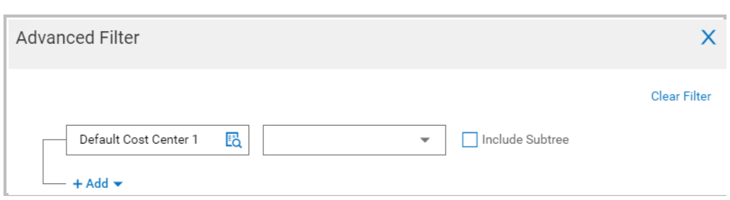
143461: Users can set Default Cost Center types in the Advanced Filters tab of the Employee Filter tab. The **Default Cost Center (Compare To Current User)** selection allows the user who is logged in to retrieve all employees who have the same Cost Center on a defined level of the Cost Center Tree. The filter can be set to level *1, 2, 3, 4*, or *Last*.

For example, if the user has a default Cost Center of *US/California/California South/South Coast*, and the Advanced filter is set for the 3rd level, then the filter results contain all accounts with a default Cost Center of *US/California/California South*. If an account's cost center path does not have a 3rd level (*US/California*) or the 3rd level is different (*US/California/California West*), then the account is not included in the results.

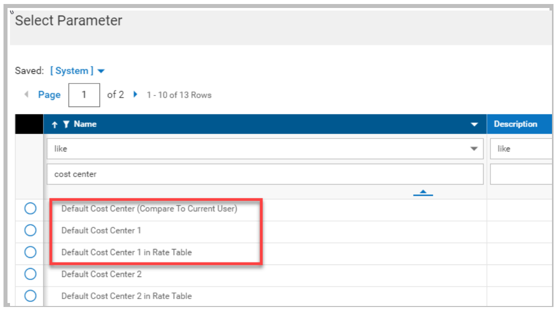
When the filter is set to the last level (*Last*), all accounts with a default Cost Center full path that is the same as the user who is logged in are returned in the results.



Users also have the option to filter on **Default Cost Center** # (1-9**)**. This allows users to retrieve account(s) with the same full path as the one specified in the Advanced Filter for the Default Cost Center #. An option to **Include Subtree** can also be enabled to include accounts with the full path and lower levels than specified in the condition in the filter results. When **Include Subtree** is not enabled, the filter results contain accounts with a strict match to the full path of the Default Cost Center # specified in the Advanced Filter.



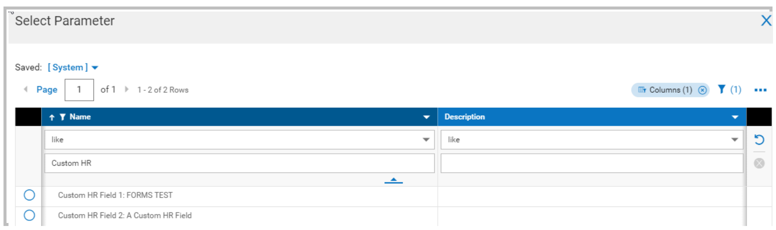
Users can filter on the **Default Cost Center # in Rate Table** (1-9), which allows users to retrieve accounts with a specific Rate Table assignment.



Additionally, users have the option to filter by the **Default Job** (HR), which allows users to filter by the assigned Job value from the Jobs Cost Center Tree. Typically the lowest level in the hierarchy is assigned to the employee.

Employee Filters based on HR Custom Fields Types (Desktop)

143912: Users can set configured and enabled HR Custom Fields in the Advanced Filters tab of the Employee Filter.



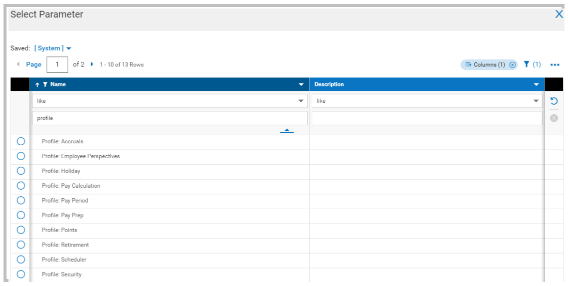
Users can define the following HR Custom Field types to filter by:

- **Characters (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing the characters tied to an HR Custom Value assigned to employees.
- **Currency (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a currency amount tied to an HR Custom Value assigned to employees.
- **Date (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing a date value, such as *December 20th, 2019*, tied to an HR Custom Value assigned to employees.
- **Email (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing an email address tied an HR Custom Value assigned to employees.
- **Integer (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing an integer, a whole number without decimals, tied an HR Custom Value assigned to employees.
- **Link (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a currency value tied an HR Custom Value assigned to employees.
- **Numeric (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a numerical value, including a decimal, tied to an HR Custom Value assigned to employees.
- **System Account (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing an employee account tied to an HR Custom Value assigned to employees.
- **Time (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a time value tied to an HR Custom Value assigned to employees.
- **List-enabled custom field (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing a value from a drop-down list tied to an HR Custom Value assigned to employees. This is applicable for each type above, when "Is list" is enabled and "Allow New" is not enabled.
- **List-enabled custom field, allowing new (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing a value from a drop-down list, including allowing a new value, tied to an HR

Custom Value assigned to employees. This is applicable for each type above, when "Is list" is enabled and "Allow New" is enabled.

Employee Filter: Profiles (Union, Working Time Regulations, Default Shift Premium Types, etc.) (Desktop)

143632: Users can set Profile types in the Advanced Filters tab of the Employee Filter.



Users can define the following Profile types to filter by:

- **Profile: Accruals** - Allows users to filter the report by a selected Accrual Profile.
- **Profile: Counter Distribution** - Allows users to filter the report by a selected Counter Distribution profile.
- **Profile: Holiday** - Allows users to filter the report by a selected Holiday profile.
- **Profile: Pay Calculation** - Allows users to filter the report by a selected Pay Calculations 1 profile.
- **Profile: Pay Calculation 2** - Allows users to filter the report by a selected Pay Calculations 2 profile.
- **Profile: Pay Period** - Allows users to filter the report by a selected Pay Period profile.
- **Profile: Pay Prep** - Allows users to filter the report by a selected Pay Prep profile.
- **Profile: Points** - Allows users to filter the report by a selected Points profile.
- **Profile: Retirement Plan** - Allows users to filter the report by a selected Retirement Plan profile.
- **Profile: Scheduler** - Allows users to filter the report by a selected Scheduler profile.
- **Profile: Employee Perspectives** - Allows users to filter the report by a selected Employee Perspectives profile.
- **Profile: Security** - Allows users to filter the report by a selected Security profile.
- **Profile: Time Off Planning** - Allows users to filter the report by a selected Time Off Planning profile.
- **Profile: Timesheet** - Allows users to filter the report by a selected Timesheet profile.
- **Profile: Work Schedule** - Allows users to filter the report by a selected Work Schedule profile.
- **Union** - Allows users to filter the report by a Union definition tied to an employee's EIN account.
- **Working Time Regulations** - Allows users to filter the report by a Working Time Regulation definition tied to an employee's EIN account.
- **Default Shift Premium** - Allows users to filter the report by a Default Shift Premium tied to an employee's EIN account.

If the Company Profile Advanced Filter is applied and saved, and a profile used in the Filter Condition is removed, then:

- The filter is preserved.
- *< Profile: Name (Deleted)>* displays in the filter expression.
- *< Profile: Name (Deleted)>* shows in the condition, while in the lookup field it is not visible in the list items. Exceptions are the Counter Distribution and Scheduler Profiles. Due to the approach taken for the deletion of these types, just the name of the profile shows in this case, without (Deleted) state.

NOTE: Each Profile is available based on modules/features enabled or multi-EIN being configured.

Employee Filter: Display Logged-In User in the Lookup List (Desktop)

163085: Managers can select themselves in the Employee Filter so they can share report data about manager and subordinates for auditing (HR Specialist/ Higher Level Management, etc.) purposes. Users can select all subordinates and themselves to build a report for audit and sharing.

If the user who is logged in is not a self-manager, then upon applying the selection, the user cannot view their own data in report. As the report is shared with the HR Specialist/Manager who can access their data, they can view the information.

Employee Filter Tabs/Profiles (Desktop)

Employee Filter Profile Support - Profiles Tab (Desktop)

154520: Users can utilize Company Profiles to more easily define a group of employees to run a report against. Users can select profile(s) to retrieve employees based on data defined on the Company Profiles tab.

Supported Profiles include:

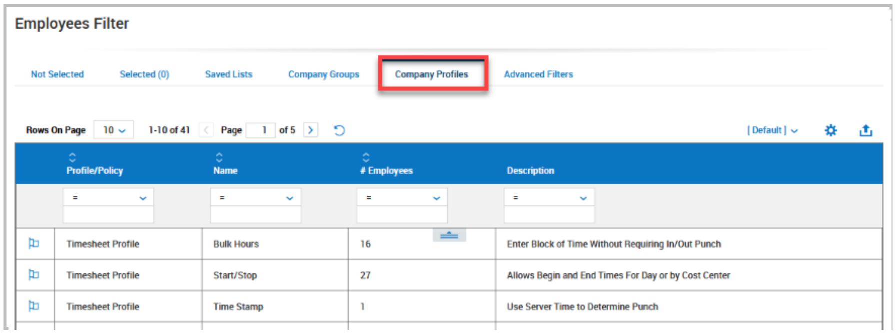
- Timesheet Profile
- Scheduler Profile
- Security Profile
- Accruals Profile
- Holiday Profile
- Pay Period Profile
- Pay Rules Profile
- Pay Calc Profile
- Pay Calc 2 Profile
- Counter Distribution Profile
- Time Off Planning Profile
- Schedule
- Schedule Personal
- Retirement
- Employee Perspectives Profile

Only active profiles display on the Company Profiles tab. Profiles must be assigned to at least one of the user's employees to be visible on the Company Profiles tab, with the exception of the Schedule Personal profile, which is visible even if not assigned to any employees. The # *employees* reflects number of the user's employees with this profile assigned. The user who is logged in is included in the selection if s/he has the profile(s) assigned but is not included in the # *employees*.

When the user selects the profile(s) and clicks *Add to Selection*, the selected profiles appear in the *Selected* tab within the Company Profiles section and disappear from the Company Profiles tab. Employees matching the selected Profile criteria also disappear from the *(Available) Employees* tab.

When the user selects the profile(s) and clicks *Apply*, the profiles are automatically added to the selection and the full selection is applied. If multiple profiles are selected, then upon *Apply*, the selection is converted to an employee list. If a mixed selection of profiles is selected together with

Groups/Specific Accounts/Advanced Filters, employees matching the selection criteria disappear from the *(Available) Employees* tab.



Selected Tab & Expand Selection for Profiles Filter (Desktop)

64593: Users can view a Profiles filter applied in the Classic UI environment in the New UI environment on the *Selected* tab and can also add Employees/Groups/Advanced Filter to the selection to retrieve data for the proper employees.

When a user selects a single Profile and applies the filter, the selected Profile is not expanded into a list of employees. In this case, when a new assignment of the Profile appears or an existing assignment is removed, it immediately affects the filter correspondingly (the employee is added or removed from the filter).

Users can expand a Profiles filter applied in an employee list upon clicking *Expand All to Employee List*. **NOTE**: A single selected profile cannot be expanded into an employee list; only all selected profiles at one time. If a user expands a profile to a list of employees, the filter will retrieve only those employees who currently have that profile assigned. If employees are assigned/unassigned the profile, they do not impact the filter applied.

- Users can select Employee(s)/ Group(s)/ Advanced Filter in addition to the Profiles filter configured in the Classic UI environment. When the user hits *Apply*, User will see only those employees from selected Profiles which the user has access to according to his/her security permissions.
  - Employees from the *Employees* list who are selected manually, employees from *Groups* and *Profiles* are merged into a single list. If the same employee is included in a group and profile or selected manually, then s/he displays only once in a merged list of employees.
- The *Company Profiles* table will disappear from the *Selected* tab and Profiles become visible again in the *Company Profiles* tab of the Employee Filter.
  - In this case when a new assignment of the profile appears or an existing assignment is removed, this does not impact already configured employee filters based on the Profile(s).
  - If a user makes a mixed-selection of profiles together with Groups/Specific Accounts/Advanced Filters, employees matching selection criteria will disappear from the *(Available) Employees* tab.

Employee Filter Profile Support - Remove from Selection (Desktop)

154521: When a user removes a Company Profile from the Selected tab, then it appears on the Company Profiles tab. If a user cancels the lookup page after removal of the Company Profile from selection, then the Company Profile remains among those selected.

Profile/Policy	Name	# Employees	Description	Actions
Timesheet Profile	Bulk Hours	14	All company employees	
Timesheet Profile	Start/End (All Days)	2	Start/End timesheet profile	
Security Profile	Department Manager	44	Limited access to time entry and accruals long description limited access to time entry and accruals	

New UI: Platform

Search Results Quality (All Environments)

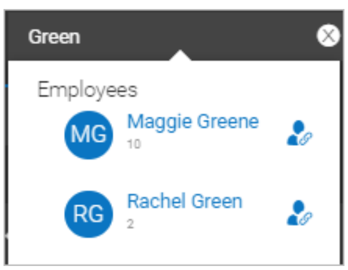
152591: We have improved the list of options returned when doing search in the Search box. For example, when searching on the term *audit*, a user looking for a report with the name that includes *audit*, previously returned a large number of non-relevant results due to other administrative areas of the system containing the same word. Users will now see the most relevant results at the top of the list, such as reports first, and other configuration areas after.

Saving of Search Results (All Environments)

147202: When users use the Search box, select a search item and return to the Search box, the last search results will be saved when users place their cursor in the field. The search results will be saved for the logged in session only and for the same browser. The X icon will allow the search criteria to be cleared.

Updates When Searching Employees (Desktop & Mobile)

150209 & 150870: When using the Search box to search for employees, a visual representation of the employees will display, along with quick links. The employee name will display as a clickable link, along with either their profile picture, or employee initials (if no picture is on file.)



Report Based Single Select Employee Lookup (Desktop & Mobile)

154897: Simple table based Single Select Employee Lookups have been replaced with report based Single Select Employee Lookups throughout the system.

Report Based Multi-Select Employee Lookup (Desktop & Mobile)

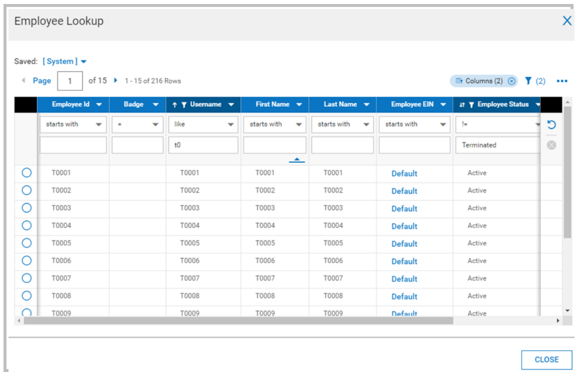
154967: Simple table based Multi-Select Lookups have been replaced with report based Multi-Select Lookups throughout the system.

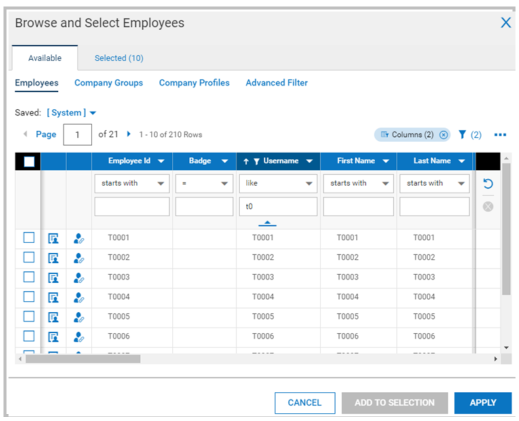
Simple & Complex Employee Lookups Width (Desktop & Mobile)

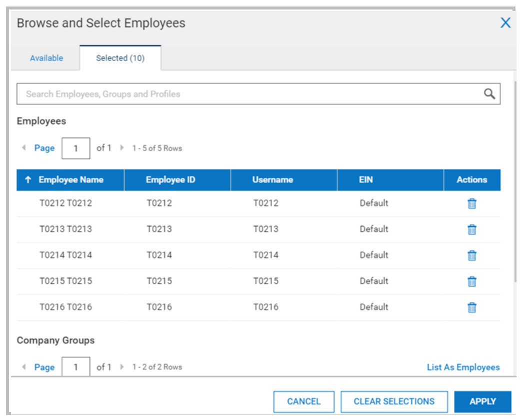
163087: The Simple and Complex Employee lookups width is extended to 1280px in case screen resolution is 1400px and more.

Single and Multi-Select Lookups: Report Table Based (Desktop)

147253: Users now have advanced reporting capabilities when performing single or multiple object selection, allowing them to quickly find the proper object(s) to perform an action. Users can perform single employee select upon clicking on radio-button in the corresponding employee row and clicking on one or more checkboxes for multiple employee selection.







The following Actions are supported by reports in the lookup:

- Refresh
- Reset
- Save View
- Save View As
- Manage Views
- Sort/Multi-Column Sort
- Add/Remove Columns/Export
- Export Settings
- Print

Users can filter the list of items by column using an inline filter area (expanded/collapsed state is determined by the Saved View; it is expanded by default) or by using the Global Filter panel.

When a user makes a selection in single select/multi select lookup, when the user switches to another view, the previously made selection is cleared.

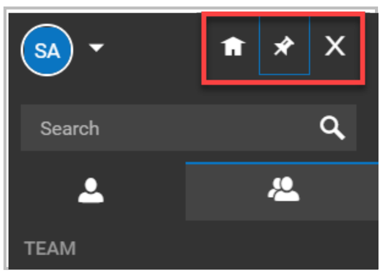
- In a Multi-Select lookup, when a user makes a selection of some item(s)/account(s) within one view and then switches to another view, the previous selection is cleared upon switching the view. Only the selection made in the current view is applied when the user clicks Apply.

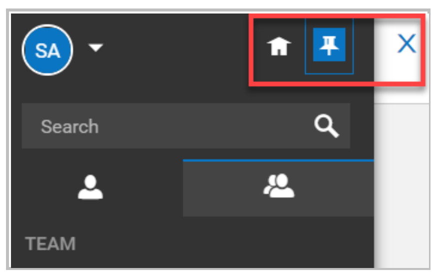
  - For single-select lookup, when the user makes a selection on one page and then switches to another page and makes a selection, the latest selection overrides the previous selection.
  - For multi-select lookup, when the user makes selections on different pages, then all items selected on all pages are included in the selection.
- When a user applies the selection, opens the lookup again and switches to another view, the user sees no selection. The view returns back to the default view, and the user sees no selection. If the user closes the lookup in this case, the original selection(s) is preserved unless the user hits **Apply**. In this case, the original selection(s) are lost.

NOTE: In an Internet Explorer browser, when a user adds more than 15 columns, a message displays explaining that not all columns are visible in IE, but the user can see all columns in another browser. This limit is only applicable to IE browsers.

Pinned Menu Option (Mobile)

84584: Users can pin the main menu so they can load different pages within the system by simply clicking on options within the menu. The menu is pinned for just one log in session, and when the menu is pinned, the display is moved to the right to prevent overlay and the Close (X) button is outside of the menu. The Home icon remains to left of the pin icon.





The display on the Mobile App is determined by resolution

Pinned Menu Function Beyond Log In Session (Desktop)

155479: When the main menu is pinned, the pinning remains beyond just the login session so users do not need to reset it every time. When users log in a second time, the menu is still extended. If the menu is not pinned open, then when users log back in, it is still collapsed.

If the menu is pinned open and the page is refreshed, the menu is pinned open after the refresh.

Prompt User for Review/Rating (Mobile)

153378: In the Mobile Application, the user is presented with the review/rating prompt after a trigger occurs where s/he can successfully enter a rating and add comments. Upon a successful first punch out or first change of cost center (can result in a punch in or punch out), or a simple punch (can result in a punch in or punch out) from the Timesheet or the clock widget will trigger the review/rating prompt. If this is not done after the first 5 minutes of active or idle time, then when a user navigates to another page, the trigger occurs.

Typically, the popup is displayed upon triggering each time unless the following selections are made:

- The popup is not displayed during the current session after the user chooses *No, Thanks*.
- The popup is not displayed until the mobile app is re-installed or the cache is cleared after *Rate It Now* is chosen.

- The popup is displayed upon the next trigger after *Remind Me Later*.

Update Menu Picture in the Hamburger Menu (Mobile)

156612: The Picture component within the Mobile experience has been updated and now uses a circle rather than a square. Pictures almost in all places have no border and do not support navigation to employee profile, as usually there is an employee name next to the photo which serves as a link to employee profile.

Hide/Disable Back Button After Login (Mobile)

147245: The Back button is disabled on the landing experience for any first page configuration or navigation back to the Homepage to prevent users who just logged in from being logged back out upon clicking on the Back button.

Feature Retirements

The tables below document functionality that has been retired or is planned to be retired. These tables will be updated as needed with every system release.

Retired Features

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
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*	December 2019

				Overview	
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
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

Human Resources

Benefit Plans

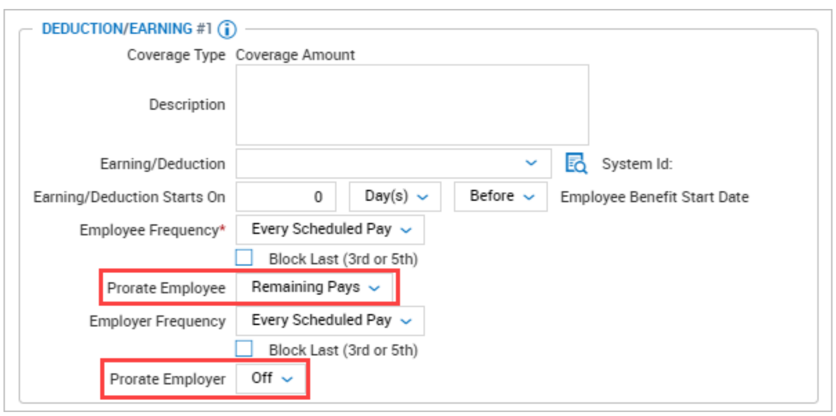
Prorate Settings Added to Deduction/Earning in Coverage Based Plans (Classic UI & New UI)

110250: For Coverage Based benefit plans, two new proration settings have been added to the Deduction/Earning section. The ***Prorate Employee*** and ***Prorate Employer*** settings provide two options: ***Remaining Pays*** and ***Off***. When set to *Remaining Pays*, the system will prorate an HSA or FSA deduction based on the remaining pay periods left in the year.

For example, if a new employee hired in the middle of August enrolls in an FSA for $1000 and there are 11 pay periods left in the year, the system will take the $1000 election and divide by 11 pay periods. $1000/11 = $90.91 per pay period.

NOTE: The proration settings will not work if the employee has no Pay Period Profile assigned, as the system would have no way of knowing how many pay periods are left.

If an existing benefit plan is using an existing prorate function that was already in place prior to this release, those plans will continue to use the old function until you edit the plan to use the new function. Once edited to use the new proration method, you will not be able to switch back to the old method.

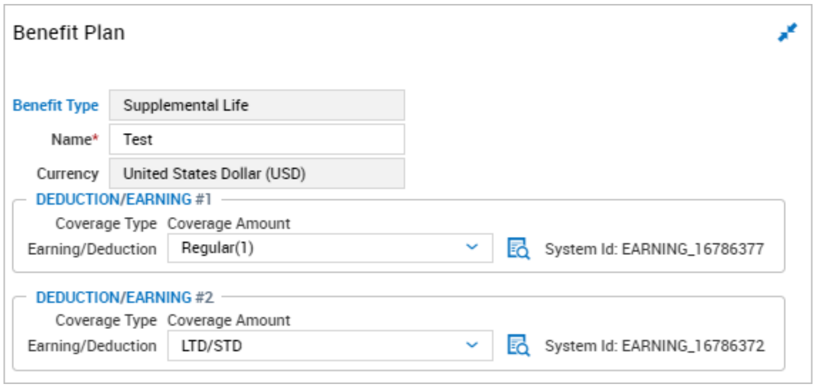


Change to Editing Earning/Deduction Codes in Benefit Plans (Classic UI & New UI)

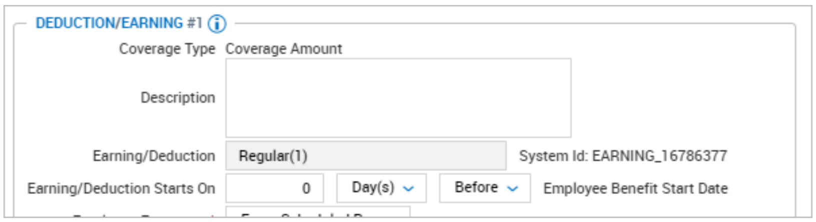
102536: In a previous release, we added the ability to change an Earning or Deduction code on a benefit plan even if it was already assigned to employees. Because the ability to do this resided at the child (sub-plan) of the benefit plan, it was possible to accidentally delete a code which then affected the parent level of the benefit plan.

To prevent accidental deletion of Earning or Deduction codes in these cases, only the parent benefit plan can now be edited. The Earning and Deduction fields in the child plans will be grayed out.

Benefit Plan (Parent) – Can change Deduction/Earning and will flow out to child



Edit Plan (Child) – Earning/Deduction grayed out



Affordable Care Act (ACA) (Classic UI & New UI)

1095-C Forms Added For Employees: Nonemployee for Part of the Year (Classic UI & New UI)

159600: When users chose the **Mass Add For Selected Year** option for the Form 1095-C, the system determined the employees who should receive a Form 1095-C for that year. The identification process did not include individuals who were assigned to the Non-Employee ACA Profile for part of the year and assigned to an active ACA Profile for the other part of the year.

The system no longer excludes those employees in the process, and a Form 1095-C now generates for them along with all other employees who meet the criteria. The system will Mass Add a 1095-C Form for any employees with an ACA Status of FT for at least one month of the selected year, as well as any employees who do not have an ACA Status of FT but who are enrolled in a self-insured medical plan during the selected year.

Employee Information

Auto Update PP in Year Not to Impact Historical Base Compensation Records (Classic UI & New UI)

151395: In the February 2020 system release, a new global setting was introduced to automatically update the *PP In Year* value in base compensation when pay period profiles are changed. When this is enabled, by default, only the top-most (current) base compensation *PP In Year* values are updated when pay period profiles are changed.

When editing historical base compensation records, the *PP In Year* value was automatically updated to inherit the current pay period profile value. This can create an instance where a user updates an historical record's rate or effective date but does NOT want the *PP In Year* value updated.

To ensure this does not happen, when *Auto Update Base Compensation PP In Year* is enabled globally and users are editing historical, non-current base compensation records, the *PP In Year* value will not be updated and will remain as it was originally entered.

HR Actions

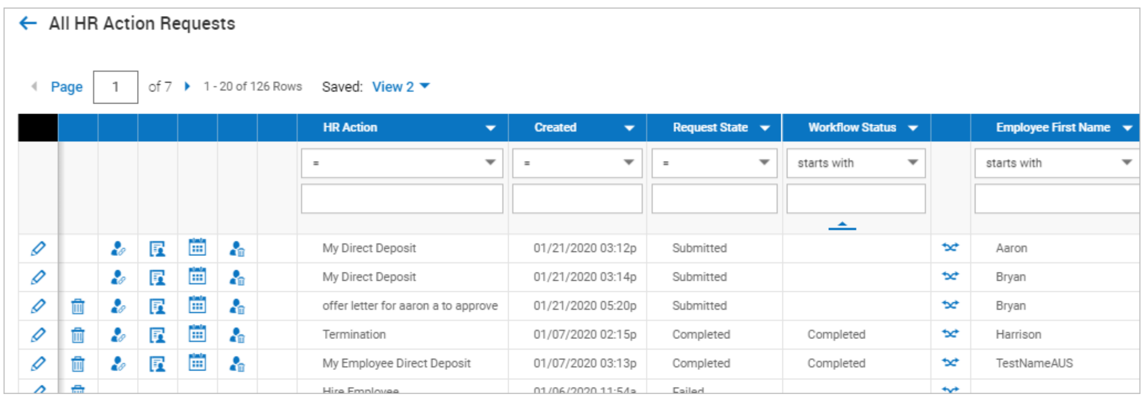
My Information Action Request Added to All HR Action Requests Report (Classic UI & New UI)

161124: In the ***All HR Action Requests*** report, we will now show data for the ***My Information Action Request*** HR Actions, including history, pending, and future dated items.

Having this information available will help users by creating an audit trail for certain items and reviewing for mistakes. Previously, only information for the *My Employee Action Request* displayed in the report.

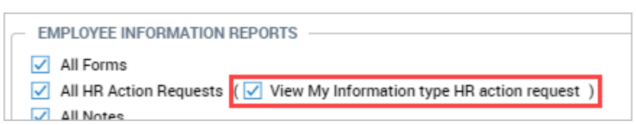
The report is located under *My Info > My Reports > HR Reports > Employee Maintenance > All HR Action Requests*.

Important Note: This functionality was released in the February 2020 system release under 76084 and was later reverted (removed) until certain issues could be resolved. They have now been resolved and the functionality is available in this May 2020 release.



The security setting controlling access to this report has been updated as well.

On the *Reports* tab of security profiles, in the *Employee Information Reports* section, a new ***View My Information type HR action request*** setting has been added to the ***All HR Action Requests*** setting. When checked, users will be able to see the *My Information Action Request* data in the report.

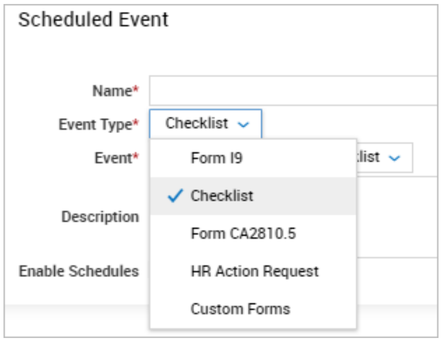


HR Setup – Scheduled Event

Employee Checklist Added to Scheduled Events (Classic UI & New UI)

145330: We have added ***Checklist*** as a selection in the *Event Type* drop-down for scheduled events, configured under *Company Settings > HR Setup > Scheduled Event*. Once selected, an *Event* drop-down will display where users can select from a list of checklists.

This option will allow companies to schedule an event for checklists, assign the event to one or more employees, and if needed, schedule the event.



Imports

Manager Fields Added to Employee Job History Import Template (Classic UI & New UI)

18156: In the ***Employee Job Change History*** import template, we have added the ***Manager 1-6*** fields to the template to support the importing of these fields into the *Job Change History* widget of employee accounts. These fields will include manager fields for Multi EIN and single companies. The template is located in the *HR* category under *Company Settings* > *Imports* > *Overview*.

Manager 1				Y	Employee Id, Full Name, or Username
Manager 2				Y	
Manager 3				Y	
Manager 4				Y	
Manager 5				Y	
Manager 6				Y	
Manager 1 EIN Tax Id					For Multi-EIN only. This field is used when it's impossible to identify manager based on Employee Id, Full Name, or Username.
Manager 1 EIN Name					
Manager 2 EIN Tax Id					
Manager 2 EIN Name					
Manager 3 EIN Tax Id					
Manager 3 EIN Name					
Manager 4 EIN Tax Id					
Manager 4 EIN Name					
Manager 5 EIN Tax Id					
Manager 5 EIN Name					
Manager 6 EIN Tax Id					
Manager 6 EIN Name					

Total Deductions Added to External Pay History Import Template (Classic UI & New UI)

153561: In the ***External Pay History*** import template, ***Total Deductions*** has been added. This is available in both the Excel and Excel 2007 templates. The templates are located in the *Payroll* category under *Company Settings* > *Imports* > *Overview*.

Pay Period End Date	mm/dd/yyyy	End of the pay period for the Pay Statement
Total Gross Pay		Enter only number without currency symbol.
Total Deductions		Enter only number without currency symbol.
Total Tax		Enter only number without currency symbol.

Additionally, ***Total Deductions*** has been added as an available column that can be pulled into the ***Pay Statement History (Imported)*** report, located under *Team* > *Payroll* > *Reports* > *Pay History*.

Multi EIN & National ID

Removal of Overriding Permission for Primary National ID Type

151706: Managers will now be able to hire an employee in a Multi EIN company according to the permissions set for the Primary National ID Type in the user's security profile. Previously, the system allowed overriding of the user's permissions and followed the same process as Social Security Numbers; i.e., if a user didn't have permission to view/edit the SSN, they could still hire an employee because SSN was required for hiring.

Notifications

Tag Added to 'Applicant Applied For Job' Notification (Classic UI & New UI)

153737: In the *Applicant Applied for Job* notification, a new **Applicant ID** tag has been added and can be used when writing the message in the *Email/Mailbox Message* widget. When adding the tag, the applicants assigned ID will be included in the resulting email.

Reports

Skills Report Page: New 'Is Schedulable' Column Added if Using Scheduler Module (Classic UI & New UI)

152460: To allow users to sort and filter the Skills report page by schedulable skills, a new ***Is Schedulable*** column is now available in the report. The Scheduler module must be enabled, and the column will be in the report by default. Column values are Yes or No. For HR and TLM, the report page is under *Company Settings > HR Setup > Skills. For Scheduler, the report page is under Company Settings > Scheduler Setup > Skills.*

Workflows

Additional Tags Added to Generate Notification Step in HR Action Workflows (Classic UI & New UI)

132094: In HR Action workflows, the Generate Notification step has been updated with additional tags, so more information is automatically populated without users having to find and add it manually.

The following new tags populate information from Employee Information:

- *Employee Id*
- *Account Extra Fields (separate tags for account extra fields 1 to 10)*
- *Employee Primary Email*
- *Employee Secondary Email*
- *Worker Type*
- *EIN*
- *Hired Date*
- *Started Date*

The following new tags populate information from the HR Action:

- *HR Action Name*
- *Termination Date*
- *Termination Reason*
- *Termination Notice*
- *Termination Notes*
- *Default Cost Centers (separate tags for cost centers 1 to 9)*
- *Employee Type*
- *Managers (separate tags for managers 1 to 6)*

- *Pay Grade*
- *Account Status*

The following new tags populate information from the HR Action:

- *HR Action Name*
- *Termination Date*
- *Termination Reason*
- *Termination Notice*
- *Termination Notes*
- *Default Cost Centers (separate tags for cost centers 1 to 9)*
- *Employee Type*
- *Managers (separate tags for managers 1 to 6)*
- *Pay Grade*
- *Account Status*

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	Desk-top	Mobile
114018 (EPIC) 119047	HR	HR Actions EIN Transfer	*Team > HR > HR Actions Available Tab > Click Start*	Transfer employees from one EIN to another. Employees in EIN Selection of Terminated employees	Yes	Yes
114018 (EPIC) 119049	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions* *Team > HR > HR Actions*	Upon *Submit*, workflow starts To Do Items (Approve/Reject / Modify) supported Supported standard fields include: Date Hired, Name,	Yes	Yes

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
				Started, Pay Period Profile, Personal Settings (these fields are pre-filled with data from employee's current EIN record) Large list of additional items can be added, as in other HR Actions.		
114018 (EPIC) 119544	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions* *Team > HR > HR Actions*	***Primary EIN*** with drop-down added to EIN Transfer	Yes	Yes
114018 (EPIC) 119538 119539	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions* *Team > HR > HR Actions*	***Deductions & Earnings*** *HR Action Item Added to* EIN Transfer	Yes	Yes+
114018 (EPIC) 119542	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions* *Team > HR > HR Actions*	***Termination Details*** *Added to EIN Transfer*		Yes
114018 (EPIC) 119541	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions* *Team > HR > HR Actions*	***Job Change History*** *Added to EIN Transfer*		Yes
114018 (EPIC) 119543	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions* *Team > HR > HR Actions*	***Inventory Profiles*** *Add to EIN Transfer*	Yes	Yes

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
114018 (EPIC) 119051	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions Team > HR > HR Actions*	***Incidents History*** *Add to EIN Transfer*	Yes	Yes
114018 (EPIC) 161811	HR	HR Actions EIN Transfer	*Company Settings > HR Setup > HR Actions Team > HR > HR Actions*	***EIN Transfer Item for HR Actions*** *The 'Required' checkbox has been disabled for: Account Checklists Account Checklists History Incidents History Job Change History Termination Details History*	Yes	Yes
144429 (EPIC) 147868	HR	Benefit Plan in HR Action	*Company Settings > HR Setup > HR Actions Team > HR > HR Actions*	***Hire HR Action Adding Benefit Plan during hire process*** *Account Contacts updated to New UI*	Yes	Yes
144429 (EPIC) 148347	HR	Benefit Plans	*Team > Benefits > Benefit Plans*	*Account Contacts updated to New UI (adding & editing)*	Yes	Yes

New UI: Benefits

Requested Amounts Added on Benefit Change Request PDF

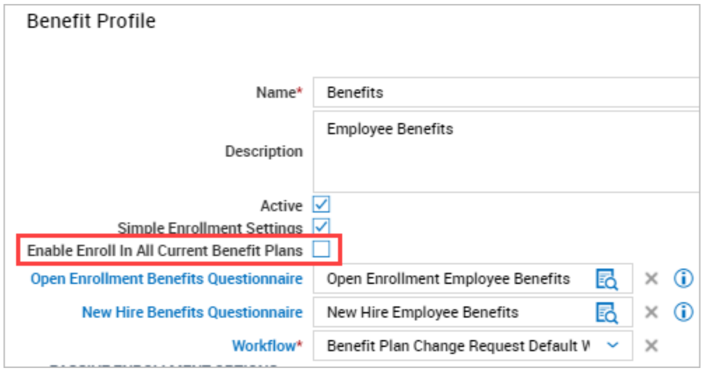
141133: In the PDF available from the benefit Change Requests Detail page (*Team > Benefits > Enrollment Requests* - exporting as PDF), any Guaranteed Amounts will now be included in the resulting PDF. Previously, they were not included.

Benefits Enrollment – New Selection Option

125029 & 137460: A new benefit selection option is available to employees that allows them to select all current plans configured with Use Units or EOI options. Previously, if a benefits plan required the selection of units or EOI, the option to select all current plans was disabled. Now, employees can select this option, so they won't have to individually re-select their plans.

This option can be controlled. A new **Enable Enroll In All Current Benefit Plans** checkbox has been added to the Benefit Profiles maintenance page.

- When checked, anyone assigned to that benefit profile will see the option to enroll in all current benefit plans during their open enrollment (no need to select each plan if no changes.)
- When unchecked, the option to enroll in all current plans will be hidden from all employees assigned to that benefit plan profile.
- The option will be unchecked by default.



EOI Settings Added to Coverage Amount Based Benefit Plans on Coverage Levels w/o Units

127225: Benefit plans based on coverage amount not requiring the use of units can now be configured with EOI settings at the coverage level(s). Three new checkbox options are now available in benefit plan coverage levels for Coverage Amount based benefit plans:

- Require Evidence of Insurability for Open Enrollment
- Require Evidence of Insurability for New Hire Enrollment
- Require Evidence of Insurability for Life Change Event

The benefit plan types are:

- Coverage Amount
- Coverage Amount/Age
- Coverage Amount/Age of Dependents
- Coverage Amount/Age of Spouse

The following can be expected:

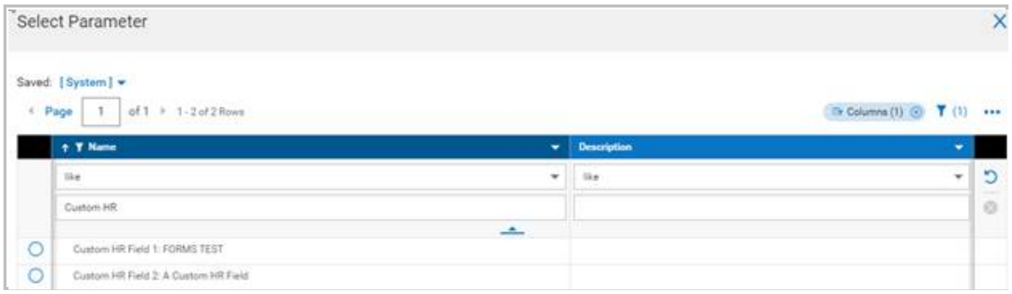
- If any of the checkboxes are checked in the EOI Settings on the coverage level, the *Guaranteed at* option will be disabled.
- If the *Guaranteed at* option is enabled, the three new checkboxes for EOI will be disabled. Users can only configure either the *Guaranteed at* or the EOI settings.
- If the *Use Units* option is checked at the benefit plan level, the EOI settings will be disabled at the coverage level. If the EOI settings are used at the coverage level, the *Use Units* will not be grayed out, but when users check *Use Units* for a benefit plan level, the options are grayed out for EOI settings at the coverage level. You can use one option or the other, but not both.
- If any of the checkboxes are checked, the plan will require an EOI upload from an employee if they are enrolling in any coverage level using the enrollment type specified in the checkbox(es).

- EOI upload, based on the three checkboxes will be applicable during ESS enrollments but not during the manual addition of plans, or when adding to the employee's record manually, or via import or API.
- In the Benefit Change Request Detail report, the *Is Evidence of Insurability Required* column will contain a Yes if any of the three new checkboxes in non-unit plans are checked.

New UI: Employee Filter

Employee Filters based on HR Custom Fields Types (Desktop)

143912: Users can set configured and enabled HR Custom Fields in the Advanced Filters tab of the Employee Filter.



Users can define the following HR Custom Field types to filter by:

- **Characters (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing the characters tied to an HR Custom Value assigned to employees.
- **Currency (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a currency amount tied to an HR Custom Value assigned to employees.
- **Date (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing a date value, such as *December 20th, 2019*, tied to an HR Custom Value assigned to employees.
- **Email (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing an email address tied an HR Custom Value assigned to employees.
- **Integer (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing an integer, a whole number without decimals, tied an HR Custom Value assigned to employees.
- **Link (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a currency value tied an HR Custom Value assigned to employees.
- **Numeric (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a numerical value, including a decimal, tied to an HR Custom Value assigned to employees.
- **System Account (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing an employee account tied to an HR Custom Value assigned to employees.
- **Time (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by typing a time value tied to an HR Custom Value assigned to employees.
- **List-enabled custom field (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing a value from a drop-down list tied to an HR Custom Value assigned to employees. This is applicable for each type above, when "Is list" is enabled and "Allow New" is not enabled.

- **List-enabled custom field, allowing new (Custom HR Field #:##(Name of HR Custom Field)** - Allows users to filter the report by choosing a value from a drop-down list, including allowing a new value, tied to an HR Custom Value assigned to employees. This is applicable for each type above, when "Is list" is enabled and "Allow New" is enabled.

New UI: Employee Information

Job Title in Employee Information & My Profile Header (Mobile)

166559: In the New UI mobile environment, employee job titles were missing from the Employee Information and My Profile headers and have now been added.

New UI: E-Verify

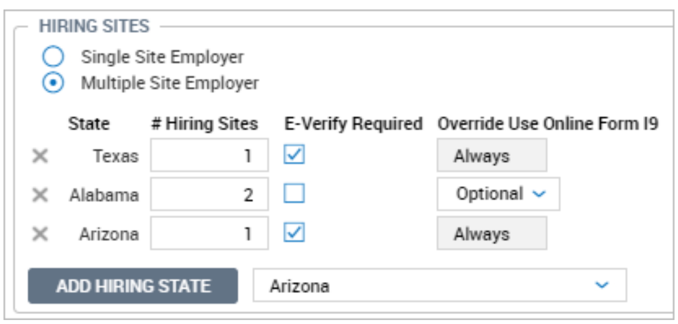
Option Added to Require I9 Document Upload & Prompt for E-Verify (Desktop)

141901: For companies using E-Verify, you can have your managers complete the I9 process in OnePoint HCM and then enforce a step ensuring the completed I9 is sent to E-Verify. We have added new settings for each hiring state that can control the prompting of users in submitting I9 forms to E-Verify.

We have added an ***Override Use Online Form I9*** column in the *Hiring Sites* section of the E-Verify Marketplace Product Settings. This column contains a drop-down for each state added. Options include ***Optional***, ***Always***, and ***Never***. Note that these are the same options available in the *Use Online Form I9* drop-down in the E-Verify Configuration section but are now offered at the state level.

We have also added an ***E-Verify Required*** checkbox for each state listed.

NOTE: In the December 2019 release, this functionality was made available for the New UI Mobile experience. We are now making it available for the New UI Desktop experience in this release.



How the new E-Verify settings work

- States set as required/always will prompt the user, after completing the I9, and be presented with a pop-up to proceed with E-Verify.
- When a new state is added, the *E-Verify Required* checkbox will be automatically checked for that state if any other states are set as required. If no states are set as required, the newly added state will be unchecked/unrequired, and options can be adjusted accordingly.
- For any states set as required, the override column will be set to *Always* and cannot be changed unless the required checkbox is unchecked.

- If the user was forced to upload documents (see above), once uploaded, they will then proceed to E-Verify based on state's settings.

Message When User Navigates Away Without Submitting E-Verify Request

145328: In the December 2019 system release, functionality was introduced so if *E-Verify Required* is enabled for a State in the E-Verify marketplace settings, the user would be directed to the E-Verify Screen after certifying the I9 (via the wizard approach.)

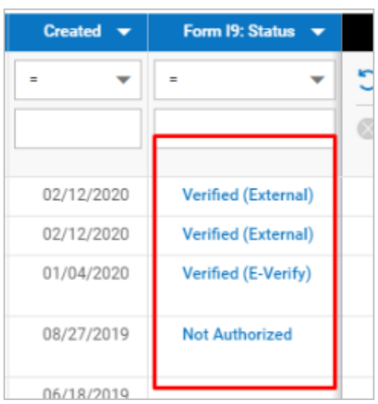
In this release, we are adding behavior in the application to help ensure the user clicks *Submit* on the E-Verify page.

If E-Verify is marked as required when the user is brought to the E-Verify page, they will not be able to navigate away from the page prior to pressing the *Submit* button. If they do, they will receive a message that they must submit the E-Verify to exit.

Verification of Submitted I9 Form Used in E-Verify Cases

149004: In the New UI, the system will now indicate which I-9 form was used in the E-Verify submission process to help users quickly confirm which employee I-9 form was sent to E-Verify.

In the *E-Verify Requests* report page, the *Form I9: Status* column will display the status of the form as links. When the links are clicked, the user will be directed to the submitted I9 form.



New UI: HR Actions

HR Action Item – Deductions (Mobile & Desktop)

78426: The **Deductions** HR Action Item is now available and supported in the New UI for both MSS (Managers) and ESS (Employees).

MSS

This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, Termination, and EIN Transfer. This action item will update the *Deductions* widget in employee accounts and other areas in the system where deductions are supported.

ESS

WFR-91056 This is valid for *My Information Action Request*. When employees receive an HR Action To Do Item they can do things such as adjusting 401K elections, HSA amounts and FSA contributions.

Changing Default and Limit Cost Centers via HR Actions

70947: Previously, when using an HR Action to update or change a cost center limit list or a default cost center, the system would not allow the update and an error message was generated due to the system looking at the current limit list, rather than the updated list. Now, when a limit list and cost center is updated on one HR Action at the same time, the validation will be based on the limit list provided in the HR Action and the update will be allowed.

NOTE: Functionality is dependent on Default Cost Center and Limit Cost Center items being configured in the same HR action Group.

New UI: Position Management

Position Abbreviation Field Expanded

148129: The Position Abbreviation field has been expanded from 12 to 60 characters. This field can be accessed when creating or editing Positions under *Company Settings > HR Setup > Positions*.

Position Reports: Abbreviation and Title Columns Added

148137: Within Position Management reports, the ***Abbreviation*** and ***Title*** fields have been added as available columns within the following reports.

- Employee Assignments (*Team > My Team*)
- Exceptions for Reports To Position (*My Info > My Reports > Team Reports*)
- Position Headcount Detail (*My Info > My Reports > Team Reports*)
- Position Headcount Summary (*My Info > My Reports > Team Reports*)
- Employees Missing Primary Position (*My Info > My Reports > Team Reports*)
- Position History (*My Info > My Reports > Team Reports*)

Position Reports: Primary Position Columns Added to Job Change History Report

151646: Three new Primary Position columns are available to be added to the Job Change History report, located under *My Info > My Reports > HR Reports > Employee Maintenance > Job Change History*.

- Primary Position End Date
- Primary Position Name
- Primary Position Start Date

Position Reports: Primary Position Columns Added to Employee Information Report

151644: Three new Primary Position columns and position data enabled at the company level are available to be added to the Employee Information report page, located under *Team > My Team > Employee Information*.

- Primary Position End Date
- Primary Position Name

- Primary Position Start Date
- All Position attributes enabled in Company Setup

Position Reports: Position Information Added to Termination Details Report

151645: The following columns can now be added to the Termination Details Report. These columns will populate based on the assignment data as of the employee's termination date. Only Primary assignments will display in these columns.

- Primary Position
- Primary Position Start Date
- Primary Position End Date

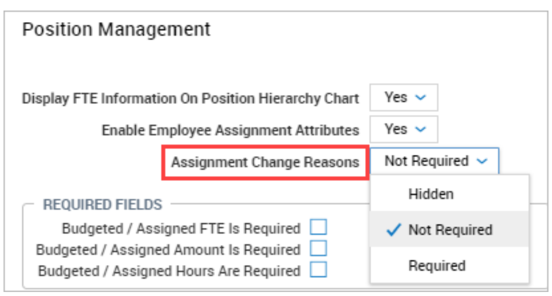
Position Lookups in Assignment Pop Up: Past Dated Assignments

156660: When an employee's Position Assignment is ended with a back-dated Position, any subordinate Positions in effect up to end-dated one will no longer be displayed in the Position lookup within the Assignment pop-up. For example:

- Mary is assigned to Position A as primary - Position A has Positions 1, 2, and 3 as subordinate.
- Mary is also assigned to Position B as non-primary - Position B has Positions X and Y as subordinate.
- If a user end dates Mary's assignment to Position B with a date in the past, the next time Mary logs into the system she will no longer see Positions X and Y as options in the Positions lookup list within the Assignment pop-ups.

Position Imports: Behavior of Assignment Change Reason on Employee Position Assignment Import

141231: When importing the *Assignment Change Reason* field on the *Employee Position Assignment* import template, the system will now look at the value set in the *Position Management* widget in *Company Setup*. This ensures the correct value is assigned or skipped.



Company Setup Values in the Position Management Widget

- **Hidden** – If a value is entered in the import template, the system will ignore it since the value is not to be viewed by the users. If no value is entered in the import template, the system will ignore the value and will not generate an error since the value is to be hidden.
- **Not Required** – If a value is entered in the import template, the system will check the change reasons at the Position level and populate accordingly since the value is not required, nor hidden. If no value is entered in the import template, the system will not generate an error since the field is not required.
- **Required** – If a value is entered in the import template, the system will check the change reasons at the Position level.

- If a valid match is found, the system will populate the value upon importing.
- If no value is entered in the import template, an error will be generated in the import results since this is required.
- If you enter Clear to remove an existing reason code, an error will be generated in the import results since this is required.

Assignment Change Reason Code Added to Rehire Type HR Action

151623: When using the *Rehire* type in HR Actions to hire an employee into a different Position, an ***Assignment Change Reason Code*** can now be applied during the rehire process.

Assignment Change Reason Code Added to Manual Hire

151619: When manually hiring an employee into a Position using the *Hire* option in Employee Maintenance, an ***Assignment Change Reason Code*** can now be applied during the hire process.

Assignment Attributes in HR Actions

151616, 151612, 151614

When using an HR Action to assign an employee into a Position, you can now enter any assignment attributes that might be required. Once the HR Action is approved, the employee record will be updated.

Ensure the following is set: The *Enable Employee Assignment Attributes* field is set to Yes (*Position Management* widget on the *HR* tab, located at *Company Settings > Global Setup > Company Setup*.)

HR Actions Supported:

- Regular
- Hire
- Rehire

New UI: Recruitment – Communication Templates

Errors When Sending Communications with iCalendar Enabled

134820: Previously, when a communication template with iCalendar Attachment enabled was sent from a job requisition or job application, users received an unclear error messages and the message could not be sent. Now when sending a communication with iCalendar Attachment enabled via Email, Mailbox, or SMS, no error message will be generated.

New UI: Recruitment – Job Applications

Button Order Reconfigured on Job Applications Page

153788: The button order on the Job Applications page (*Team > Recruitment > Candidates > Job Applications*) have been rearranged. The new arrangement is valid on the New UI Desktop and New UI Mobile experience. The new order from left to right is:

1. Add Evaluation Questionnaire
2. Update Hiring Stage
3. Communicate

4. View
5. Ellipses – Update Application Rank

New UI: Recruitment – Hiring Stages in Job Requisitions & Templates

147526, 151467, 154574, 149167, 162207, 160915

Background

Up to this system release, all hiring stages applied to all job requisitions and users could not make specific hiring stages enabled or disabled, required, or control and enforce the sequence order in which they were to be completed per each job requisition. Nor could they prevent the applicant from being hired if required hiring stages were not completed.

What we Have Done

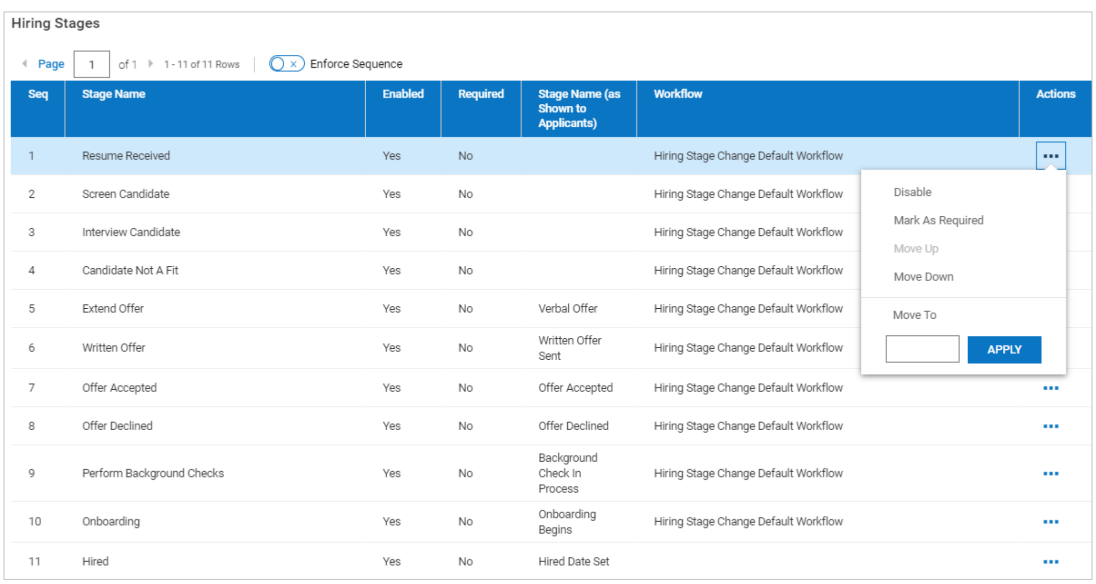
Now, hiring stages have been added to the job requisition level as well, where administrators can control enabling/disabling, editing the sequence order, enforcing the sequence order, and/or marking certain hiring stages as required per each job requisition. We are also allowing you to enforce your users to select a job application when hiring; and only job applications with all required hiring stages completed will show on the pick list upon hiring an applicant.

NOTE: Applicant hiring stages will remain as-is at the global level, meaning there is no sort order or ability to mark as required.

Enhancements & Updates

Hiring Stages Widget Added to Job Requisitions

The ***Hiring Stages*** widget has been added in Job Requisitions. As with the other widgets, a jump link in the side panel is available. This is also available for Job Requisition Templates and the same options and criteria that apply to Job Requisitions also apply to templates.



- Hiring stages from the global level will appear in this widget.
  - Hiring stages are created under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Hiring Stages*.

- Any edits or additions to existing hiring stages at the global level will update only new job requisitions. Existing job requisitions will not be updated so all applications tied to a job requisition go through the same experience.
- Any edits or additions to hiring stages at the global level will affect all job requisition templates (except sort order). For example, if a hiring stage is renamed, when a user selects the template in creating a job requisition, the template will contain the new name. A warning message will display to inform users when editing. When adding a new hiring stage to a template, it will display at the bottom of the list and be disabled. You can then enable it and move it to the desired sequence.
- Deletion of hiring stages is not allowed if they are enabled in a job requisition or job requisition template. If disabled, deletion is allowed if there are no job applications tied to it.

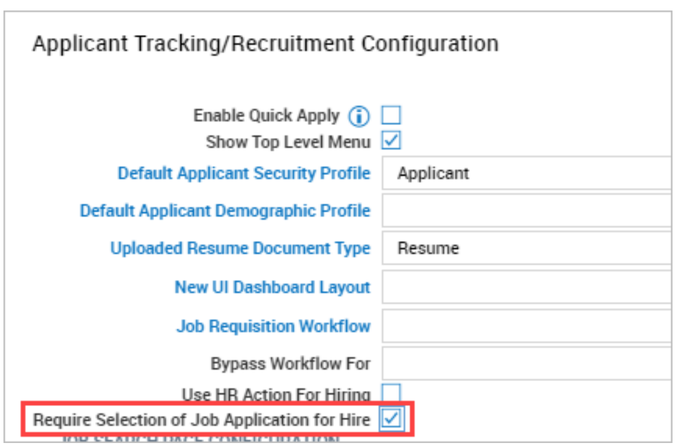
- In the widget, from the action ellipses of each hiring stage, you can do the following for each hiring stage listed:
  - *Disable* (or *Enable*)
  - *Mark As Required* (or *Mark as Optional*)
  - *Move Up/Down*
  - Enter a sequence number in the *Move To* field to quickly move to a new position in the list.
- For backwards compatibility, all hiring stages for existing job requisitions will be in enabled mode, not marked as required, and in existing sequence order as the global hiring stages with enforce sort order disabled.

New Setting to Require Selection of Job Application When Hiring

147748 & 155180: You can opt to hire only applicants who have gone through all required hiring stages for the applicant's job application. This option is available when using the Hire button from the applicant screen or when using an HR Action to hire.

Recruitment Configuration

A new ***Require Selection of Job Application for Hire*** setting has been added to the *Applicant Tracking/Recruitment Configuration* widget in the *Configuration* page of the Recruitment module.



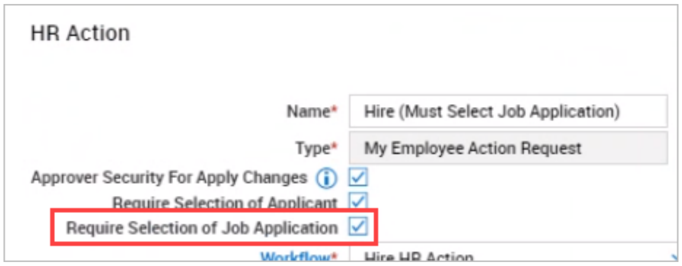
When checked, the following can be expected.

Using Hire Button from Applicant Page

- Users will be required to select a job application during the hiring process.
- In the job applications selection list, only job applications where all required hiring stages have been completed will display.

HR Actions

For HR Actions, the option is located in HR Action configuration under *Company Settings > HR Setup > HR Actions* and only those applications will appear which have all required hiring stages completed.



Using an HR Action to Hire

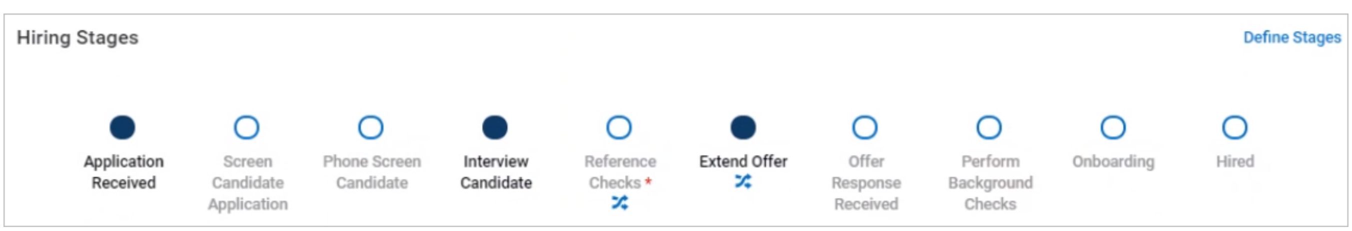
- Users will receive a pop-up requiring them to select a job application during the hiring process.
- If user hires from the employee page and an HR Action is required for hiring, the system will still prompt for the required job application.
- In the job applications selection list, only job applications where all required hiring stages have been completed will display.

NOTE: Completion of a step is the act of marking it via the darkened circle. If a workflow is attached to the hiring stage that triggers upon marking complete, the hiring stage is defined as complete when marking complete, not the workflow being completed as well.

Hiring Stage Timeline Completion Status

160368: Previously, if users skipped ahead in Hiring Stages, the system would darken the previous hiring stages as well, even though in the *Hiring Stages Change History* widget only the completed stages would show. There was a disconnect between what had been completed and what the *Hiring Stages* widget showed.

Now: When modifying the hiring stages and *Enforce Sequence* is not enabled, users can skip and complete steps without the system showing preceding stages as completed. In the *Hiring Stages Change History* widget, only the completed stages will show. (Completion of a step is the act of marking it via the darkened circle. If a workflow is attached to the hiring stage that triggers upon marking complete, the hiring stage is defined as complete when marking complete, not the workflow being completed as well.)



If *Enforce Sequence* is enabled, the hiring stages will be grayed out and unavailable and users must complete each of the stages in sequential order.

Mass Updating of Hiring Stages

149021: When users attempt to mass update job application hiring stages, an error message will appear when the job applications selected for the hiring stage update are not for the same job requisition. The error reads: *All of the job applications selected for hiring stage update must be for the same job requisition.*

Identified areas:

- **Job Applications Report** (*Team > Recruitment > Candidates > Job Application*)
- **Recruitment Questionnaire Answers Report** (*Team > Recruitment > Candidates > Recruitment Questionnaire Answers Report*)
- **Applicants Job Applications** (*Team > Recruitment > Candidates > Applicants > View Applicant > Job Applications*)

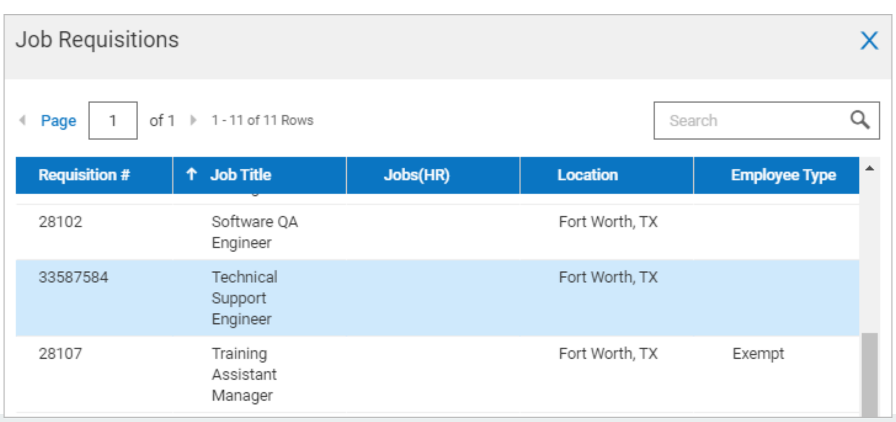
New UI: Recruitment – Job Requisition Templates

Creating Job Requisition Templates Using Existing Requisition

145250: Creating new job requisition templates will now be easier. Users will now be able to select an existing job requisition and use it to create a new template.

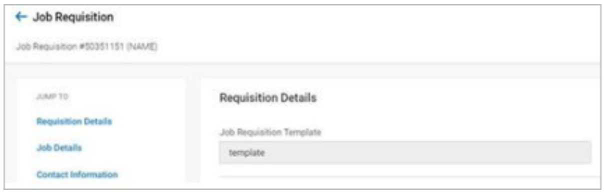
In the ***Job Requisition*** field in the ***Template Details*** widget, users can use the lookup to select an existing requisition. And *Info* icon explains that data can be copied from existing job requisitions into the template.

A warning message displays to inform the user that all fields will be overridden with the selection. Once proceeding, the data in the fields shall be prepopulated from the selected job requisition and if the prepopulated Job(HR) is active then the job specific fields (Job Title, Employee Type, Job Description & Job Categories) are pre-populated from the job instead**.** Once saved, the template is ready for use when creating new job requisitions under *Team > Recruitment > Job Requisitions*.



Job Requisition Template Use Once Assigned to Job Application

153309: The *Job Requisition Template* field will be grayed out once a job requisition is used in job applications. This will prevent users from selecting new templates in the job requisitions and preserve the intended settings from the original template.

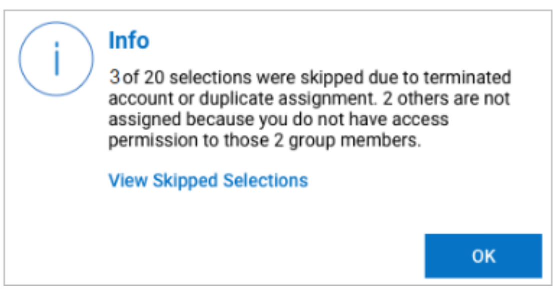


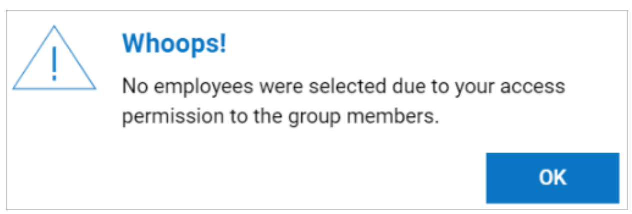
New UI: Recruitment Questionnaires

Message When Assigning Questionnaires to Group for Users with Limited Authority

153364: For users with limited access to the employees of a company group, a pop-up message will display to the user when assigning a recruitment questionnaire when selecting a group where the user does not have access to all of the employees in that group. The message will show the number of employees processed and why they were skipped. It will also show in the message if employees were skipped due to having a terminated status or the questionnaire was previously added to the selected employees. If the user has access to no employees, the message will inform the user no employees were updated due to their permissions.

A *View Skipped Selections* link will be available so users can view the affected employees they have permission to see.



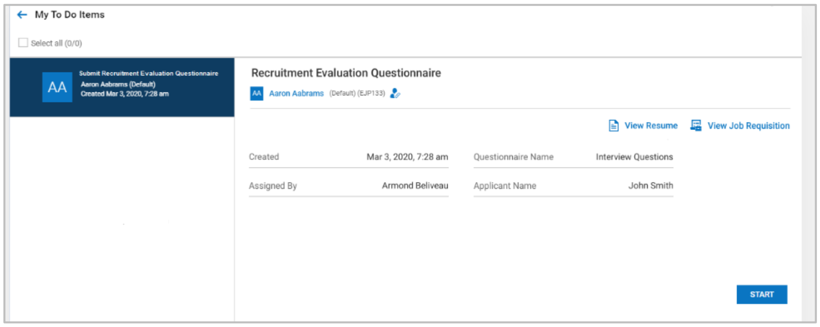


To Do Item Generated When Assigning Recruitment Evaluation Questionnaire

153585: 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.



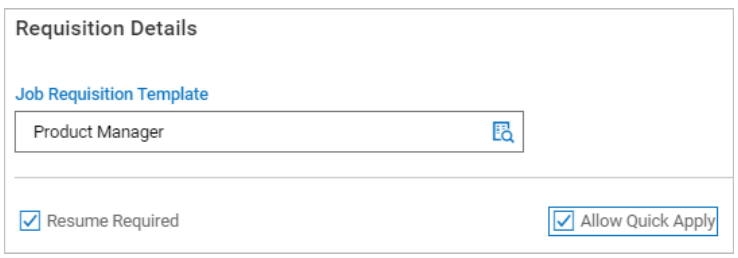
New UI: Recruitment Quick Apply

Questionnaires Allowed on Job Requisitions for Quick Apply

147618: You can now attach an applicant questionnaire to job requisitions set to allow Quick Apply. When Quick Apply has a questionnaire attached, the applicant will click the *Continue* button on the Quick Apply popup, which will then open the questionnaire to be completed. Applicants will complete the questionnaire and click the *Save & Apply* button.

Resume Required Checkbox Added for Quick Apply

145624: A ***Resume Required*** checkbox has been added to the *Requisition Details* widget in the Job Requisition configuration page. This checkbox can be used when also checking *Allow Quick Apply*.



- When the checkbox is checked, the applicant must upload a resume when applying for that job.
- When the checkbox is NOT checked, the applicant still has the option to upload resume, but it is not required. The applicant can move forward without uploading a resume.

Multiple Resumes Allowed for Quick Apply Applicants

146748, 154618, 154624, 153998, 154002, 158631, 154619

Applicants using Quick Apply can now upload more than one resume when applying for multiple jobs. They can now have one resume per job applied for. All resumes uploaded through the job applications will be visible in the *Applicant Documents* widget.

- The resume will be associated with the Applicant Profile and at the Job Application level.
- Hiring managers will be able to view the resume specific to the job application on the *Job Applications* report page (using the *View Text Resume* icon) and can also be viewed inside the job application in the *Resume* widget. They will also be able to edit and change the resume on this page on completed job applications. If the resume is switched out, the new resume will be the resume of record.
- Quick Apply applicants will be restricted from reapplying for the same job requisition. If attempted, a message will be displayed informing the applicant they have already applied to the given job requisition. If the original apply process is incomplete, the applicant can proceed with another attempt.

NOTE: If Data Retention is enabled in your company, candidates will be presented a consent pop-up for the handling of their personal data in our system. Returning candidates who have already given consent will not be shown the pop-up again. Returning candidates who have not previously given their consent will be presented with the pop-up.

Email Notification for Quick Apply Applicants

154000 & 149758: A new notification for Quick Apply applicants has been added to the system. When applicants apply for a job through Quick Apply an automatic email will be sent to the applicant to instruct them how to access the Applicant Portal and finish the set up their profile.

- Applicants will be prompted to reset their password via link in email. After resetting, they are taken to their applicant profile.
- If link has expired, an option to send a new link will be available. There is no limit to the number of times a new link can be requested.

New UI: Recruitment Traditional Applicants

Multiple Resumes Allowed for Traditional Applicants

157516, 146756, 157505: Applicants using the Applicant Portal can now upload multiple resumes with one resume allowed per each job application.

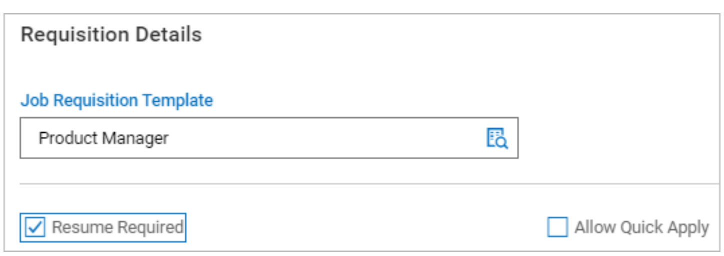
- When a resume is uploaded for a specific job application, that resume will be stored at the job application level.
- The most recent resume uploaded for that individual applicant will also update the resume on the applicant record.
- Recruiter/Hiring Manager will be able to view the resume specific to the job application on the Job Application report with the View Resume icon & also inside the Job Application.

Example: User applies to Job Req A and uploads Resume A. Resume A will be viewable on Job Application A and the applicant record.

Same user then applies to Job Req B and uploads Resume B. Resume B will be viewable on Job Application B and the applicant record. Resume A is still the only resume viewable on Job Application A.

Resume Required Checkbox Added for Traditional Applicants

161237: A ***Resume Required*** checkbox has been added to the *Requisition Details* widget in the Job Requisition configuration page.



- When the checkbox is checked, the applicant must upload a resume when applying for that job.
- When the checkbox is NOT checked, the applicant still has the option to upload resume, but it is not required. The applicant can move forward without uploading a resume.

New UI: Recruitment Workflows

Recruitment: Applicant Custom Form Workflow Routing to Correct Manager

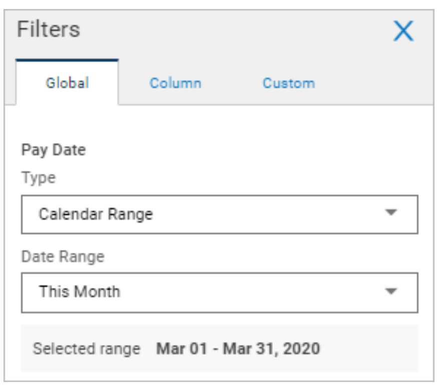
146144 & 163716: When an Applicant Custom Form workflow has been assigned to an applicant, and there are multiple job applications assigned to the applicant, the workflow will now route to the correct manager. Previously in this scenario, the backup manager received the To Do items instead of the correct hiring manager.

New UI: Reports

Pay Statement History (Imported): Calendar Range Added to Pay Date Options

137652: In the *Pay Statement History (Imported)* report, **Calendar Range** has been added to the list of options under the *Pay Date* filter. When selected, a calendar range can be defined for the report.

The report is located under *Team > Payroll > Reports > Pay History* and the company must have *Import External Pay History* enabled in the *Available Functionality* widget of their company. The purpose for this functionality is to export external pay statements from another system into our system for reporting purposes only.



Open Enrollment Report: Employee Filter Logic Update

152441: In the Admin Open Enrollment report (*Reports > HR Reports > Open Enrollment*), the logic for the "# Employees" columns have been updated to better reflect the number of employees who may participate in Open Enrollment. Employees with Terminated status are filtered out to make the employee counts more meaningful.

Time and Labor

Added Date Field to Employee/Manager Signature on Printed Timesheets (Classic UI & New UI)

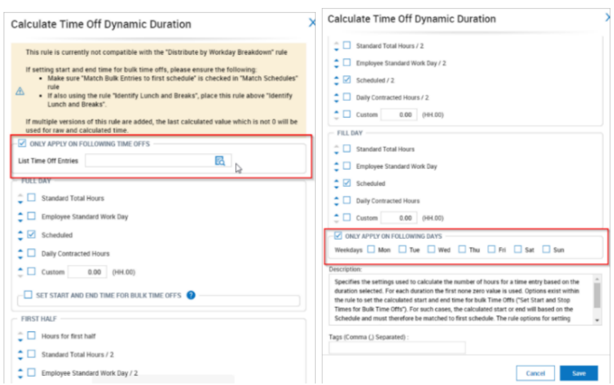
148166: For companies that require employees to sign and date their timesheets, *Manager Signature Line* and *Employee Signature Line* options have been added to the timesheet *Print Settings*. To access *Print Settings*, navigate to *Team* > *Time* > *Timesheets* > *Manage Timesheets* > *All Timesheets*, select the employee's timesheet, then select the three-dot ellipse and click *Print*. When one or both options are enabled, the signature line and date line will display on the printed timesheet.

NOTE: Timesheets can also be printed directly from the timesheet in the Classic UI.

Added Time Off Type Selector & Day Selector to Calculate Dynamic Duration Rule (Classic UI & New UI)

139489: To accommodate companies that calculate time off hours and types differently, two new sections have been added to the *Calculate Time Off Dynamic Duration* rule:

- **Only Apply On Following Time Offs –** A *List Time Off Entries* selector is available in this section to allow you to choose a specific type of time off.
- **Only Apply On Following Days –** Select which days of the week the chosen time off type will apply to.



NOTE: There is now support for multiple dynamic duration rules to be active in one pay calc profile.

Added Working Time Regulations to Company Setup > Defaults Tab (Classic UI & New UI)

87034: A new field, *Working Time Regulations*, has been added to the *Profiles* section under the *Defaults* tab of *Company Setup*. Previously, users had to manually add this field for new employees.

Attestation – Workflow – Punch Summary / Punch Date Tags (Classic UI & New UI)

154384: You can now add *Punch_Summary* and *Punch_Date* tags to an attestation notification from the *Generate Notification* step of the *Attestation Questionnaire* workflow so that the user receiving the notification can easily access the punch summary for that date. Previously, attestation notifications did not include punch summary and date information.

Disable Biometrics on InTouch from Terminal Settings (Classic UI & New UI)

160997: To assist in preventing the spread of illnesses, users can now disable biometrics remotely from the Terminal Configuration for all versions of InTouch clocks.

What has been added: A new checkbox, *Biometrics*, has been added to the Terminal Configuration for InTouch clocks. If *Biometrics* **is not enabled**, the biometric reader on the clock will be disabled. Additionally, all biometric-related features will be disabled as well. Enroll/Unenroll soft keys will not be displayed on the InTouch clock and all Verify Finger options will be removed from all SmartView soft keys.

Employee Information – Points – Removed "Edit" Capabilities from ESS "View Detailed Points History" (Classic UI & New UI)

151725: Employees will not have editing capabilities from the *Detailed Points History* report unless *View Detailed Points History* and *Edit Balances* is enabled in the security profile. The edit pencil icon will display and can be selected on the *Detailed Points History* report whether the user has editing permissions or not. If the user does not have editing permissions, they will not be able to edit point details. If the view permission is set in their security profile, users can view any manually edited points.

Reports – "Exception Entries" Audit Trail Report (Classic UI & New UI)

126299: A new Audit Trail report, *Exception Entries* is now available to display information about employees who have had time exceptions (such as fixing missed punches or edits to *From* and *To* times) made to their records or had those exceptions cleared. This report is available in the following locations in the New UI:

- MSS: *Time > Reports > Audit Trail > Exception Entries*
- ESS: *My Reports > Time Reports > Audit Trail > Exception Entries*

In the Classic UI, it is available at *My Reports > System > Audit Trail > TA > Exception Entries*.

Report Dialogs

Report Dialogs – Initiate Notification on Timesheet Submit (Classic UI & New UI)

159369: A new notification for Report Dialogs has been added, *Time Entries Require Manager Approval On Submit*. Previously, other Report Dialogs notifications had to be scheduled to run via the *When* widget, which triggered a one-time notification. Because of this, users would not receive a notification for each new timesheet submission, and instead had to find the email containing the original report dialogs link to approve the time entry.

What is different from other Report Dialogs Notifications:

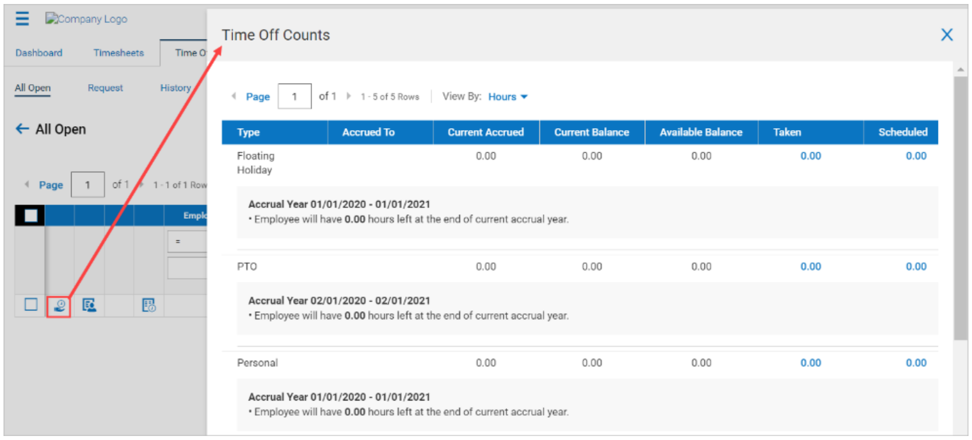
- Cost Center Managers are currently the only recipients who can receive this notification. In a future release, all recipients in the existing Report Dialogs notifications will be included.
- The *When* widget has been removed for this notification because the notification will be sent to the Cost Center Manager each time a timesheet is submitted.

Timesheet Utilities – Renamed "Timesheet Changes" to "Timesheet Audit Trail" (Classic UI & New UI)

160169: Under the timesheet *Utilities*, the option *Timesheet Changes* has been renamed to *Timesheet Audit Trail*.

Time Off – All Open – View Time Off Counts Button [MSS] (Classic UI & New UI)

151938: *Button: View Time Off Counts* column is now available to add to the *All Open* page under *Team > Time > Time Off > All Open*. When the *View Time Off Counts* button is added, managers will be able to view an employee's accrual balances from the *Time Off Counts* pop-up window.



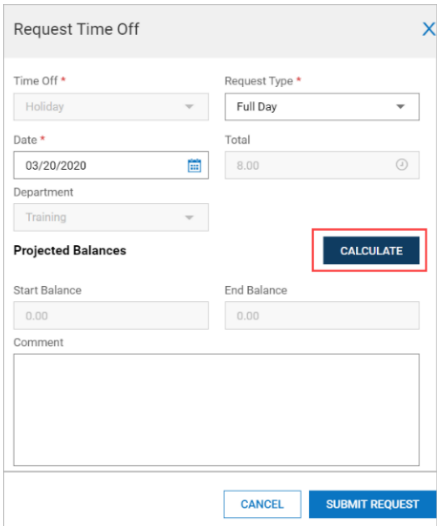
TOR – Calculate Projected Balances During Request

Time Off Requests – Modify Request & Submit Request (Classic UI & New UI)

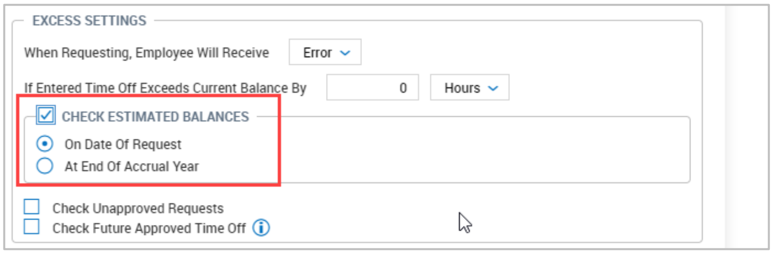
151767 & 139358: Currently, employees can only view their projected accrual balance for the entire accrual year when requesting time off and inside their employee profile accruals widget. The system can validate against projected balances and trigger errors/warnings if the employee won't have enough hours to cover the request, but employees cannot see this calculated value before submitting the request or in instances where an error/warning wouldn't be triggered. Employees will now have a way to see their projected start and end balances when submitting or modifying a time off request.

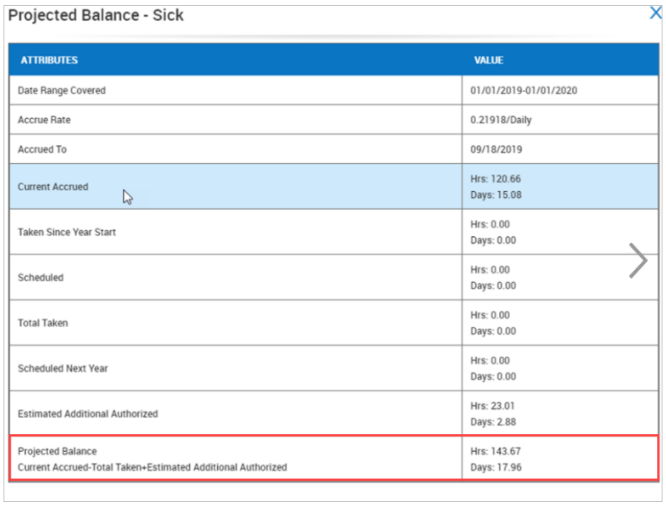
What has been added: A *Calculate* button for *Projected Balances* has been added to the following:

- *Modify Time Off Request* screen
- *Request Time Off* pop-up window



When the *Calculate* button is selected, the projected starting and ending balances will be displayed. Projected balances will be calculated based off the *Excess Settings* configuration in the employee's time off request profile. If *Excess Settings* is disabled or the employee does not have a time off request profile assigned, it will project based on the *end of the accrual year* by default.




Projected Balance - Sick

ATTRIBUTES	VALUE
Date Range Covered	01/01/2019-01/01/2020
Accrue Rate	0.21918/Daily
Accrued To	09/18/2019
Current Accrued	Hrs: 120.66 Days: 15.08
Taken Since Year Start	Hrs: 0.00 Days: 0.00
Scheduled	Hrs: 0.00 Days: 0.00
Total Taken	Hrs: 0.00 Days: 0.00
Scheduled Next Year	Hrs: 0.00 Days: 0.00
Estimated Additional Authorized	Hrs: 23.01 Days: 2.88
Projected Balance Current Accrued-Total Taken+Estimated Additional Authorized	Hrs: 143.67 Days: 17.96

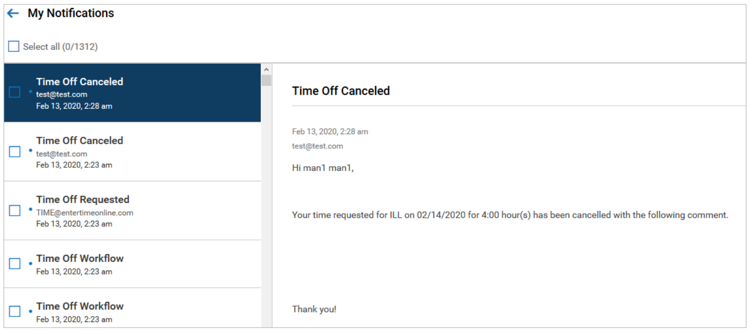
Time Off Requests – Available Accrual Balance on Date of Request Access Permissions (Classic UI & New UI)

158774: *Calculate* and *Projected Balances* will be hidden in the following scenarios:

- When a user selects a time off category that is attached to an accrual policy with the *Display Projected* setting (in the Accrual rules) disabled.
- When a user selects a time off category that is not attached to an accrual policy at all.
  - The scenarios above apply to both submit request (ESS) and modify request (MSS) pop-ups.
- The employee doesn't have the ability to view their own accrual balances in their security profile.
  - This applies to submit request (ESS) pop-ups only.
- The manager doesn't have the ability to view their employee's accrual balances in their security profile.
  - This applies to both submit request on behalf of employee (MSS) and modify request (MSS) pop-ups.
- When the employee **does not** have an Accruals profile assigned to them.
  - This applies to both submit request (ESS) and modify request (MSS) pop-ups.

Time Off Request Notifications for Cancelled Requests (Classic UI & New UI)

136504: Users will now receive a *Time Off Canceled* notification when an approved time off request is deleted.



New UI Updates – Table of Functionality Added to Pages

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	Desk-top	Mobile
110324 (EPIC)	TLM	Points	*MSS: Time > Points > Balances*	Edit and view points changes icon available.	No	Yes
110324 (EPIC)	TLM	Points	*MSS: Time > Points > Balances*	Change Updated To Date button available.	Yes	Yes
110324 (Epic)	TLM	Points	*MSS: Time > Points > Balances*	Run Points Rules button available.	Yes	Yes
110324 (Epic)	TLM	Points	*Time > Reports > Points > Points History Report*	User can add points to the Employee Points reports.	Yes	Yes
110324 (Epic)	TLM	Points	*MSS: Time > Points > Balances*	Edit Points balances and view changes.	Yes	Yes

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
111801 (Epic)	TLM	Reports	*Time > Timesheets > Change Requests > All Timesheet Change Requests*	Added Button: Open Timesheet column to Timesheet Change Request report.	Yes	Yes
141897 (Epic)	TLM	Workflow	*Time > Overtime > Request*	Overtime Request screen available.	Yes	Yes
111801 (Epic)	TLM	Reports	*Time > Timesheets > Change Requests > All Timesheet Change Requests*	Added Button: Open Timesheet to the Pending Timesheet Change Request report.	Yes	Yes
141897 (Epic)	TLM	Reports	*My Time > Overtime > Overtime Requests - Awaiting Acceptance*	Awaiting Acceptance report for overtime requests available.	Yes	Yes
110324 (Epic)	TLM	Points	*MSS: My Team > Employee Information* *ESS: My Information > My Profile > My Profile*	Manage Points link will display in Points widget under the Employee Profile.	Yes	Yes
110324 (Epic)	TLM	Points	*My Reports > Time Reports > Points*	Edit, view, and run points rules on Employees' Points History Report.	Yes	Yes
150861	TLM	Points	*Time > Timesheets > Approve Extra Pay Entries*	Approve extra pay entries from the *Approve Extra Pay Entries* report.	Yes	Yes

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
154543 147922 154542 156119	TLM	Accruals	*Accruals > Run Accruals*	Execute Accruals Rules under Run Accruals is available.	Yes	Yes
148383 (Epic)	TLM	Leave of Absence	*MSS: Leave > Balances*	Run entitlement and balance rules from the Entitlement and Balances report.	Yes	Yes
148383 (Epic)	TLM	Leave of Absence	*My Time > Leave > History*	Employees can view the details of their leave requests, and managers can view these details.	Yes	Yes
148383 (Epic)	TLM	Leave of Absence	*MSS/ESS: Leave > Cases*	Ability to add a note to the Leave of Absence Request.	Yes	Yes
148383 (Epic)	TLM	Leave of Absence	*MSS: Leave > History*	Managers and admins can view the details of a leave request.	Yes	Yes
148383 (Epic)	TLM	Leave of Absence	*ESS: Leave > Request*	All actions in the employee's Leave of Absence Request page are available.	Yes	Yes
148383 (Epic)	TLM	Leave of Absence	*ESS: Leave > Request*	Employees can view recent requests from the Leave of Absence Request page.	Yes	Yes

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
148383 (Epic)	TLM	Leave of Absence	*ESS: My Time > Leave > Request*	Intermittent (Weekdays) is available as a leave of absence request type along with Use Separate Settings checkbox.	Yes	Yes
156121	TLM	Accruals	*Accruals > Details*	The Accruals History report is available from Details via the Menu.	Yes	Yes
151982	TLM	Timesheets	*MSS: Time > Timesheets > Early/Late Punch Override*	Users can give employees additional time to register a punch.	Yes	Yes
158134	TLM	Timesheets	*MSS: Time > Timesheets > Early/Late Punch Override*	Users can give employees additional time to register a punch from the Employee Information page.	Yes	Yes
141897 (Epic)	TLM	Overtime	*Time > Overtime > Request*	The Change History report on the Overtime Request screen is a non-editable table.	Yes	Yes
141897 (Epic)	TLM	Overtime	*Time > Overtime > Request*	The Recent Requests report on the Overtime Request screen is a non-editable table.	Yes	Yes

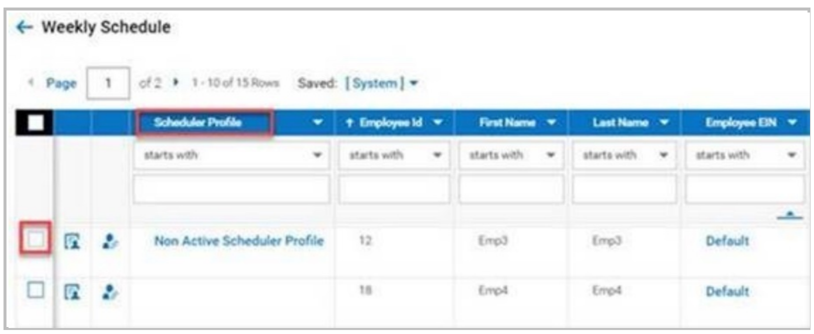
Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
160573 (Epic)	TLM	Overtime	*Time > Overtime > Request*	The Overtime Request screen is available.	Yes	Yes
160573 (Epic)	TLM	Overtime	*Time > Overtime > Request*	Managers can create and Overtime Request on behalf of the employee.	Yes	Yes

New UI: Added Approval State as Default Column – MSS Timesheets Report (Desktop & Mobile)

160083: In order to allow managers to be able to easily view the approval state of the timesheet, a new default column, *Approval State*, has been added to the *Timesheets* report.

New UI: Disabled Checkbox in Weekly Report (Desktop & Mobile)

133808: In the *Weekly Schedule* report (*Team > Schedule > Team Schedule View > Weekly/Daily Schedule > Weekly Schedule*), if an employee has an assigned Scheduler Profile, the selection checkbox for the row with the employee's information is disabled (not hidden).



New UI: Timesheets Approval History – Created New Mobile App Report [MSS] (Desktop & Mobile)

151968, 151981: As previously seen in the New Desktop Experience, the *Timesheets Approval History* report is now available in the New Mobile App under *Time > Timesheets > Timesheets Approval History*. To view the Approval History from the *Timesheets Approval History* report, select the *Timesheet Approval* icon.

New UI: Time Entry Approval State in Report/To-Dos

Added Time Entry Approval Record Column to To Do Item Report (Desktop & Mobile)

138844: In *My To Do* Items, the *Approve Time Entries* report has been updated to include an *Approval State* column so that users can easily see each time entry's approval status.

New UI: Time Off – All Open – Review/Modify Time Off Button [MSS] (Desktop & Mobile)

151949: In the time off *All Open* report, a new column has been added with a *Review/Modify Time Off* icon. This column will display by default. When the icon is selected, a *Modify Time Off Request* pop-up window will display.

New UI: Time Off – All Open & Pending Approval – Date Requested (View Scheduled People) Hyperlink [MSS] (Desktop & Mobile)

151954: Date hyperlinks will display in the *Date Requested* column on the *All Open* and *Pending Approval* pages. The *View Scheduled People* pop-up window will display upon clicking the date hyperlink.

New UI: Time Off – All Open – Reject and Approve Buttons [MSS] (Desktop & Mobile)

151951, 151950, 151960: The *Reject* and *Approve* buttons are available when multiselecting pending time offs from the *All Open* report.

New UI: Time Off – Pending Approval Report Added to All Open Report (Desktop & Mobile)

151929: The *Pending Approval* report is now available as a view in the *All Open* report, under *Team* > *Time* > *Time Off* > *All Open*.

New UI: Time Off – Pending Approval – Reject Page Level Button [MSS] (Desktop & Mobile)

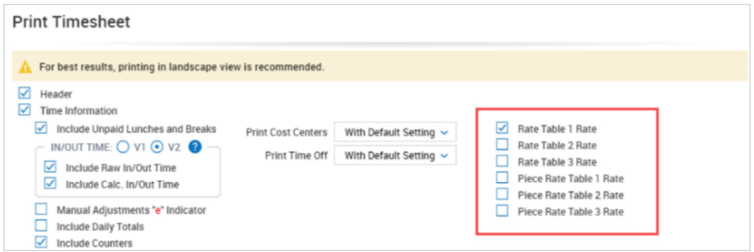
151959: The *Reject* button is available next to the *Approve* button when multiselecting pending time offs from the *Pending Approval* report.

New UI: Time Off – Pending Approval – Review/Modify Time Off Button (Desktop & Mobile)

151961: In the time off *Pending Approval* report, a new column has been added with a *Review/Modify Time Off* icon. This column will display by default. When the icon is selected, a *Modify Time Off Request* pop-up window will display.

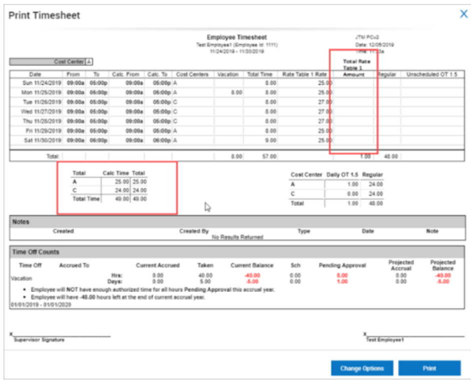
New UI: Timesheet – Print Utility – Added Total Rate Table Amount Columns (Desktop & Mobile)

140319, 152350: Previously, when printing timesheets, the print preview displayed the rate tied to the hours, but the total rate table amount that was calculated would not display. *Total Rate Table Amount* fields are now available to be enabled under *Print Timesheet*.



If the *Rate Table X Rate* fields are enabled, a new setting, *Rates*, will display in the *Time Summary Totals* section of the print preview. This will allow for the rate and calculated amount to display.

When these settings are enabled, the *Total Rate Table X Amount* column in the print preview will display next to the *Rate Table X Rate* if that column is also enabled. In addition, the Cost Center will display.

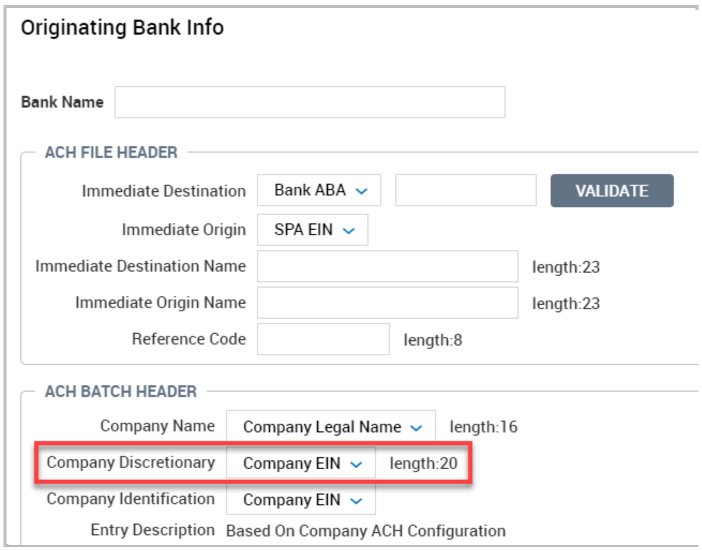


Payroll

Bank Accounts (Classic UI & New UI)

Originating Banks: Company EIN in Company Discretionary Data Field (Classic UI & New UI)

151072: Users can now choose the Company (Employer) EIN for the **Company Discretionary** data field in the ACH Batch Header section of the Originating Banks (*Maintenance* > *Configuration* > *Originating Banks* in Admin companies and *Company Settings* > *Payroll Setup* > *Originating Banks* in Client companies).



When Company EIN is selected for the Company Discretionary data field, the correct information displays in the correct format within the ACH file. The Company EIN (Tax ID) is pulled from the Tax ID field under *Company Settings* > *Global Setup* > *Company EINs*.

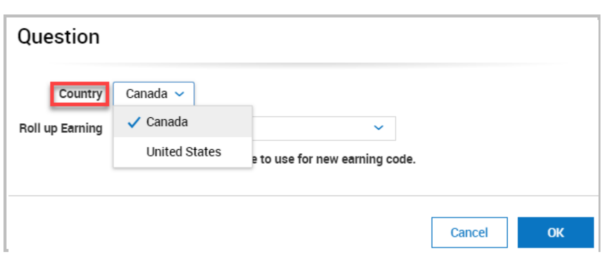
The Company EIN is listed in positions 21-40 in the Record Type Code 5 record and displays as left justified with no dash.

Earning Codes (Classic UI & New UI)

Country Code for Earning Codes (Classic UI & New UI)

151066: When a user adds an Earning Code from within a company under *Company Settings* > *Payroll Setup* > *Earnings Codes*, only the Earning Types (*Roll up Earning*) that are applicable for the countries the company is set up for are available.

When a company or the Admin Company is configured for both the US and Canada, a **Country** can be selected for the Earning Code so that only the Earning Codes for that country can be selected.



NOTE: An Earning Type can be associated with either Canada or the US, but not both.

Forms (Classic UI & New UI)

2020 State W-4 Withholding Forms (Classic UI & New UI)

The following states have released their state specific withholding forms for 2020, and the forms are now available within the system.

Ticket number	State	Form
147667	Iowa	W-4
147759	Arizona	W-4
147764	Connecticut	W-4
147789	Michigan	MI W-4
147791	Minnesota	W-4 MN
148174	Missouri	MO W-4
148498	New Jersey	W-4
148725	New York	IT-2104
148728	Rhode Island	W-4
148780	New York	IT-2104-E
149735	Illinois	W-4
152038	Delaware	W-4
152065	Maryland	MW507
153192	Arkansas	AR4EC
155850	Massachusetts	M-4
155853	New York	IT-2104
155858	Missouri	MO W-4
155861	New Jersey	W-4
155864	Indiana	WH-4
155869	Wisconsin	W-4
148824	Vermont	W-4VT
153388	California	DE4
94029, 165140	Puerto Rico	Tax Withholding Form 499-R-4, Add 2020 Form 499-R-4 from drop-down menu

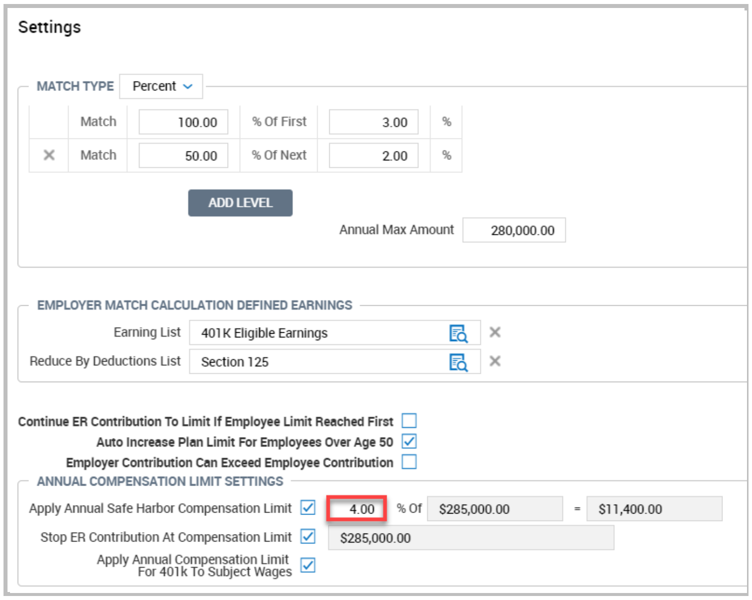
Retirement Plans (Classic UI & New UI)

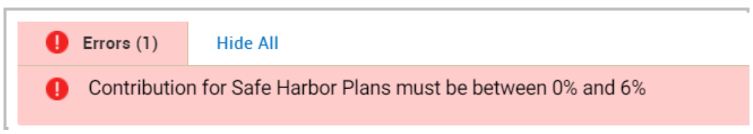
Safe Harbor Annual Compensation Limit Calculation Percentage (Classic UI & New UI)

105960: When users add or edit an existing Retirement Plan profile, they can now input/edit the percentage for the Safe Harbor Annual Compensation Limit, which follows the Enhanced employer contribution. The employer amount will be reduced according to the appointed percentage for the Safe Harbor Annual Compensation Limit. Users can not add a percent that exceeds the maximum allowable contribution percent, currently 6%.

There are 3 different ways that employer contributions can be allocated for Safe Harbor plans. The 3 contribution methods are:

- **Basic** – The employer matches 100% of the first 3% of compensation, plus 50% of the next 2%.
- **Enhanced** – A formula must be at least as generous as the basic match and cannot be more than 6% of compensation. A common enhanced match is 100% of the first 4% of compensation.
- **Non-Elective** – The employer contributes 3% of compensation to all eligible employees.





Reports (Classic UI & New UI)

State Reciprocity Override as a Column in Reports (Classic UI & New UI)

146403: From *Available Columns*, Admins can now add a *State Reciprocity Override* and an *Unemployment State* column to the following reports:

- All System Accounts (*Maintenance > All System Accounts*)
- All Tax Accounts (*Maintenance > Client Resources > Payroll (Taxes) > Account Taxes*)

Also, from *Available Columns*, Clients can now add a *State Reciprocity Override* to the following reports:

- Employee Information (*Team > My Team > Employee Information*)
- Account Taxes (*Team > Payroll > Employee Payroll Maintenance > Taxes > Taxes*)

Tax Information (Classic UI & New UI)

Tool Tip for State Reciprocity Override Settings (Classic UI & New UI)

155684: The system now includes a tooltip next to the *State Reciprocity Override* field (*Employee Information > Payroll Tab > Tax Information > State*) to help users understand the various selections available for the field.

Employee Setup: My Paycheck Simulator did not Reflect 2020 Federal W-4 Fields

152666: Employees can now see the 2020 Federal W-4 fields on the *My Paycheck Simulator* page when they click the *Paycheck Simulator* button. Previously, employees could not see their 2020 W-4 information on this page.

Garnishments: Garnishment Deduction Required Save to Calculate

134166: In the *Deduction Wizard*, when users configure a garnishment deduction to calculate as a percentage of disposable earnings and then create a pay statement, the garnishment now displays on the pay statement. Previously, if users did not save the deduction before creating the pay statement, the pay statement would not display the garnishment.

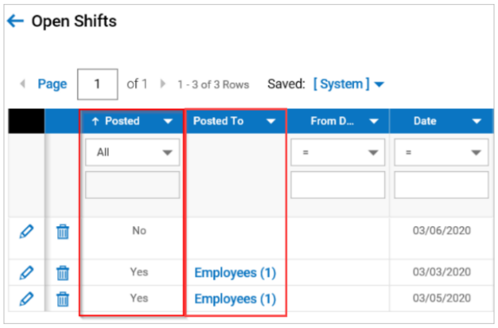
General: Retirement Plan Eligibility Date for Hire Dates on the 1st

89722: If an employee starts on the first day of a month, the system now correctly calculates the employee's eligibility date for retirement plans. Previously, when employees started on the first day of some months, the system incorrectly calculated their eligibility date.

Scheduler

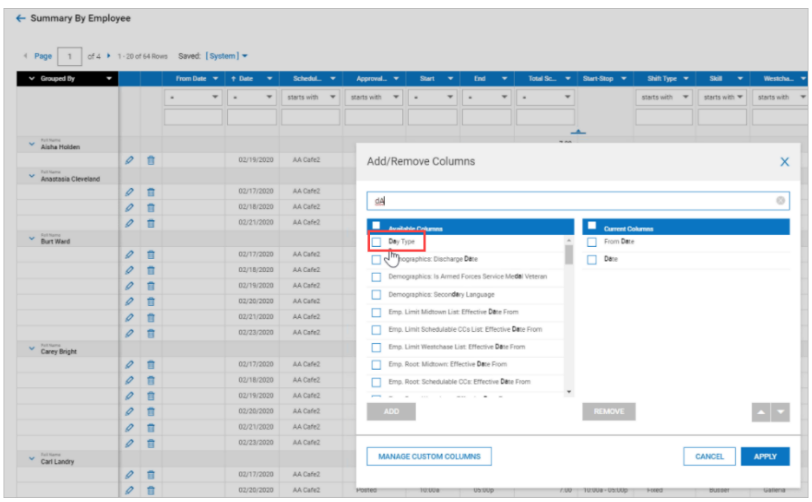
Added Column to Open Shifts to Display Posted Status and List of Employees Open Shift Has Been Posted to (Classic UI & New UI)

155124, 155125: Two new columns, *Posted* and *Posted To*, have been added to the *Open Shifts* report (*Schedule* > *Staffing* > *Open Shifts*). The *Posted* column will indicate if the shift has been posted or not and the *Posted To* column will display which employees the shift was posted to.



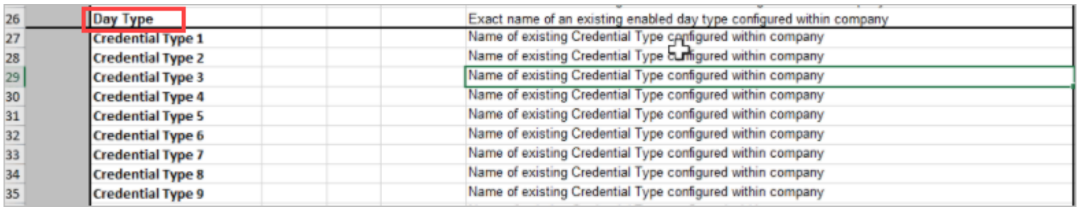
Added Day Type Column to Summary by Employee and Open Shifts Reports (Classic UI & New UI)

152457: If *Day Type* is enabled from *Company Settings* in the *TLM Policies* widget (*Company Settings* > *Global Setup* > *Company Setup* > *Company Config*), you will be able to add the *Day Type* column to the *Summary By Employee* and *Open Shifts* reports. This will allow users to report on day type if they are assigned to shifts.



Added Day Type to Schedule Shifts Import and Schedule Template Imports (Classic UI & New UI)

152456: A *Day Type* column is now available via the *Schedule Shifts* and *Schedule Template* imports so that a *Day Type* can be automatically assigned to a shift.

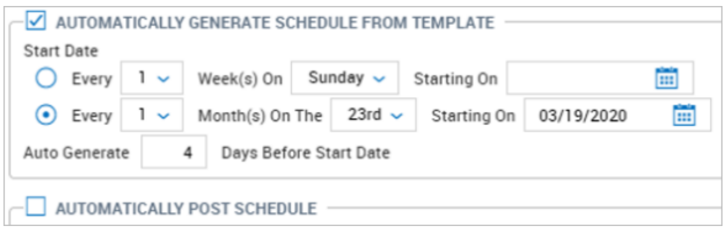


26	Day Type	Exact name of an existing enabled day type configured within company
27	Credential Type 1	Name of existing Credential Type configured within company
28	Credential Type 2	Name of existing Credential Type configured within company
29	Credential Type 3	Name of existing Credential Type configured within company
30	Credential Type 4	Name of existing Credential Type configured within company
31	Credential Type 5	Name of existing Credential Type configured within company
32	Credential Type 6	Name of existing Credential Type configured within company
33	Credential Type 7	Name of existing Credential Type configured within company
34	Credential Type 8	Name of existing Credential Type configured within company
35	Credential Type 9	Name of existing Credential Type configured within company

Added Start Date to Schedule Template Auto-Generate Parameters (Classic UI & New UI)

158780: Previously, you could not choose a start date for when a schedule would auto-generate. Going forward, you can now select a specific start date for when schedules should begin auto-generating.

What has been added: From the *Automatically Generate Schedule From Template* widget under the *Schedule Template* page, a new field is available, *Starting On*, which provides a calendar date selector. If you enter a number in the *Auto Generate _ Days Before Start Date* field, that will pertain to the days before the start date chosen when the schedule will begin auto-generating.



Availability/Preferences Select All Could Not Load More Than Certain Amount of Employees (Classic UI & New UI)

148819: Previously, the system would not load a certain number of employees from the *Availability/Preferences* screen.

What is new:

- The first 50 employees will be listed when you click the *Existing Availability/Preferences* button, with the option to load more employees.
- Availabilities/preferences will display for any selected number of employees when you click the *Existing Availability/Preferences* button.
- If one employee is selected, their availability/preferences will display on the calendar. If multiple employees are selected, data will not display on the calendar.
- From the *Existing Availability/Preferences* pop-up window, you will be able to delete by selecting *Delete All Availability* and *Delete All Preferences*.

Created ESS Rejection Notification (Classic UI & New UI)

150183: Previously, when multiple employees requested the same open shift, or when multiple employees were selected for shift swaps and coverage requests, the employees who were approved received a notification but the employees who were rejected did not receive a notification.

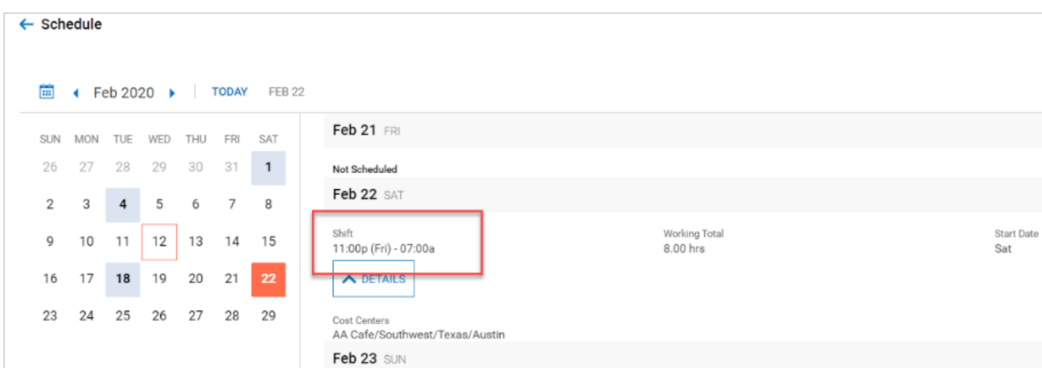
What has been added: In the default workflow within the G*enerate Notification* step, a new option, *Non Approved Peers* has been added to the *Send Notification To* drop-down so that a notification is sent to employees who have been rejected.

NOTE: Existing workflows will need to have this step added manually.

Previous Day Start

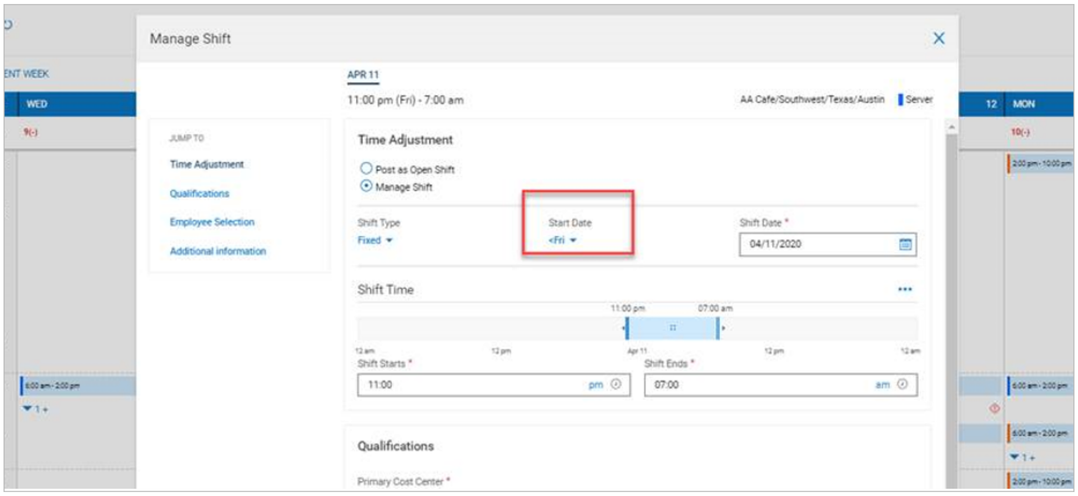
Added Previous Day Details to Shift Notification (Classic UI & New UI)

156175: Previous day details will now be included when applicable in global notifications for schedule changes/posting of schedules, posted open shifts, and schedule peer action so that employees are informed that the shift will start on the previous day of when the shift was assigned.



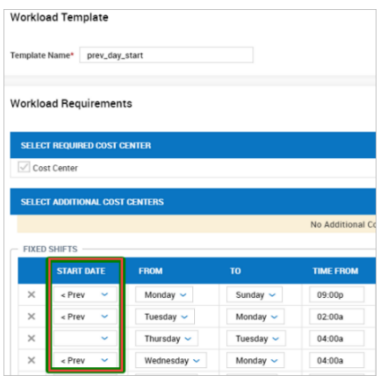
Added “Start Date” Option to Manage Shift Window (Classic UI & New UI)

147955: A *Start Date* field has been added to the *Manage Shift* window for reports and in all schedule views so that you can select a previous start date. For example, if the shift starts on 11 PM (Friday night) to 7 AM (Saturday morning), with this new feature, the shift will be applied to Saturday on the timesheet even though the shift begins on Friday.



Added "Start Date" Option to Workload Template and Import (Classic UI & New UI)

154242: A *Start Date* column is now available when creating new shifts, including via *Workload Template* and workload template import files, so that you can assign a previous day start to shifts. When a previous day is selected, this assignment will appear on the scheduled shifts.



Added Start Day to Schedule Shifts and Template Shifts Import Files (Classic UI & New UI)

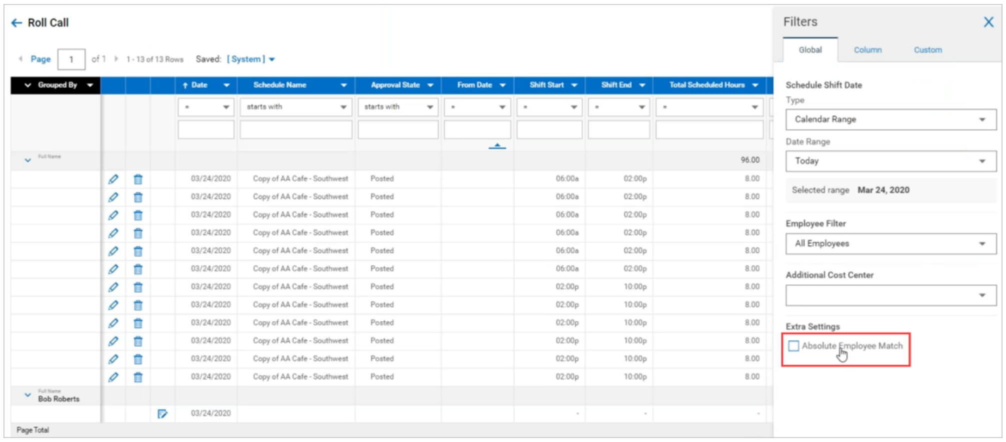
154526: In order to allow for a previous start date to be determined, a *Start Date* column has been added to the Schedule and Shifts template imports.

Roll Call Report Match Criteria on Scheduled Employee (Classic UI & New UI)

159380: A new match criteria option, *Absolute Employee Match*, is available for the *Roll Call* report from the *Global* tab under *Filters*. When enabled, the system will match a clocked in employee to their scheduled shift regardless of their shift cost center.

If an employee is scheduled for multiple shifts per day, the first clock in will match the first scheduled shift, the second clock in will match the second scheduled shift, etc.

If a scheduled employee does not clock in, the shift will display as open with no match.



Schedule Fairness Spread of Hours Rule (Classic UI & New UI)

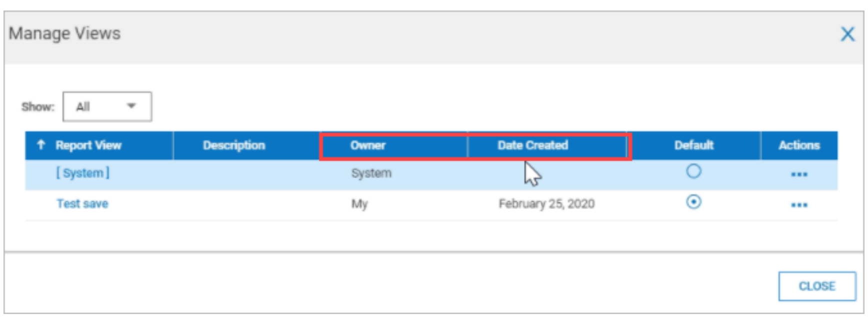
141649: A new rule, *Spread of Hours*, has been added to Schedule Fairness. This rule allows for extra pay when an employee's spread of hours between the start time of the first shift of the day and end time of the last shift of the day exceeds X number of hours. This interval of time includes scheduled time plus lunch/breaks. The spread of hours also applies to an employee working more than one shift in a day, and one of the shifts exceeds 10 hours.

To-Do Items were Not Removed from Employee To-Do List After Expiration (Classic UI & New UI)

153564: Previously, if To-Do items such as Shift Swap and Coverage requests were not manually rejected, the requests remained in the *My To Do Items* list despite the dates being expired. Going forward, To-Do items will be automatically removed from the list when the associated date has expired.

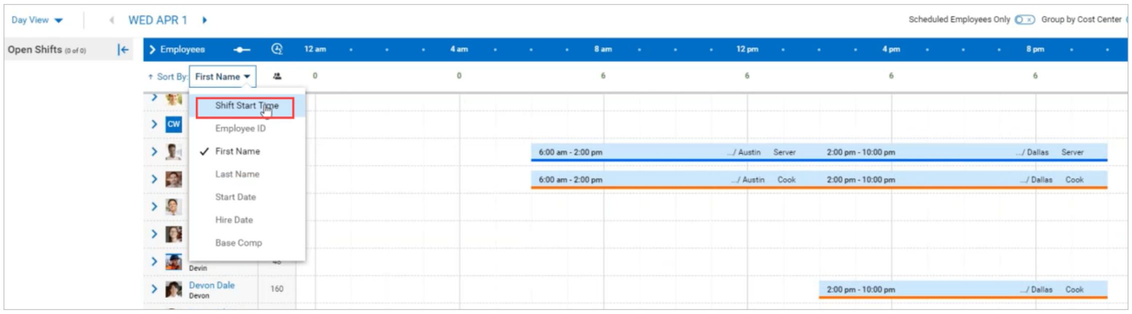
New UI: Added Owner and Date Created Field to Schedule Manage Views Pop-Up (Desktop & Mobile)

152386: *Owner* and *Date Created* columns have been added to the *Manage Views* pop-up window on the schedule so that you can see who created the view settings and the date that they were created.



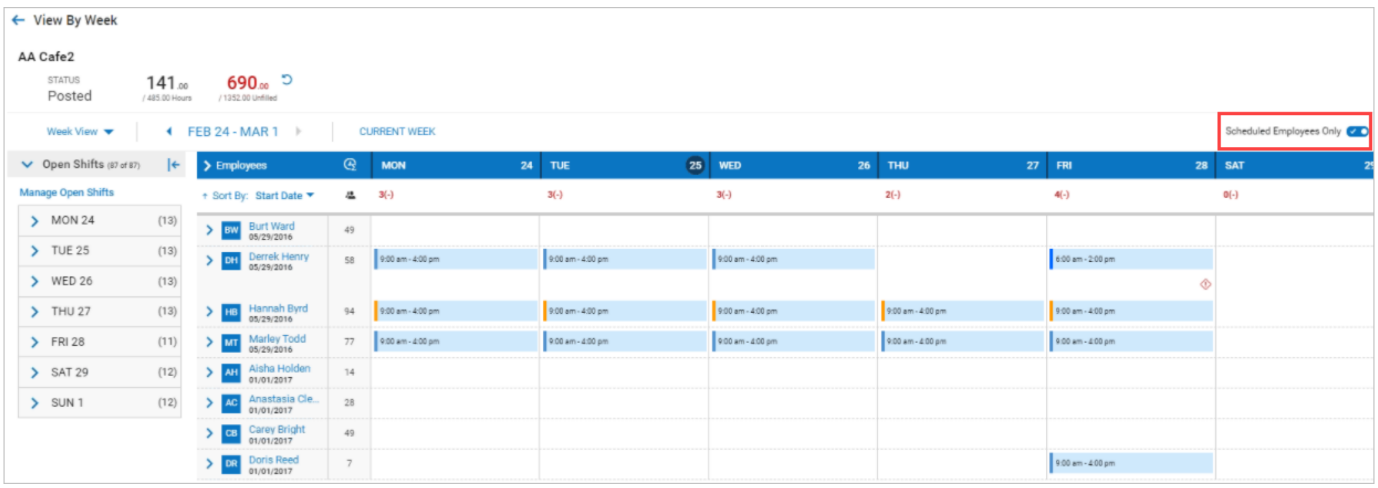
New UI: Added Start Time in Sort Option in Day View (Desktop & Mobile)

152398: A new sort option in the Day View has been added, *Shift Start Time*. When selected, the schedule will be chronologically ordered by the earliest shifts to the latest, along with the option to sort ascending or descending.



New UI: Added Toggle to Show Scheduled Employees Only to Schedule and Schedule Templates (Desktop & Mobile)

152402: A new toggle, *Scheduled Employees Only*, has been added to the schedule views and schedule templates so that only employees who have scheduled shifts assigned will display. If you print or save the view of the schedule with the toggle enabled, the settings will remain.

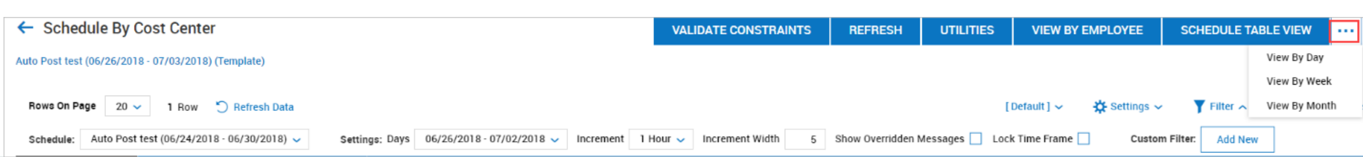


New UI: Added View By Week/View By Month to the Drop-Down List on Schedule by Employee Report (Desktop)

157682: In a previous release, *View By Day* was added to the drop-down from the three-dot ellipsis button for the following reports/screens:

- *Schedule By Employee* report
- Individual schedule settings
- *View By Employee* screen
- *View By Cost Center* screen
- Schedule Table View

What has been added: *View By Week* and *View By Month* have been added to these reports/screens.



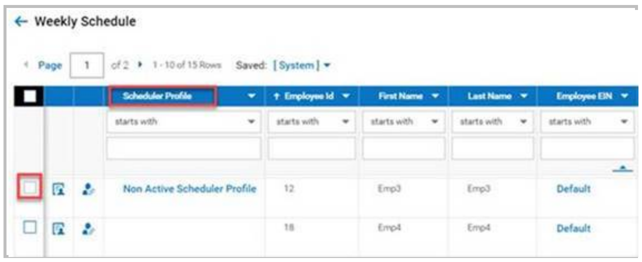
New UI: Allow User to Determine Paste Location of Copied Shifts – Day/Week/Month Views (Desktop & Mobile)

155127,155126: Previously, when a single shift or multiple shifts were selected and copied in any of the views, they could be pasted only to the same employee and day that they were copied from.

What's new: When you copy a single shift or multiple shifts, you can now select any employee row, as well as the *Open Shifts* panel in the day, week or month view to paste the shift(s) to.

New UI: Disabled Checkbox in Weekly Report (Desktop & Mobile)

133808: In the *Weekly Schedule* report (*Team* > *Schedule* > *Team Schedule View* > *Weekly/Daily Schedule* > *Weekly Schedule*), if an employee has an assigned Scheduler Profile, the selection checkbox for the row with the employee's information is disabled (not hidden).



New UI: Display Employee's Nickname in To-Dos and Schedule Views (Desktop & Mobile)

159987,159986: Previously, To-Do items and schedule views only displayed the employee's legal first and last name.

What's new: The option for having the employee's nickname (along with their last name) display on the schedule for any of the schedule views, as well as the To-Do items, is now available.

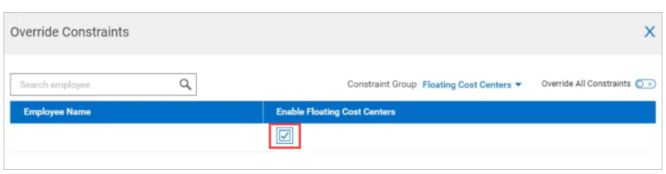
First confirm that the employee's nickname is entered in the employee's profile, then within the *Employee Information* widget on the Schedule Profile, enable *Use Employee Nickname*.

NOTE: The employee's first name will be used if the nickname is configured, but not defined for the employee.

New UI: Enabled Floating Cost Centers Override Constraints List to Remove Non-Floating Employees (Desktop & Mobile)

152459: Previously, when *Floating Cost Centers* was selected for *Constraint Group* from the *Override Constraints* window, a list of all employees who were already on the schedule would display.

What has been added: A new checkbox has been added to *Enable Floating Cost Centers*. When enabled, only the floating employees available (as opposed to all employees) will display on the schedule so that you can determine if you have extra resources.



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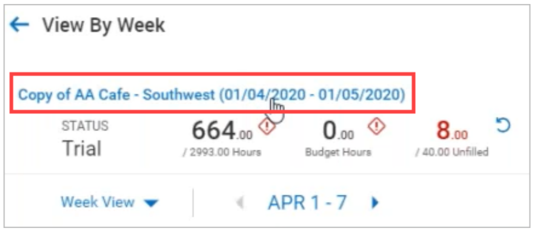
New UI: Link to Schedule Setting from Schedule Views (Desktop)

160007: A link has been added at the top of the page for all schedule views so that you can navigate back to the individual *Schedule* settings when you click the link.



New UI: List Daily Rules in Alphabetical/Numerical Order (Desktop & Mobile)

155118: For Basic Scheduler users, the daily rules will now be listed in alphabetical/numerical order for the following:

- Daily Schedule
- Weekly Schedule (Edit/Add Shift)
- List/Edit Schedule Entries
- Schedules widget

New UI: Schedule Overview Default Sort by Start Time of Shift (Desktop & Mobile)

155123: On the *Schedule Overview* screen, scheduled shifts will by default be sorted in order from the earliest start time to the latest.

Schedule Settings: Estimated Cost Did Not Calculate for Allocate Regular Hours V2 Rule

163063: For Pay Calc 2 companies, when a Pay Calc includes the *Allocate Regular Hours V2* rule, users who select to estimate labor costs on a schedule see correct *Estimated Cost* calculations in the *Pay Estimation* window. Previously, the *Pay Estimation* window's *Estimated Cost* column displayed zeros.