HR Release Notes

December 2020
R72

This document contains detailed descriptions of release notes for the release date/month shown above, as well as explanations of resolved issues.

Release Information

Release Dates

There will be a System Release taking place on the following dates and times for the following servers. System downtime for each respective release can be expected during the maintenance windows:

- **EU Server** – December 1, 2020 at 11:00pm - 3:30am GMT
- **POD 60** – December 1, 2020 at 11:30pm - 4:00am EST
- **U.S. Server POD2** – December 2, 2020 at 11:30pm - 4:00am EST
- **U.S. Server POD4** – December 9, 2020 at 11:30pm - 4:00am EST
- **U.S. Server POD5** – December 9, 2020 at 11:30pm - 4:00am EST
- **U.S. Server POD3** – December 10, 2020 at 11:30pm - 4:00am EST
- **U.S. Server POD6** – December 10, 2020 at 11:30pm – 4:00am EST
- **AUS Server** – December 10, 2020 at 12:00am - 4:30am AEDT

Supported Operating Systems and Browsers

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

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

Enhancements

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

The following enhancements have been added to this release.

Benefit Plans

Vendor Copy Column Added to Benefit Plans Report Page

WFR-198465: In the October 2020 system release (WFR-14701), a setting was created at the parent level of the benefit plan to allow the system to automatically copy employee level vendor information from one plan year to the next. As a benefit administrator, you can now easily see on the benefit plan listing page which plans have that setting enabled (*Company Settings > Profiles/Policies > Benefits > Plans*).

New **Benefit Plan: Vendor** columns can now be added to the report page via the *Select Columns* option. If there are multiple vendors, additional columns are available.

- Benefit Plan: Vendor Info 1
- Benefit Plan: Vendor Info 2
- Benefit Plan: Vendor Info 3

Checklists

Checklist Bell Count

WFR-202745: The My Checklist Bell Count will be restored to its previous functionality. This feature allows users to easily identify how many checklists have open items assigned to them by viewing the Bell Count.

IMPORTANT NOTE*: The Bell Count will not be available immediately following the system release. This functionality will be restored in a phased rollout over a period of several weeks.*

Compensation Management

Link Added for Loop Dependencies found within Organization Chart

WFR-196656: Loop dependencies can happen within a company's organization chart. For example, Monique is the boss of John and John is the boss of Monique; this loop dependency is a problem that will prevent Compensation Management from being used.

To solve this, when an error message is shown within Compensation Management, the error message will now contain a clickable link.

The link will open a pop-up Employee Information page, limited to only those employees with a loop dependency. Each employee listed will link out to their respective employee profile so corrections can be made to eliminate the loop.

Custom Forms

Employees Able to See Manager Notes on Modified Custom Forms

WFR-130547: When employees process their To Do Items from a Custom Form Workflow, those employees will now be able to see Manager notes as well as enter their own notes and upload documents when at the Modify step of the workflow. Notes can be accessed by employees from the footer of the To Do Item via the Notes icon and from the header of the form via the Notes icon.

Demographic Custom Fields

Default Value After Employee Creation

WFR-178985: Previously, when a Demographic Custom Field containing a default value was used to hire employees, the default value was not filled on the employee profile page. This applied to manual hire, hire through HR Action and employee import.
Now, when a Demographic custom field with a default value is defined in the Company (*Company Settings > Profiles/Policies > Demographic > Custom Fields*), this default value will now appear in that demographic custom field upon hire of the employee whether through manual hire, HR Action hire, API or import. This will function just as it does when a default value is entered into an HR custom field.

Employee Information

Training/Certification: Lookup List Added

WFR-182117: When adding trainings or certifications to an employee under Team > My Team > Employee Information, the method for selecting the items will be done through a lookup list, rather than a simple drop-down. This will allow for the accommodation of larger lists of 50+ items.

HR Actions

Limiting Codes Presented to Users for Position Assignment Action Item

WFR-156658: When adding the Position Assignment action item to an HR Action, the Position Assignment Change Reason codes presented to users assigned to the HR Action will be limited based on the type of HR Action. For example, a Hire or Rehire HR Action will only present Position Assignment Change Reason codes related to hiring; a demotion or termination code would not be presented as an option for these types of HR Actions.

Future Dated HR Actions for Pay Grades

WFR-192637: In an HR Action when the Pay Grade item is included, it brings in the Min/Max of the Pay Grade according to the rates in the Pay Grade as of today (the day the HR Action is being processed). In cases where the HR Action is future-dated, the pay grade Min/Max will now update as of that future effective date.

Imports

Employees Import: Personal Email Field Added

WFR-200353: In the October 2020 system release, Personal Email fields were added in various parts of the system and in employee profiles. In this release, we have added the **Personal Email** field to the Employees import template.

Managed Cost Centers

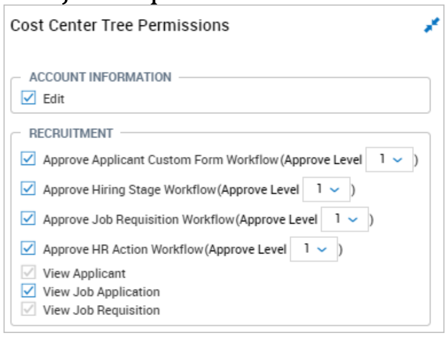
In the February 2020 system release, work was done to Managed Cost Center functionality to make it available in more areas of the application. This included adding a new Cost Center Managers widget to cost center maintenance under Global Setup where managers and permissions could be added.

In this release, we are continuing to expand this functionality by adding additional managed cost center functionality for HR Recruitment.

Setting Permissions in Cost Centers

The *Cost Center Tree Permissions* have been updated to reflect the options available for cost center managers. You can set permissions at the cost center level, which will trickle down to the managers. If managers should have different permissions from those set at the cost center level, each manager can be edited accordingly from their employee accounts.

When checking *View Job Application*, the *View Applicant* and *View Job Requisition* settings will automatically check and then gray out. This allows users to view applicant, job application, and job requisition links from the pages in Recruitment.



Permissions to Same Manager for More Than One Cost Center from Same Tree

WFR-151191: Permissions from more than one cost center tree can be granted to the same manager from within the Managed Cost Center widget.

Scenario 1

- CC2 is a child of the CC1 cost center tree.

- EMP1 is the manager of CC1 and CC2 via the Managed Cost Center (MCC) widget. The cost center permissions for CC1 and CC2 are set differently in the widget.
- CC2 is added to Job Requisition A.
- When EMP1 logs in, he will have access to the MCC relevant data pertaining to Job Req A; the permissions coming from CC2 in the MCC widget. Cost center permissions of CC1 are not relevant for this scenario.

Scenario 2

- CC3 is a child of CC2 and CC2 is a child of the CC1 cost center tree.
- EMP1 is manager of CC1 and CC2 via the Managed Cost Center (MCC) widget. The cost center permissions for CC1 and CC2 are set differently in the widget.
- CC3 is added to Job Requisition A.
- When EMP1 logs in, he will have access to MCC relevant data pertaining to Job Req A in accordance with the cost center permissions of CC2 (i.e. immediate parent cost center permissions are considered.) Cost center permissions of CC1 are not relevant for this scenario.

Import Templates: Employee Managed Cost Centers Template Updated/Moved

WFR-150395: The ***Employee Managed Cost Center*** import template has been updated to include the HR Recruitment permissions. Due to this addition, the category in which this template was located (*Time & Attendance Data*) will now be accessed from the *Employee Setup* category.

Permissions	View Applicant		1	Y/N	
	View Job Application		1	Y/N	
	View Job Requisition		1	Y/N	
	Approve Applicant Custom Form Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve Applicant Custom Form Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve Applicant Custom Form Workflow" permission will be enabled with the corresponding approve level.
	Approve Hiring Stage Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve Hiring Stage Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve Hiring Stage Workflow" permission will be enabled with the corresponding approve level.
	Approve Job Requisition Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve Job Requisition Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve Job Requisition Workflow" permission will be enabled with the corresponding approve level.
	Approve HR Action Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve HR Action Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve HR Action Workflow" permission will be enabled with the corresponding approve level.
	Edit (Account Information)		1	Y/N	

MCC & Workflows: Cost Center Manager Added to Applicant Custom Form Workflow Steps

WFR-145619: For companies with the HR sub-system enabled, System Administrators can now assign Cost Center Managers to certain steps in the *Applicant Custom Form* workflow (Workflow: *Custom Form* / Subtype: *Applicant*). This will allow the correct manager to act on a job application routed through the workflow.

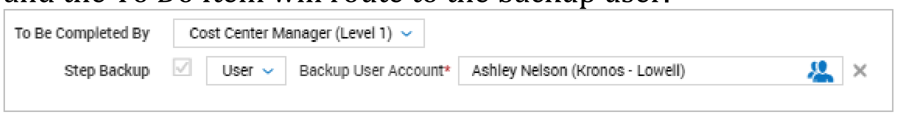
Applicant Custom Form Workflow

The Cost Center Manager option is now available to be selected in the following steps:

- Approve/Reject (available in the *To Be Completed By* field)
- Collect Note (available in the *To Be Completed By* field)
- Generate Email (available in the *Send Notification To* field)

MCC & Workflows: Cost Center Manager Added to Job Requisition & HR Action Request Workflows

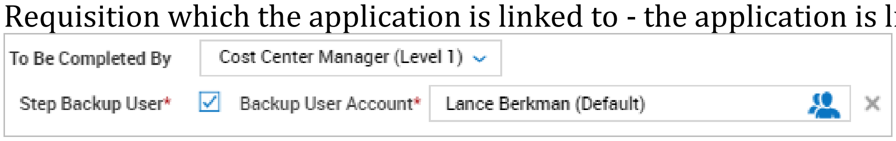
WFR-145694 & WFR-145702: In *Job Requisition* and *HR Action Request* workflows, the *Cost Center Manager* can now be selected for the *To Be Completed By* (or *Send Notification To* or *Create For* or *To Be Initiated By*) steps. When selecting a cost center manager, a *Step Backup User* will be required; so in the event the cost center manager is terminated, the workflow will not stall, and the To Do Item will route to the backup user.



- For the *Job Requisition* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, and *Checklist* steps.
- For the *HR Action Request* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, *Collect Note, Initiate HR Action Request* and *Checklist* steps.
  - In the *Managed Cost Centers* widget of employee accounts, when editing the permissions for a cost center, a new ***Approve HR Action Workflow (Approve Level 1-5)*** has been added to support the cost center manager assigned to an *HR Action Request* workflow.

MCC & Workflows: Cost Center Manager Added to Hiring Stage Workflow

WFR-145693: In the *Hiring Stage Change Request* Workflow, the Cost Center Manager is now available for selection in the workflow steps. They can be selected for the *To Be Completed By* (or *Send Notification To* or *To Be Initiated By* or *Create For*) steps. When selecting a cost center manager, a *Step Backup User* will be required; so in the event the cost center manager is terminated, the workflow will not stall, and the To Do Item will route to the backup user. The MCC manager is recognized in the workflow because the cost center is attached to the Job Requisition which the application is linked to - the application is linked to the applicant.

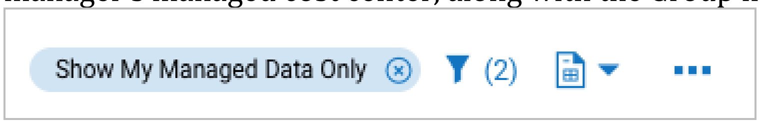


- For the *Hiring Stage Change Request* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, *Initiate Form, Initiate HR Action Request*, and *Checklist* steps.

MCC & Recruitment Reports: Filter Added to Reports for Cost Center Managers

WFR-145995, WFR-146126, WFR-146101, WFR-146100, WFR-146105, WFR-146106, WFR-150939, WFR-146113, WFR-146102, WFR-146115, WFR-146122, WFR-146103, WFR-146127, WFR-176785, WFR-146129:

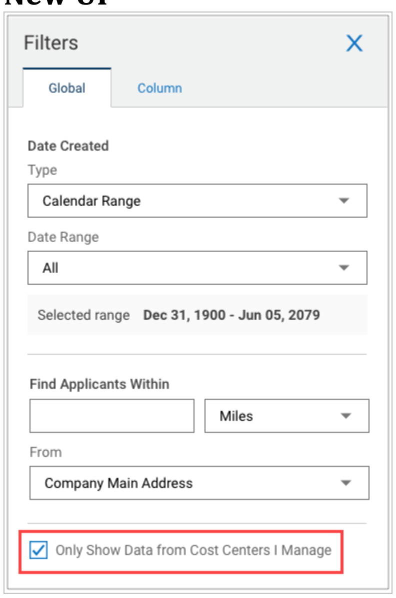
A new *Show My Managed Data Only* filter has been added to multiple Recruitment reports. When enabled, the filter will adjust the report data and display only information related to the manager's managed cost center, along with the Group members of managed cost centers.



- When the filter is disabled, the cost center manager will see all data to which they have access.
- The filter will be enabled by default when managed cost centers is enabled for the manager.
- For System Administrator (SA) login, and for other logged in users who have the MCC (Managed Cost Centers) widget disabled, the MCC filter will not be applied by default on the landing page of Recruitment reports. However, the option to apply the MCC filter will still be provided in Filters.
- If the MCC widget is enabled for the logged in user (whether or not the cost center is configured in the widget) the MCC filter will be applied by default in the reports.

When clicking the filter icon, the *Filters* panel will show the setting checked for that report.

New UI



The filter is available in the following reports.

Report	Classic UI Menu Path	New UI Menu Path
All Forms Report	*My Employees > Forms > All Forms*	*Team > Recruitment > Forms > All Forms*
Applicants Report	*Company Settings > HR Setup > Applicant*	*Team > Recruitment > Candidates > Applicants*

	Tracking/Recruitment > Applicants	
Applicant WOTC Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant WOTC*	*Team > Recruitment > Candidates > Applicant WOTC*
Applications Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Job Applications*	*Team > Recruitment > Candidates > Job Applications*
Applicant Interviews Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Interviews*	*Recruitment > Candidates > Applications*
Applicant Checklists Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Checklists*	*Team > Recruitment > Pre-Boarding > Applicant Checklists*
Applicant Checklist Items Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Checklists. Items are accessed from an icon within the report.*	*Team > Recruitment > Pre-Boarding > Applicant Checklist Items*
Applicant Questionnaire Answers Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Questionnaires. Answers are shown in the Question Answer column of the report.*	*Team > Recruitment > Candidates > Applicant Questionnaire Answers*
Applicant Forms Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Forms > Applicant*	*Team > Recruitment > Pre-Boarding > Applicant Forms*
Background Checks Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Background Check > Background Checks*	*Team > Recruitment > Pre-Boarding > Background Checks > Background Checks*

Background Check History Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Background Check > Background Checks History*	*Team > Recruitment > Pre-Boarding > Background Checks > Background Check History*
Job Requisitions Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Job Requisitions*	*Team > Recruitment > Job Requisitions*
Time To Hire Report	*My Reports > HR > Recruitment > Time to Hire*	*Team > Recruitment > Reports > Time To Hire* *Or* *My Info > My Reports > Recruitment Reports > Time To Hire*

National ID

Benefit Reports: France National ID Dependent Columns Added to the Dependents Report

WFR-173099: Within the *Dependents* report, located under *Team > Benefits > Dependents*, you can now add the following Dependent National ID columns to the report: **Dependent Social Security Number (France)** (must have France enabled in company) and **Dependent Other National ID Type (1-10)** columns (available for all companies). Users must have security permission to *Other National IDs* and *Social Security Number (France)*, as set in the HR tab of security profiles.

Imports: Employees Contacts Import Template Updated with National ID Fields

WFR-195327: The *Employees Contacts* import template has been updated with a **National ID** columns and related instructions. This allows the new *Dependent Social Security Number (France)*, or *NIN* and the *Dependent Other National ID Type (1-10)* as well as any other National ID number information to be imported. These fields and import template are valid for both single and multi EIN companies.

	A	B	C	D	E	F	G	H	I	J	K
1	Employee Match										
2	User Name	Employee ID	Employee External ID	Social Security Number	Social Insurance Number	National Insurance Number	Tax File Number	Citizen Service Number	Social Security Number (France)	EIN Tax Id	EIN Name
3											
4											
5											

6	Field Name	Required	Length	Valid Formats	Description
7	Username	Yes			At least one of UserName, EmployeeID, SSN, SIN, NIN, TFN, BSN, NSS, Other National Id and Employee External Id is required. They are used in order of their appearance to validate the data. That is, UserName is used first, EmployeeID is used second, Employee External Id is used third, and National ID fields are used last.
8	Employee Id	Yes			
9	Employee External Id	Yes			
10	Social Security Number	Yes		###-##-####	
11	Social Insurance Number	Yes		###-###-### #########	
12	National Insurance Number	Yes		## ## ## ## # #########	
13	Tax File Number	Yes		########	
14	Citizen Service Number	Yes		########	
15	Social Security Number (France)	Yes		############## ##, ###############	
16	Other National ID	Yes			
17	EIN Tax Id				For Multi-EIN companies. If it's impossible to identify an employee by employee id, SSN or employee external id then employee's EIN has to be specified using one of these fields.
18	EIN Name				

Notifications

Reminder Notification for Expired Visas

WFR-179560: A new **Visa Expiration** notification is now available under *Company Settings > Global Setup > Notifications* in the *Account* category. The notification can be configured to warn the selected recipients of an employee's expiring visa; providing that visa information is listed in the Account Demographics widget of employee accounts.

Pay Grades

Automatic Pay Grade Steps Import: Adding Pay Grades with Automatic Steps Supported

WFR-190092: Pay Grades with Automatic Steps are now supported in the Automatic Pay Grade Steps import. After adding the auto step configuration fields, the associated automatic steps can be added. Supported fields include Effective Date, Step Name, Duration Days/Duration Weeks/Duration Months/Duration Years, and Rate Change.

- The Pay Grade ID is used as the primary identifier.
- Pay Grade Name is used as the secondary identifier.
- Since there is no requirement for the Pay Grade name to be unique, there can be multiple pay grades with the same name. In this case, the auto steps are added to the pay grade which has the specified name AND is returned by the Data Base first.
- If a Pay Grade cannot be found by ID or by Name, the new Pay Grade is created.

	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		Auto Step Configuration					Automatic Steps						
2	Currency	Change Rates on Effective Date	Calculate From	Use	Pay Change Effective Date Type	On	Effective Date	Step Name	Duration Days	Duration Weeks	Duration Months	Duration Years	Rate Change
3													
4													
5													
6													
7													

Warning Message Added When Changing Step and Grade via Mass Edit

WFR-177534: When a Pay Grade is selected in the Pay Information widget on the Mass Edit page for employee profiles, an inline warning message is shown to the user. The message reads: "The selected Pay Grade can affect existing Automatic Pay Grade Steps".

- If a Default Job is added and contains a Default Pay Grade, the message will appear.
- In the Cost Centers widget, if a Default Cost Center is added and contains a Default Pay Grade, the message will appear.

Performance Management

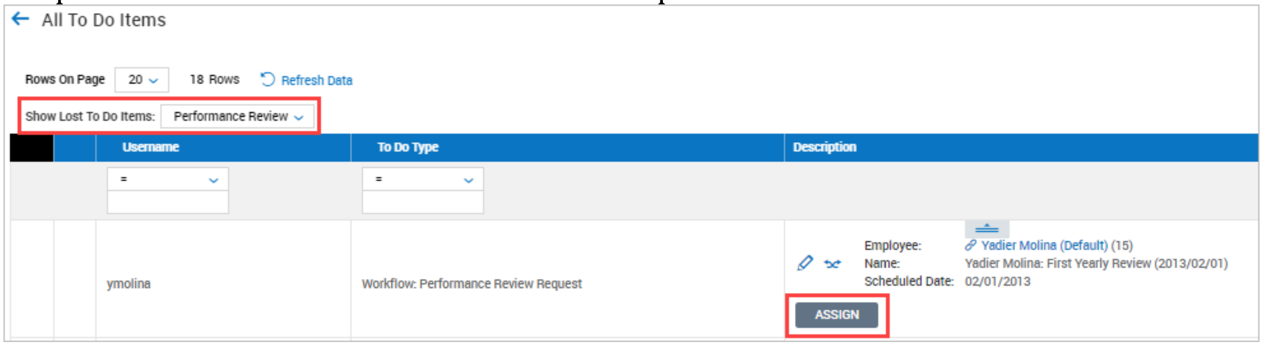
All To Do Items Report: Viewing Lost/Unassigned Performance Review To Do Items

WFR-155356, WFR-200594: To help administrators and managers track performance review workflow To Do Items that were not properly configured with a manager or back-up user, that would cause the To Do Item to not be assigned and become lost, the All To Do Items report will now have an option to view those lost To Do Items.

From the All To Do Items report, located under *My Info > My Reports > System Reports > System Utilities > All To Do Items*, a **Show Lost To Do Items** selector will now be available to view these items when selecting **Performance Review** from the selector drop-down. The items displayed will give the option to **Assign** the lost item to a valid user. That user will then get the To Do item assigned to them and it will appear in their Mailbox To-Do Items and will appear on the All To-Do Report now as a valid To-Do Item vs. a Lost To Do Item.

In the Lost To Do view, the *Select Row* and *Delete To Do Item* checkboxes will not be available in the row-level actions and the *Delete To Do Items* and *Delete All To Do Items* buttons will also not be available from the top of the page. The reason for this is due to the status of the items being lost and they were never created/sent to a specific person. You would need to delete the performance review from the actual Performance Reviews page, which will then delete it from the All To Do Items report page.

NOTE: Currently the All To Do Items report is only available in the desktop experience. There are plans to make this available in the mobile experience in a future release.



Bulk Download of Performance Reviews

WFR-124926: From the Performance Reviews report page, multiple performance reviews can now be selected and then downloaded as a PDF. All selections will display in a single PDF. Previously, you had to open each review and download.

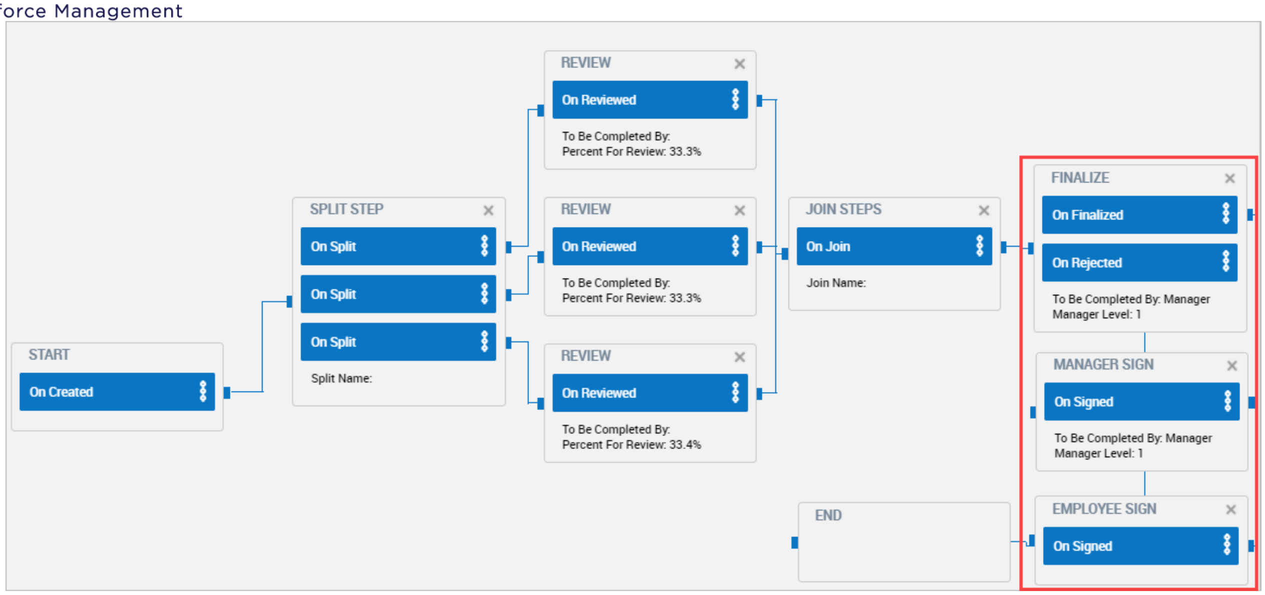
Performance Reviews: Adding Notes and Documents Any Time in Review Process

WFR-99922, WFR-170356: Once a performance review is created, both managers and employees can add notes or upload supporting documents at any time during the review cycle using either the notes or documents icon on any of the tabs in the review. Once the review is finalized/ended this will not be allowed. Previously, both managers and employees were restricted from adding notes or uploading supporting documents until it was their turn in the review process.

Performance Reviews: E-Sign of Reviews After Finalizing

WFR-7724: Historically, e-sign functionality only allowed employees to e-sign their review if they were part of the workflow and this could only happen before it had been finalized. You will now be able to let employees e-sign their review after it has been finalized, i.e., after the manager and employee have met and discussed the review.

- Managers are not required to be part of the review steps piece of the workflow but can still sign if they are associated to the Manager sign step.
- Using the E-sign framework for employee and manager, the administrator can add the Sign steps in the workflow that would come after the finalizer step allowing a user to e-sign before the finalizer step.
- When the E-Sign button is clicked on either Employee or Manager sign steps, it will automatically bring the user to the Summary tab instead of the Instructions tab first.
- The message piece on the manager sign and employee sign steps that state "and before the "Finalize" step" has been removed. This piece of the step message was a reminder to include sign steps prior to the Finalize step and no longer applies.



Review Profiles: Date Flexibility – Default Job Change Date Option Added

WFR-102552: A new **Default Job Change Date** option was added to the **Anchor Date** drop-down list of options. The benefit of this new option is that since a performance review profile can be automatically added as a result of a Default Job, now the proper dates based on the job change will automate the proper dates for the performance review of that new job.

- All new profiles will default to ***Review Date*** in the *Anchor Date, First Review [From], Review End [From],* and *First Review Start Date* fields, but can be edited to different dates.

To provide additional flexibility, any Custom Dates enabled in the *Account Custom Dates* widget of Company Setup will also display in the drop-down list of date options.

Performance Review Workflow: Visibility Options for Reviewees

WFR-99094: Based on configurations, employees historically have been allowed to view feedback from all managers, both while in progress and at the completion of the review.
In the **Use Visibility Settings For Reviewee** section of the **Review** and **Check** steps of Performance Review workflows, we have updated the logic so when these settings are enabled in one step, the logic will be retained on each subsequent Review or Check step in the workflow and the settings will be visible in those subsequent steps to the workflow creator(s).
For example, if you have three Review steps in a workflow, and on Review Step 2 you enable the visibility settings for reviewees, those settings will carry forward to Review Step 3, will be viewable to the workflow creators in workflow configuration but will be grayed out and read-only so the settings cannot be changed.
These workflow visibility settings for reviewees override any visibility settings in the Options widget of the employee's assigned performance review profile. . If the workflow doesn't have the visibility settings enabled, the profile will determine what they can see.

Performance Review Workflow: Visibility Options for Reviewers

WFR-185215: If you enable **Use Visibility Settings For Reviewer** in a performance review workflow, at least one option must be selected. These settings do not carry forward when you have multiple review steps configured. You can set different visibility settings for each review step. In the manager's To Do Item and under *Team > Performance Review*, they will only see the settings enabled in the workflow.
These workflow visibility settings for reviewers override any visibility settings set in the *Options* widget in the user's assigned performance review profile. If the workflow doesn't have the visibility settings enabled, the profile will determine what they can see.

Position Management

Reports: Default Column Changes in Position History Report

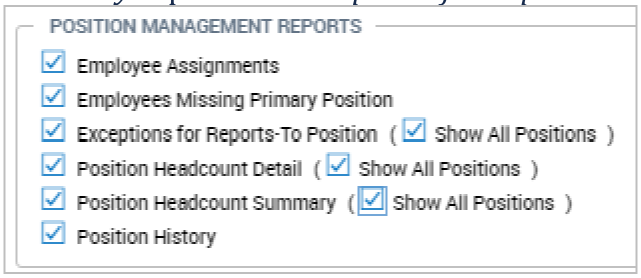
WFR-198767: The following default columns in the Position History report have been added.

- Position Name
- Employee Full Name

Additionally, the Employee ID has been removed as a default column but can be added via the *Add/Remove Columns* option.

Security: 'See All Positions' Options Added for Position Reports

WFR-152942: A new **Show All Positions** security setting has been added to security profiles that will allow users to view position assignment details and exception reporting that goes beyond the user's set hierarchy of positions.
The setting is located in the *Position Management Reports* widget on the *Reports* tab of security profiles and affects the *Position Headcount Detail* report, *Position Headcount Summary* report and *Exceptions for Reports-To Position* report.



Recruitment

Offer Letters

EPIC WFR-181802, EPIC WFR-181785
A new ***Offer Letters*** option is now available to support creating and maintaining offer letters for both internal and external applicants. The option is located under *Team > Recruitment > Offer Letters*. The letters contain pre-defined text with multiple system tags that will auto-fill

account and system data. You can edit the text with a full HTML text editor and can add other tags. These letters will be sent via email to the recipient(s) using the email address on file for the applicant.

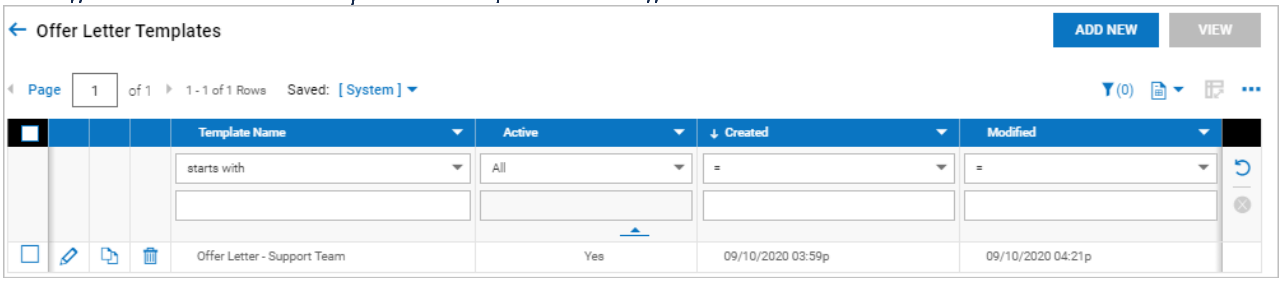
Offer Letters: Security

New security settings have been added to control user access to Offer Letters and Offer Letter Templates. In the *Recruitment* section under the *HR* tab of security profiles, two new settings can be set to either *View* or *View/Edit*, plus the ability to *Add/Delete*. The settings are:

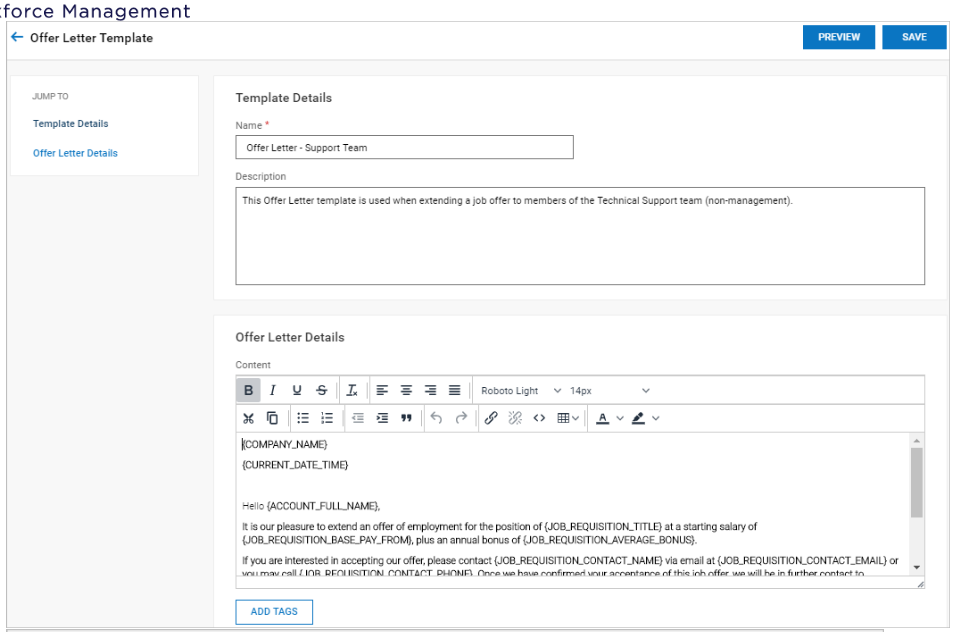
- Offer Letter Templates
- Offer Letters

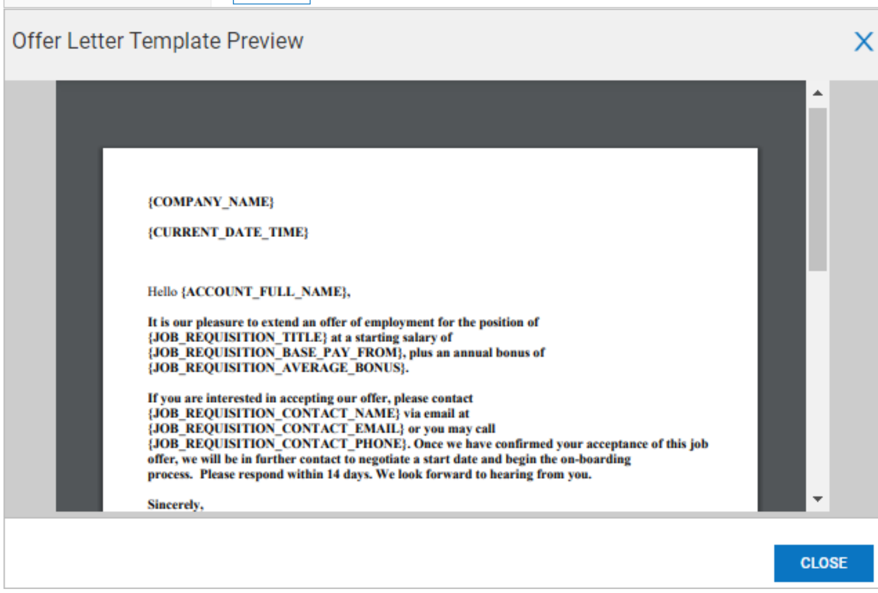
Offer Letters: Templates

Offer letters can be saved as templates and reused to create new letters. A new menu option to create and maintain offer letter templates is available under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Templates Library > Offer Letter Templates*. Templates have a full HTML text editor complete with system tags that can be added to the body of the letter. The report page has standard features of viewing, editing, cloning, deleting, and adding. If the template is in use, users will receive a warning message; *This template has been used # time(s) in the Offer Letters and the template name from these offer letters will be removed. Proceed?*



Each template is divided into *Template Details* and *Offer Letter Details*. A *Preview* option allows you to see how the letter will look. The preview will show the tags used; once assigned to a recipient, the tags will be replaced with system information stored for the job requisition and/or applicant (if there is no system information for a tag used, the preview will just retain the tag so that the user can make necessary changes or replace tag with data, if required.)





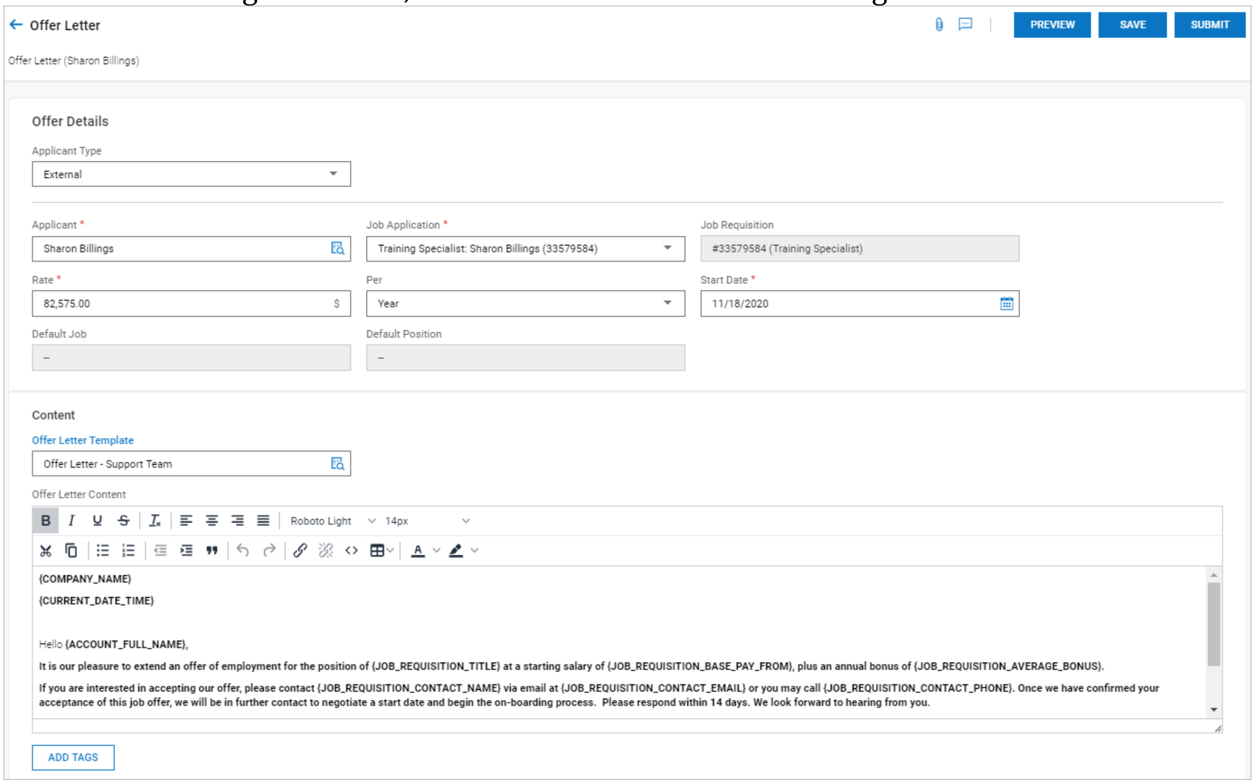
Offer Letters Page - Create and Maintain Offer Letter for Applicants

The offer letter is tied to a Job Application. When the letter is ready, it is created against an applicant based on the Job Application on file for that applicant.

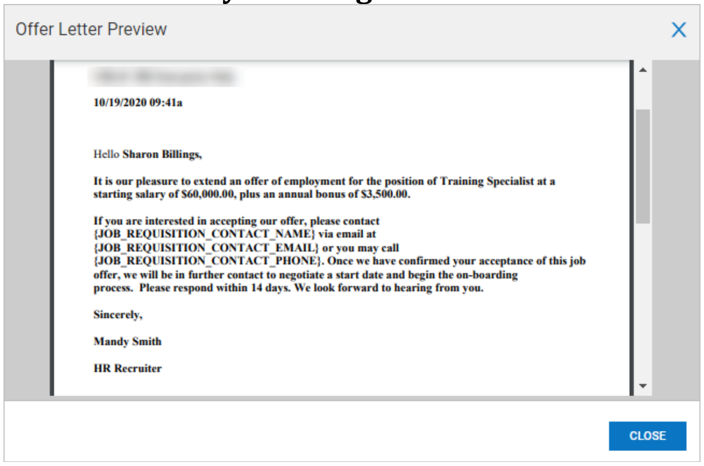
HR Managers can create and manage Offer Letters under *Team > Recruitment > Offer Letters*. Here, Offer Letters can be created for applicants (internal or external.) Offer Letter Templates can be selected here and will populate the Offer Letter Content section. Even when using a template, edits can be made to the content if needed.

Once saved, options will become available to add documents and notes, preview the letter using the applicant information and system information. If system tags are in use that are not in the applied job requisition, those will appear in tag format. You can edit the job requisition and add the necessary information and then come back and see the information has been added to the preview.

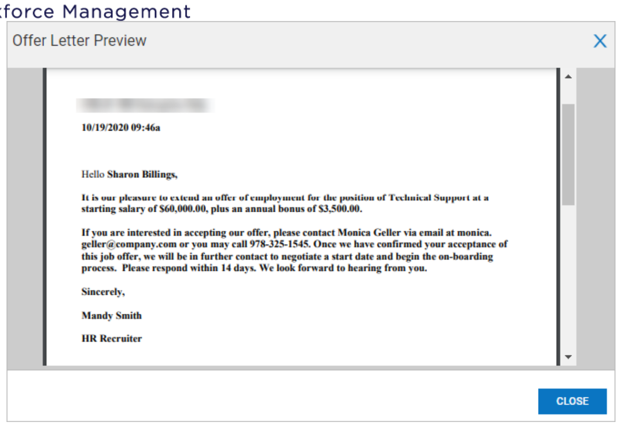
NOTE: When saved, the offer letter will be in draft state and it can be saved any number of times before being submitted, which is when final offer letter is generated.



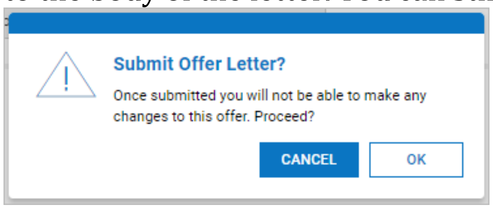
Offer Letters: System Tags – Information not included in Job Requisition



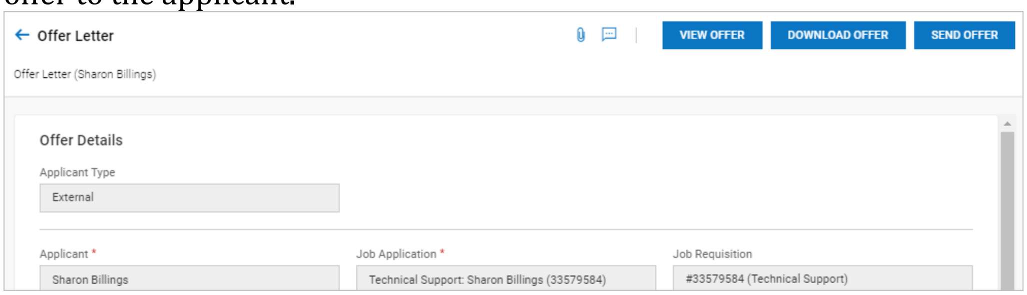
Offer Letters: System Tags – Information complete in Job Requisition



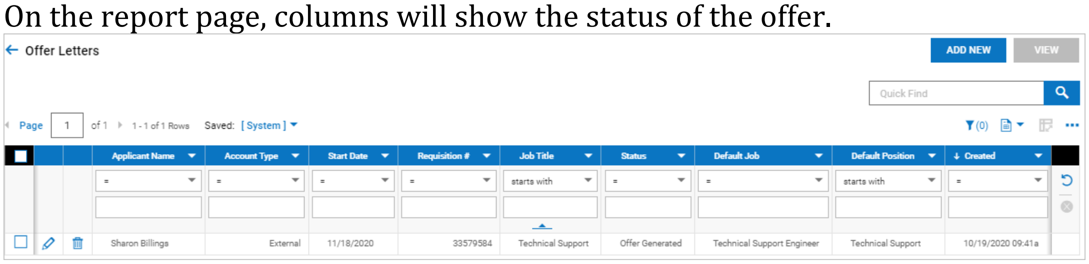
Once the offer letter is ready, it can be submitted by selecting the *Submit* button. Once submitted, the offer letter will be completely grayed-out and no further editing can be applied to the body of the letter. You can still add supporting documents and notes.



From here, you can view the offer (preview window), download the offer to PDF, and send the offer to the applicant.



On the report page, columns will show the status of the offer.



Offer Letters: Job Applications

If a Job Application is in use in an Offer Letter, and users attempt to delete those job applications, a message will be displayed to the user; *Could not delete. It is used in Offer Letter.*

Recruitment & Position Management

Position Fields Added to Recruitment Report Pages

WFR-198767: For companies with both Recruitment and Position Management enabled, new Position fields can be added via the *Add/Remove Columns* option.

- **Job Requisition Report Page**: Position Abbreviation
- **Time to Hire Report**: Position Abbreviation

Recruitment Questionnaires

Questionnaires Available for Internal Applicants

WFR-182715: In a previous release, we communicated about application questionnaires being available in the applicant portal for external candidates only. In this release, those questionnaires will now be available for internal applicants as well.

Warning Message Icon Added to Questionnaire Link

WFR-156101: When there is a warning message prompting the user about open Recruitment Evaluation questionnaires to be completed, a warning icon will now also be displayed next to the Questionnaire link in the left jump link panel.

Reports

Course/Certification Fields Added to Training/Certification Report

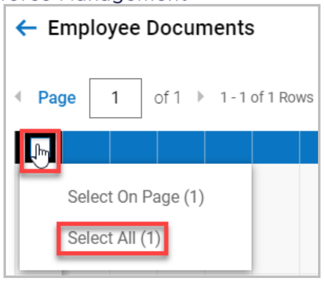
WFR-192311: Three fields from the Course/Certification configuration have been added to the Training/Certifications report (*Learning > Training/Certifications*) so users can have more complete information in one report. The following fields can be added via the *Add/Remove Columns* option.

- Code
- Deduction (requires Payroll sub-system)
- Vendor (requires Payroll sub-system)

Select All Option in Multiple Report Pages

WFR-101646: Users can select all rows in the Employee Documents report page, whether the rows are on the current or other pages, by using the **Select All** action. The top-left checkbox, at the header level, provides the *Select All* action.
When selected, a pop-up provides the ability to *Select On Page* or *Select All*. When the *Select All* checkbox is enabled, the top-left checkbox and all row-level checkboxes remain selected when a user navigates to multiple pages of rows within a report.

- **Employee Documents** report page (*Team > HR > HR Maintenance > Employee Documents*)


Employee Documents
Page
1
of 1
1 - 1 of 1 Rows
Select On Page (1)
Select All (1)

Bug Fixes

The following issues have been resolved in this release.

Announcements: *Platform* field was no longer needed

WFR-147623: When users create an Announcement (at *Company Settings > Our Company > Announcement*), the *Platform* field no longer appears, because it was used to select between Classic UI and New UI, which is no longer needed.

Benefit Enrollment: *View/Edit Child* button did not open window

WFR-198262: On the *Benefits Change Request* page, when users clicked the *View/Edit Child* button for a child record that had no fields that could be edited, the pop-up window for editing did not open. This has been fixed, and the *View/Edit Child* button now does not display for records that don't have editable fields.

Benefit Enrollment: Security Violation for Admins completing Benefit Questionnaire

WFR-201802: When Administrators tried to complete their open enrollment and reached a Benefit Questionnaire, they sometimes received a *Security Violation* error and could not complete the enrollment. This is fixed, and these users now can complete the Benefit Questionnaire and their enrollment.

Benefit Enrollment: Update to *As Of Date* field didn't seem to save

WFR-204075: In a *To Do* item to approve an auto-enrollment, when a user edited the *As Of Date* field for the approval, the date was not saved to the *Coverage Effective From* field in the employee's benefit plan. This is fixed and editing the *As Of Date* now updates the *Coverage Effective From* field as expected.

Benefit Enrollment: Submit button was grayed out

WFR-205532: In Open Enrollments and Life Change Events that include a Passive Enrollment Option and also use Include or Exclude rules, the final Submit button was grayed out so that it couldn't be used. This is fixed, and the Submit button now functions as expected with these configurations.

Benefit Reports: Error occurred when downloading Enrolled Benefits Document

WFR-188633: Users who attempted to download the PDF of an Enrolled Benefits Document that included one or more deleted coverages received an *Internal System Error*. The system is now updated so that a benefit coverage cannot be deleted if a submitted, approved, or completed change request is linked to the coverage.

Custom Forms: Error occurred for HR Actions with many custom form fields

WFR-208822: Users who started an HR Action that included a custom form with a large number of fields sometimes received an *Internal System Error*. This is fixed, and users can now complete these HR Actions as expected.

Direct Deposit: Invalid BSB Number error occurred for Australian users

WFR-204630: The system gave the error *Invalid BSB Number* when Australian users entered a valid BSB number for Direct Deposit. This is fixed, and the system now recognizes the BSB number without errors.

Employee Information: Page could not be viewed or saved

WFR-185719: In rare cases where an employee was configured with duplicate External IDs and their employee record included the *Pay Information* widget, the record could not be viewed or saved because of the error *Something went wrong with a widget on this page*. This is fixed, and after the employee is reconfigured to have only one External ID, the employee record displays and saves as expected.

Exports: Number of Deductions per Year column displayed 0

WFR-196329: In *Data Exports*, when users create a benefit plan export file that includes the *Number of Deductions per Year* column, the column displays the expected values in the export. Previously, this column sometimes displayed 0.

HR Action: Document upload date was incorrect after saving

WFR-150688: In an HR Action with a Document field, after uploading the document and saving, the Uploaded On date for the document changed to one day before the actual upload date. This is fixed, and the Uploaded On date now displays the correct date.

HR Action: Training disappeared after approval of HR Action

WFR-183083: An issue has been fixed that sometimes caused an employee's Training information to be removed after an HR Action was approved. This is fixed, and the system no longer removes the Training information.

Incidents: Search results displayed all company employees

WFR-189310: On the *Add New* page for Incidents, when users type characters to search in the *Employee* field and then click *View all results*, the list of results includes only employees matching the searched characters. Previously, clicking *View all results* displayed all employees in the company.

Jobs: Reason Code was automatically populated after Default Job was entered

WFR-183864: On an employee profile's *Pay Information* tab, selecting a value in the *Default Job* field now leaves the *Reason Code* field blank, as expected. Previously, selecting a value in the *Default Job* field caused the *Reason Code* field to automatically populate to a random reason code.

Multi-EIN: *Other National IDs* option was missing from ESS tab

WFR-196338: In the HR SBE, Payroll, Scheduler, and TLM modules, the security profile *Security Items* widget's *ESS* tab includes *Other National IDs* as an option, as expected. Previously, *Other National IDs* was missing from these locations.

Performance Management: Check step resulted in error

WFR-202914: In a Performance Review workflow with a *Check* step, users who clicked *Check* in their *To Do* item sometimes received an *Internal System Error*. This is fixed, and users can click *Check* and proceed as expected.

Performance Management: Translation updates were needed on *My Performance Review*

WFR-205965: On the *My Performance Review* page, the following translations are updated for French users:

- *Competencies* is updated to *compétences*
- *Sign as employee* is updated to *Signature de l'employé*

Recruitment: Company name in Indeed wasn't exactly correct

WFR-199199: The system now uses the name set in the *Company Name on Indeed* field (in *Job Board Configuration*) as the company name in Indeed, as expected. Previously, the name in Indeed was sometimes slightly different because the system used the *EIN Legal Name*.

Recruitment: Add Resume section had inaccurate directions

WFR-182228: When applicants apply to a job listing, the *Add Resume* section's directions included some inaccurate text, such as *...select Choose to search and upload a new file*. The inaccurate directions have now been corrected or removed as needed.

Recruitment: Job Description text was cut off

WFR-191813: In an applicant custom form (*Team > Recruitment > Other Forms*), the *Job Description* field sometimes did not wrap text correctly and cut off portions of text. This is fixed, and the *Job Description* field now displays all text as expected.

Recruitment: Admin couldn't assign New Hire checklist to applicant

WFR-201739: When an Administrator assigned a New Hire checklist that included a custom form to an applicant, the error *The application is unable to process your request* sometimes occurred. This is fixed, and the system now assigns the checklist as expected.

Recruitment: System didn't send notification after application through Indeed

WFR-202861: When applicants applied for a position through Indeed, the system did not generate the *Applicant Applied For Position* notification. This is fixed, and the system now sends this notification as expected.

Workflows: Cloned company was missing an HR Action

WFR-205541: When administrators cloned a company that included a workflow with an HR Action Request, the clone sometimes did not include the HR Action. This is fixed, and the HR Action now copies to the new company during the clone process.

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