Cross Product Release Notes

April 2021
R74

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

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R74 Cross Product Release Notes

This document contains detailed descriptions of release notes for the specified release, as well as explanations of bug fixes.

Release Dates

A System Release will take 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:** April 05, 2021 at 11:00pm - 3:30am BST
- **POD 60:** April 06, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD2:** April 07, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD5:** April 21, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD4:** April 21, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD3:** April 22, 2021 at 11:30pm - 4:00am EDT
- **AUS Server:** April 22, 2021 at 12:00am - 4:30am AEST
- **U.S. Server POD6:** April 22, 2021 at 11:30pm – 4:00am EDT

Supported Operating Systems and Browsers

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

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

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

Android	6.0.1-> latest

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

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.

Only for United States: The **Affordable Care Act** features below are applicable for U.S. users only.

Affordable Care Act (ACA)

2020 Changes to DC ACA Reporting

WFR-221644: The system now has the updated version of the file specifications for the healthcare reporting files required by the District of Columbia, which allows users to submit their file electronically with no errors. The following apply:

- The new field for **Employee's Age on January 1** that appears in the header of Part II on the printed version of the Form 1095-C has been added to the DC format. This appears in the DC file between the **ALE Contact Phone Number** and the **Plan Start Month**. The field is numerical only, and two digits in length if it is populated. If it is blank on the Form 1095-C, this field is still included in the DC file as a blank field.

- For Line 14 of the Form 1095-C, the new codes introduced on the 2020 Form 1095-C are now supported by the DC File. These new fields include 1L, 1M, 1N, 1O, 1P, 1Q, 1R, and 1S.

- The new Line 17 **Zip Code** field has been added to the DC format. This appears in the DC file between the **DecSafeHarborCd** and **CoveredIndividualAnnualInd** fields, and there are 13 entries total for this (one for the annual plus one for each month). This field is numerical only, and five digits in length if it is populated. If any of the 13 fields are blank on the Form 1095-C, they are still included in the DC file as a blank field.

California ACA Reporting

WFR-207120: California has introduced their own type of healthcare reporting that is due for the first time for the tax year 2020. The file format is similar to the Federal XML file, and like the Federal filing, test filings must be done first. All three options to **Generate CA ACA**, **Generate CA Test File1** and **Generate CA Test File2** are showing properly under the ellipses of the last step of the Generate AIR Files process.

WFR-207284: The system provides the first test file required for CA healthcare reporting to be sent directly and perform the first required test. The filing requires two test files (whereas the Federal filing only requires one test), so these test files have been introduced in the system.

The first test file is similar to the IRS AIR TCC Communication Test file, only it is updated with all of the CA specific field labels. As with the IRS' test file, this is filled with dummy data and is validated character by character. When a user selects the **Generate CA Test File 1** option under the final step of the Generate AIR Files process found within the ACA Year End Processing Checklist, s/he is presented with a pop-up similar to a combination of the pop-up presented when a user selects the **Generate DC ACA** option and when they click on the TCC and Software ID button. California issues employers their own separate TCC (Transmitter Control Code) and there are actually separate TCC's issued to the employer for testing and production. The **Transmitter Control Code (TCC)** field allows a maximum of five characters and only allows letters and numbers (no special characters).

If the user does not enter any value or enters an incorrect value, the pop-up refreshes and an error message in red explains **A valid California TCC code must be entered before this file can be generated**. Users cannot successfully click OK until the TCC is formatted properly. Once the user selects the **Generate CA Test File 1** option under the final step of the Generate AIR Files process found within the ACA Year End Processing Checklist, and the user has entered a valid **Transmitter Control Code (TCC)**, the file generates successfully.

WFR-230462: As mentioned in the validations for the test files, in the California ACA file, the Transmitter Control Code (TCC) accepts only 5 digits with the pattern [0-9A-Fa-f].

WFR-207286: The second test file is also similar to the IRS AIR TCC Communication Test file, only it is updated with all CA specific field labels and it is for corrected forms. As with the IRS' test file, this is filled with dummy data and is validated character by character. When a user selects the **Generate CA Test File 2** option under the final step of the Generate AIR Files process found within the ACA Year End Processing

Checklist, a pop-up displays. A blue information bar reads **Enter the California Testing TCC, The Receipt ID from your first CA ACA Test File, and press "OK"**.

The **Transmitter Control Code (TCC)** field allows a maximum of five characters, only allows letters and numbers (no special characters), and is required. If the user does not enter any value or enters an incorrect value, the pop-up is refreshed and an error message in red explains that **A valid California TCC code must be entered before this file can be generated**. The user cannot successfully click **OK** until the TCC is formatted properly.

The **Receipt Id** field is required. If the user does not enter any value or enters an incorrect value, the pop-up is refreshed and an error message in red explains that **A California Receipt ID must be entered before this file can be generated**. The user cannot successfully click **OK** until the Receipt ID is entered. If the user does not populate both the **Transmitter Control Code (TCC)** and the **Receipt ID** fields, both error messages display.

When the user selects the **Generate CA Test File 2** option under the final step of the Generate AIR Files process within the ACA Year End Processing Checklist, if the user has entered a valid Transmitter Control Code (TCC) and a valid CA Receipt ID, the file is generated successfully.

WFR-207270: The California filing itself consists of a Manifest and Form Data File, the same as the Federal AIR filing. The system guides users when creating a live production file so they can be sure that their file is being created accurately, allowing them to file without incident.

When a user selects the **Generate CA ACA** option under the final step of the Generate AIR Files process found within the ACA Year End Processing Checklist, s/he is presented with a pop-up similar to a combination of the pop-up presented when a user selects the **Generate DC ACA** option and when the user clicks on the TCC and Software ID button. California issues employers their own separate TCC (Transmitter Control Code), and there are separate TCC's issued to the employer for testing and production.

The **Transmitter Control Code (TCC)** field allows a maximum of five characters and only allows letters and numbers (no special characters). If the user does not enter any value or enters an incorrect value, the pop-up is refreshed and an error message displays in red explaining that **A valid California TCC code must be entered before this file can be generated**. The user cannot successfully click **OK** until the TCC is formatted properly. Once the user has a correct TCC entered, the CA ACA file is generated.

California Form Data File

WFR-207118: California has introduced their own type of healthcare reporting that is first due for the tax year 2020. The file format is similar to the Federal XML file, but there are some differences between the AIR Form Data File and the California Form Data File, such as:

- There are many fields where the name needs to be changed within the header information, the 1094-C/Employer Information, and the 1095-C/Employee Information.
- Several fields that are required on the AIR XML are not required on the CA XML.
- Several fields are new to the CA XML (they are not in the AIR XML).

- A new section for Health Care Return Header
- A new line for timestamp in the CA file
- A new group in the CA file for 1094-C
- The CA file has a new group for hci:Name
- There are several differences between the CA XML and the AIR XML.
- The CA phone field within hci:Name group (The Federal file is after ContactNameGrp closes)
- The CA file closes out hci:IRSForm1094C
- The CA hci:PlanStartMonth field within hci:EmployeeOfferofCoverage group (The Fed file has StartMonthNumberCd field as its own separate line, not in any group)

California Manifest File

WFR-207121: California has introduced their own type of healthcare reporting that is first due for the tax year 2020. The file format is similar to the Federal XML file, but there are some differences between the AIR Manifest File and the California Manifest File. The CA version requires a lot less information, and differences include:

- The first line remains the same and will always be **<?xml version="1.0" encoding="UTF-8"?>**.
- The second line is completely different. It will always be **<fx:TransmissionManifest xmlns:fx="https://api.ftb.ca.gov/fx_2020" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="https://api.ftb.ca.gov/fx_2020 ../TransmissionManifest.xsd">**.
- The CA Manifest file includes the Timestamp field, but the label is different**.** This reflects the system date/time the file is generated.
- The CA Manifest file includes the Unique Transmission Id field, but the label is different. There are significant differences from the AIR file:
    - From the start and the first, this is the same as with the AIR file. It is the same format with the five sections separated by dashes.
    - In the second section between the first and second, the numbers 0001 always appear. This differs from the AIR file which always displays as SYS12.

    - In the third section between the second and third, the California TCC code that is entered while generating the file appears the same as with the AIR file. The Transmission Id ends here, differing from the AIR file where there are two additional sections.

- The CA Manifest file includes the <irs:ChecksumAugmentationNum> field, but the label is <fx:TransmissionChecksum>.

- The CA Manifest file includes the <AttachmentByteSizeNum> field, but the label is <fx:TransmissionByteSize>. This is formatted and populated the same as with the AIR file.

- The CA Manifest file includes the <TestFileCd> field, but the label is <fx:TransmissionCategory>. This is populated with the same T and P values as the AIR file. In this case, "P" is always used as the test files are character specific.

- The CA Manifest file has a stagnant line of <fx:TransmissionSchemaVersion>InformationReturns_v1.0</fx:TransmissionSchemaVersion>

- The CA Manifest file includes the <FormTypeCd> field, but the label is <fx:Formtype>. This is populated with "IRS1094-1095C" instead of the "1094-1095C" value as in the AIR file.

- The CA Manifest file includes the <TotalPayeeRecordCnt> field, but the label is <fx:SubmissionCount>. This is populated with the same value as the AIR file.

Announcements

Linkable Entries in Visible To Columns

EPIC WFR-139533

WFR-211558: The data that populates the **Visible To Group** and **Visible To Security Profile** columns in the **Announcements (Maintenance)** report page will now by hyperlinked. This can also be accessed via the **Announcements** button in Dashboard Layout Profiles.

- In the **Visible To Group** column, clicking the entries will take you to the **Edit Dashboard Layout Profile** maintenance page.

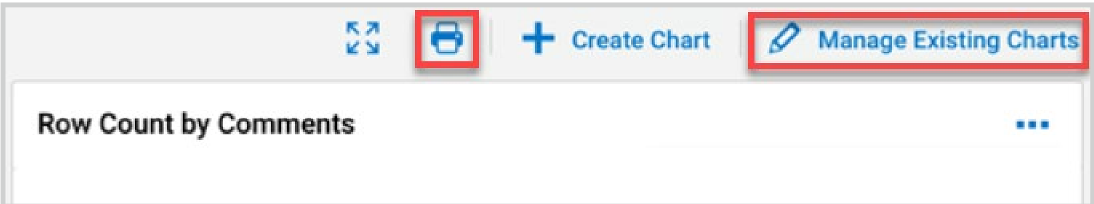
- In the **Visible To Security Profiles** column, clicking the entries will take you to the **Edit Security Profile** maintenance page.

Note: This is not yet supported in the Mobile App.

Charts

Charts Page: Display Actions on the Section not in Ellipsis

WFR-215583: When users access a report page with the Charts View toggle enabled, they now have options just in the section and no longer in the Ellipsis menu so they can use them in one click. There is no ellipsis, and there are separate **Print** (icon) and **Manage Existing Charts** buttons in the section.



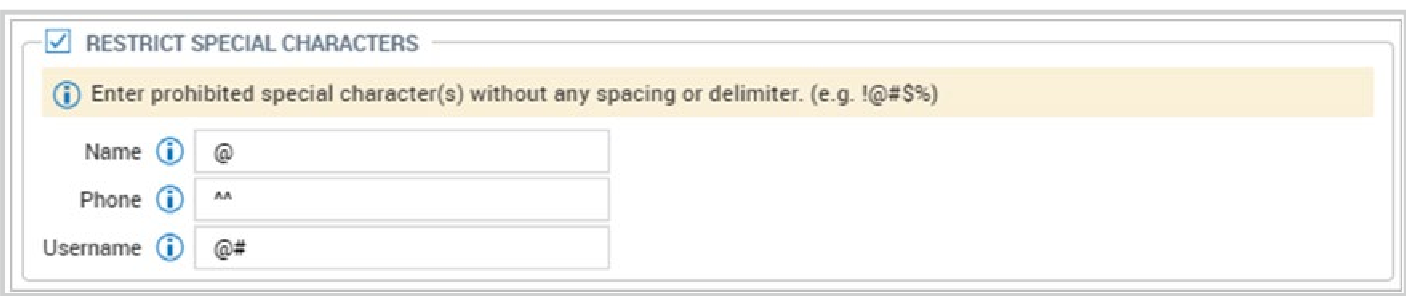
Company Settings

Restrict Special Characters in Certain Fields

WFR-223230: A new widget, **Restrict Special Characters**, has been added to the Company Settings (**Company Settings > Global Setup > Company Setup**, in **Account Policies**). Employers can enable this validation via a checkbox to prohibit special characters for the following fields, listing which special characters are prohibited:

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

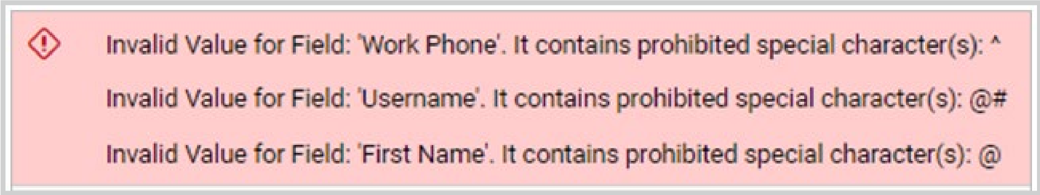
An informational message explains that the special characters should be entered without any spacing or delimiter such as a comma.



Only Special Characters are allowed in all fields under the **Restrict Special Characters** settings section. If a letter or number is entered, an error message displays explaining that it must be a special character. The maximum length of each field in the **Restrict Special Characters** section is 35 characters.

Tip: If a special character is included in the **Generate Username Format**, it should not be entered as a prohibited special character for the Username in the **Restrict Special Characters**. A warning message will display explaining that there are **Conflicting values under Generate Username Format & Username section under RESTRICT SPECIAL CHARACTERS**.

WFR-210494: If **Restrict Special Characters** is enabled in **Account Policies** and prohibited special character(s) is/are entered on the Employee Record (ESS and MSS), an error message displays indicating the special characters are invalid and prohibited.



WFR-215678: Users will receive an error message indicating the special characters are prohibited if they enter special characters via the Employee Import that are listed in the **Restrict Special Characters** section for the field(s).

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

WFR-215679: When users enter special characters via HR Actions, and those special characters are listed in the **Restrict Special Characters** section for the field(s), they will receive an error message when clicking **Save** or **Submit** indicating the special characters are prohibited.

Configuration Documents

Pay Calculations Profiles Rules Structure in Configuration Documents

WFR-209227, WFR-209223, WFR-209219, WFR-220965, WFR-220166, WFR-220155: For companies utilizing Pay Calculations 2.0, users can download an easily understandable Configuration Summary document so that non-technical audiences can digest the document. The following Pay Calculation rules now have a customized structure in the PDF configuration document:

- Round All In/Out Time, Including Breaks and Lunches (v.2)

- Holiday Eligibility (v.2)
- Sum Up Time Off Hours By Day To Default Counter (v.2)
- Sum Up Time/Piecework By Day
- Distribute By Workday Breakdown
- Deduct Lunch (v.4)

Cost Centers

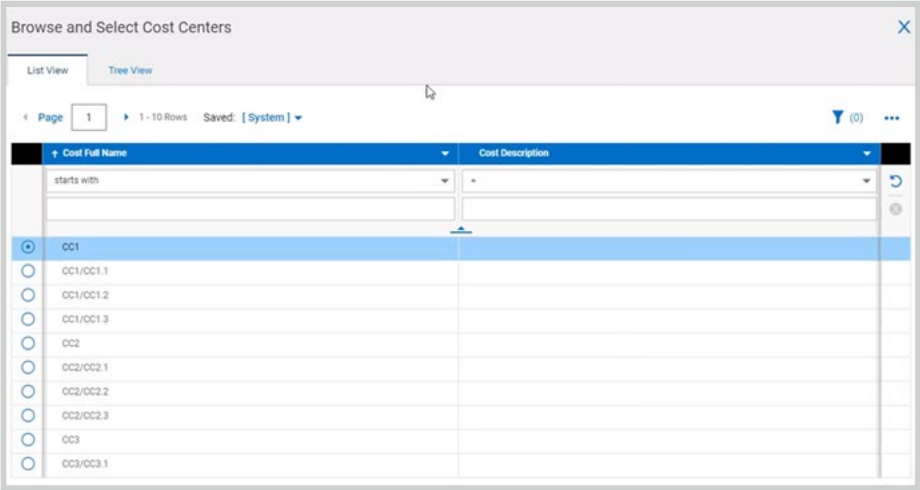
Cost Center Lookup Redesign

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

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

The cost centers are single select, and when you make a selection, the pop-up will close.

Note: Multi-selecting cost centers is available for the **Managed Scheduled Cost Centers**, **Scheduled Cost Centers**, and **Managed Cost Centers** widgets.



If you prefer the Tree View, you can select a cost center from the **Tree View** tab. Select the arrow next to the cost center and any child cost centers associated with the parent will display.

Tip: The **Tree View** tab will not be available if there are more than 750 cost centers in any node.

Dashboards

Dashboard Updates: General

The following updates have been made to dashboards.

Ticket Number	Update/Issue
WFR-220532	Under Company Settings > Profiles/Policies (or **Maintenance > Companies > Client Resources > Global** from an Admin company), menu items for Content Widget Library and Dashboard Layout Profiles are now nested under the Dashboard Layout main menu item in the hamburger menu.

On Entry Show Specified Tab Upon Login on the Dashboard

WFR-197425: Admins need to define and schedule which tab should be viewed when users log in and access the Dashboard. This allows administrators to control the focal point of the end user Dashboard experience at difference stages. The **On Entry Show** option is available to Admins and located within the gear icon on the Dashboard Configuration page.

By default, the **Last Visited** tab is selected. If settings are changed in an active Schedule, changes are applied after the Schedule is **Reset** in either the Dashboard Layout Profile or Security Profile. Settings are applied immediately if a new Schedule Date becomes active or a new Layout Profile is assigned, and when a user logs in to the application or clicks the **Home** button.

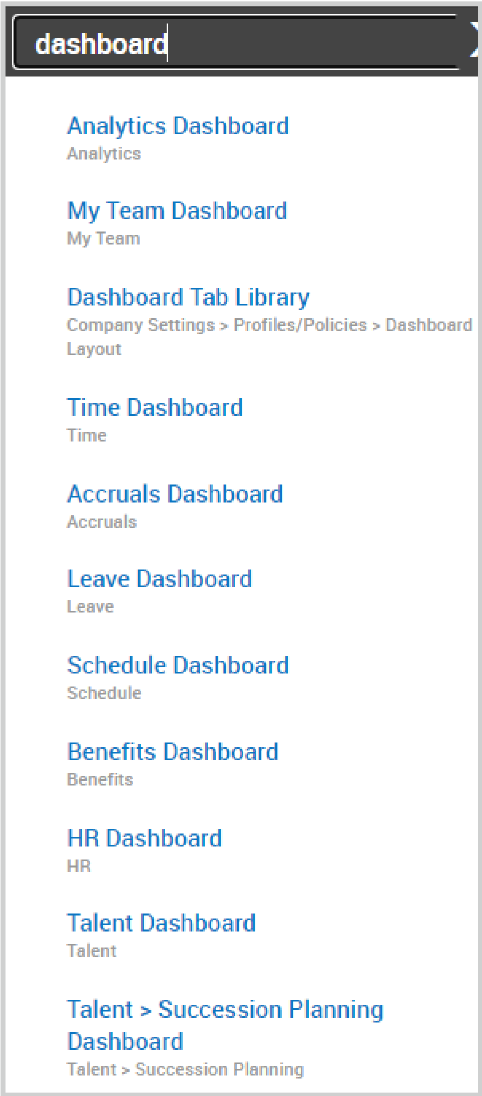
Note: The **On Entry Show** is not available on the Landing page for end users under the gear icon.

Domain Dashboards Renamed

WFR-210550: When searching for "Dashboard" in the main menu, all Domain Dashboards appeared in the search with the same name, which looked confusing. Now the Domain Dashboards have been renamed and appear in the menu as follows:

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

- Analytics Dashboard



Company Default Column in Manage Views Popup

WFR-210383: Users who can manage views on Custom tabs of the Dashboard (**User Can Modify** checkbox is enabled for current schedule) can now see which Dashboard View is selected as the default for themselves and for their company so they don't have to check it manually in every view. By clicking **Manage Views** in the ellipsis menu of the Dashboard tab, the Manage Views pop-up opens. The **Default** column has been renamed **My Default**, and a **Company Default** column has been added next to the **My Default** column. The **Company Default** column shows which View is set as the default for all users in the company. The letter "**Y**" is present in the row for the view which is selected as the default for all.

Security Item Logic for Company Types Dashboard Views

WFR-213514: Users can share saved Dashboard Views with other users without dependency on the reporting framework. In the security profile on the Dashboards tab, any dependency of the **Share With All** radio button in the **Save View As/Save View** pop-up from the **Report Settings** checkbox on the Global tab has been removed. The **Manage Company Type Views** has been added to the **Sharing** section of the Dashboards tab. When enabled, users can:

- Share the Dashboard view with all company employees through the **Share With All** button.
- Edit the Dashboard views of **Company** type.

If the item is disabled:

- The user loses the ability to share the Dashboard view with all company employees through the **Share With All** button.
- Any already shared **Company** type Dashboard views become read-only.

Security Item Logic for Dashboards Shared Views

WFR-211354: Users can share saved Dashboard Views with other users without dependency on the reporting framework. In the security profile on the Dashboards tab, any dependency of the **Share** option in **Save View As/Save View** pop-up from the **Report Sharing User Selection** checkbox on the **Reports** tab.

The **Dashboard Sharing User Selection** security item in the client-level security profile (Dashboards security items) has been renamed **Dashboard Sharing**. The **Dashboard Sharing User Selection** item has been added below the **Dashboard Sharing** option in the **Sharing** section.

By enabling this checkbox, users can share saved views with others.

Migration of Security Items for Dashboard Shared Views

WFR-214444: Users can preserve all previously existing functionality connected with sharing Dashboard views options so they won't be affected after reducing dependencies from report settings security items. Security Items that were created to control sharing Dashboard views options are checked or unchecked in security profiles depending on the state of the related security items that initially controlled the functionality.

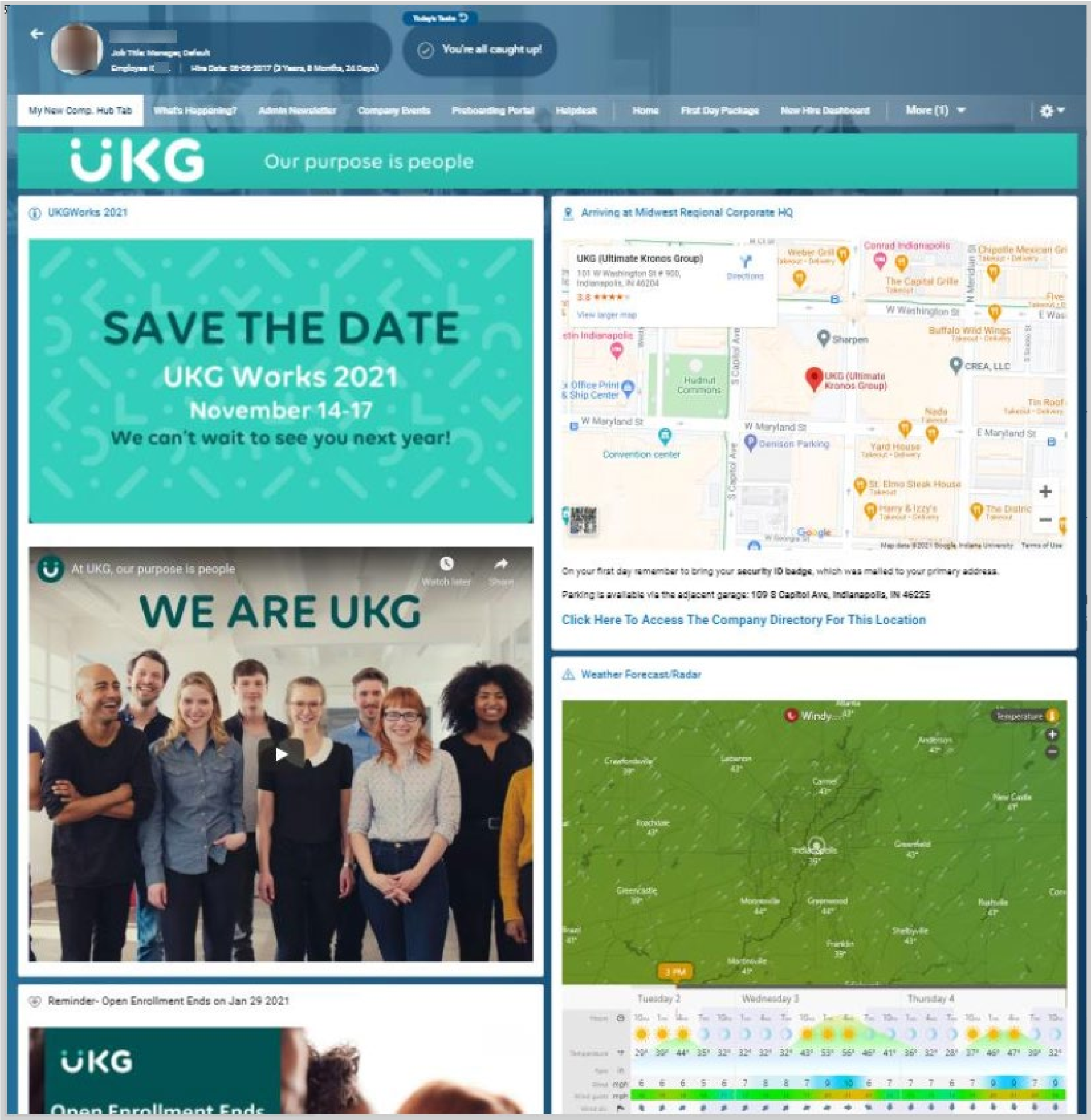
New! Company Hub Dashboard Layout Configuration

****A new Company Hub Tips/Tricks User Guide with additional information on this new functionality is coming soon and should be available within the next 1-2 weeks.****

EPIC WFR-205272 & EPIC WFR-209683

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

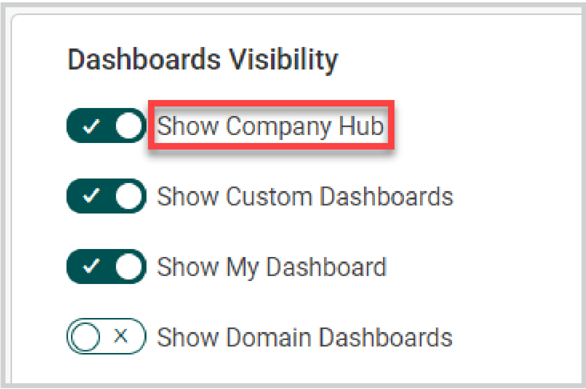
Quick-start templates and formats make it easy to create views that match your organization's needs. This new experience provides specific widgets alongside customized Content widgets, allowing for up to 20 widgets per tab. With the Content widgets, this provides an Intranet within the Dashboard that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

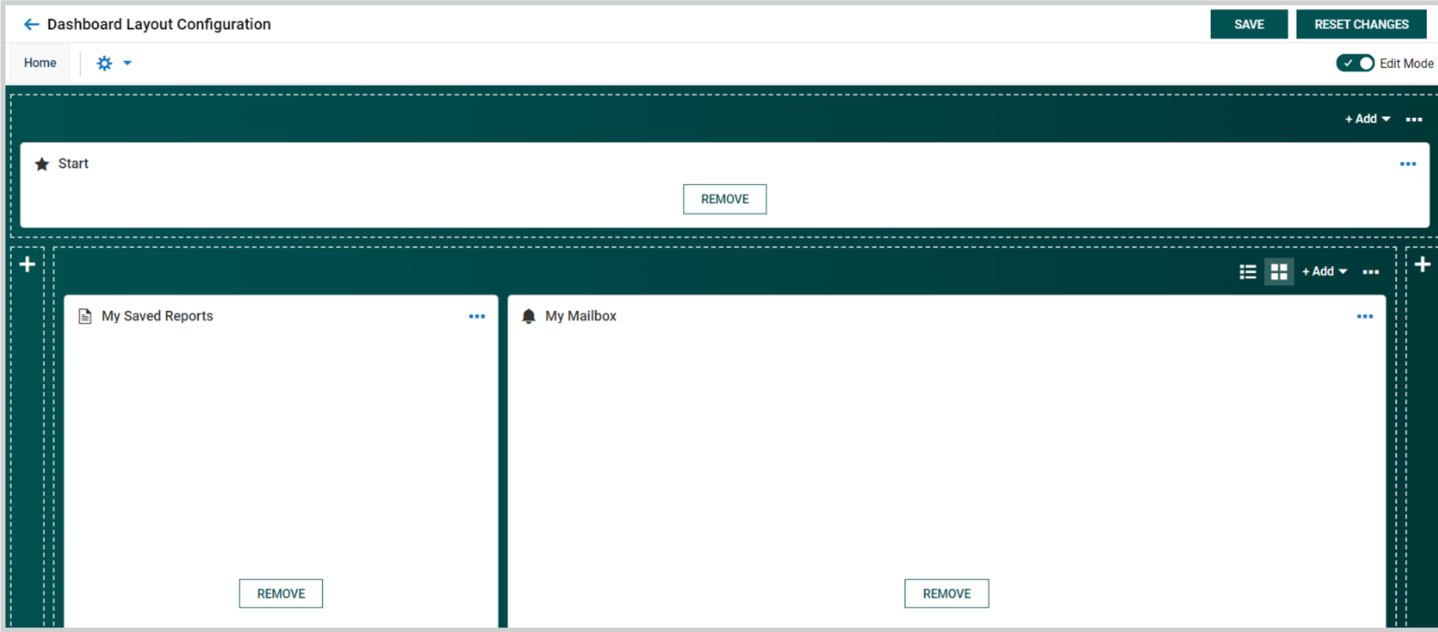


WFR-188771, WFR-206282, WFR-206279, WFR-209638, WFR-211335: The new setting/option, **Show Company Hub**, is now available in the **Dashboards Visibility** section of the Dashboard Layout Profiles. When this option is enabled and a user selects **Edit** for one of the Schedules, grid lines outline different sections to be included in the layout when **Edit Mode** is on. The following sections can be added to the layout:

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

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



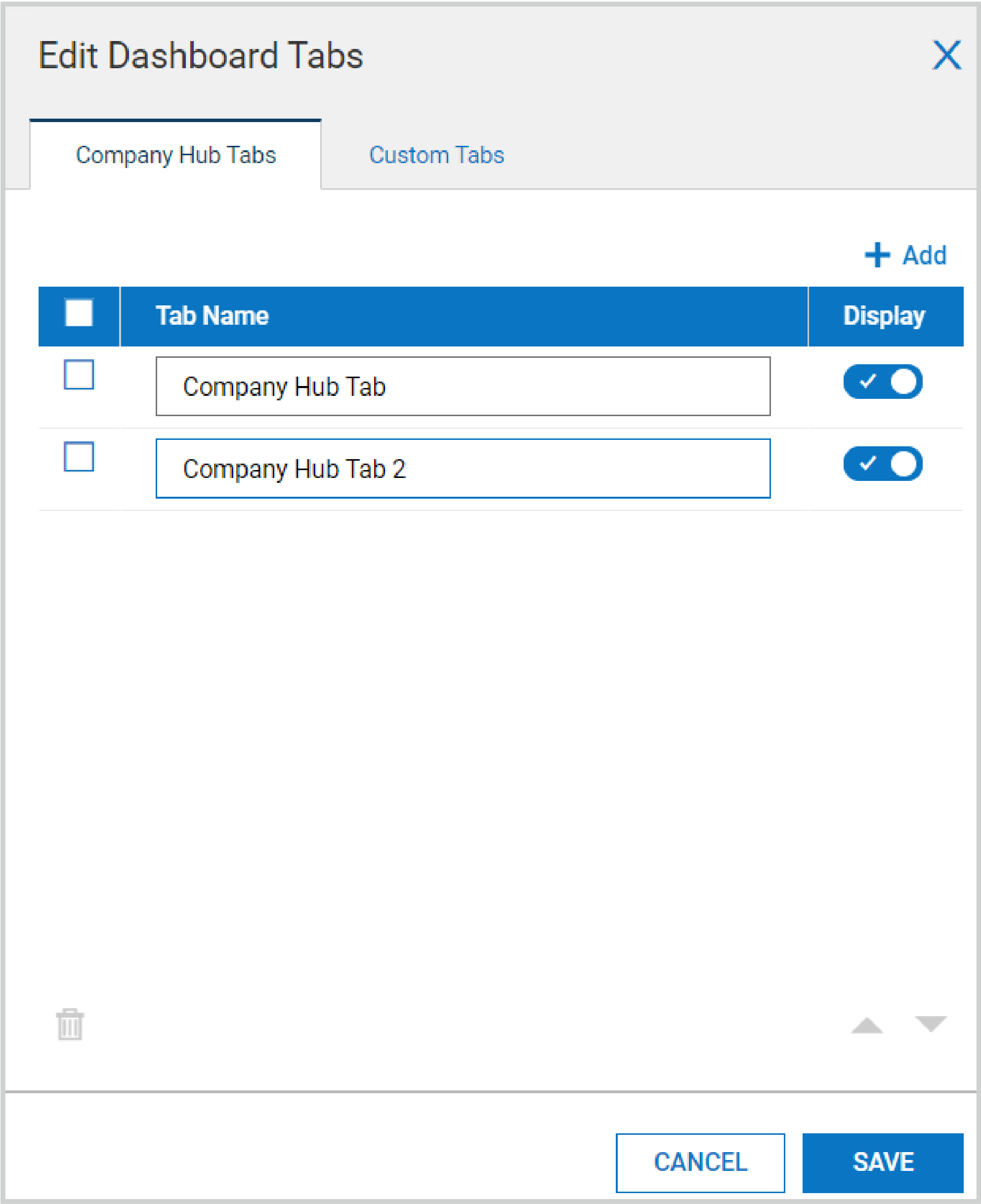


Company Hub Tabs on the Dashboard Configuration Page

WFR-209692: Admins can add Company Hub tabs to the Dashboard Layout Configuration so they can create specific content for end users. By clicking the gear icon in the header of a Dashboard, the **Edit Tabs** option appears in the drop-down and when selected, opens the **Edit Dashboard Tabs** dialog page with options for:

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

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



New Widget Notification With New Grid

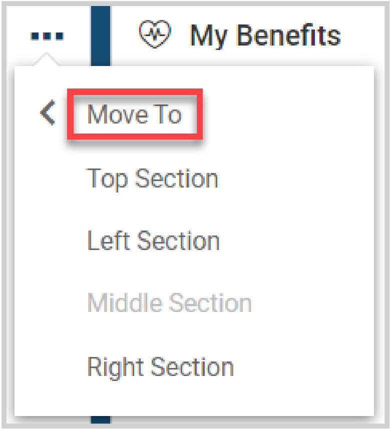
WFR-212356: The new widget notification provides users with dialogue when new widgets are available, and it allows the user to add widgets directly to tabs. When multiple sections are present in the new grid, if a user chooses to add a widget via the new widget notification dialogue, the content is placed in the middle section of the new grid Dashboard Layout.

Move To Functionality for New Grid

WFR-206387: Users can move existing tiles to a different section so they can organize all information in a specific order. When a tile has been added to a section within a Dashboard Layout Profile (**Company**

Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles, select **View/Edit Dashboard Layout Profile**, Edit the appropriate **Schedule**), a tile with an ellipsis menu is presented on the Dashboard. Clicking the ellipsis menu exposes a drop-down list with a **Move To** option with the following options:

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



Copy Tabs From Classic With New Grid

WFR-212355: Within **Edit Tabs**, users can copy tabs from the Classic UI. With the new grid/Company Hub, the following options are available to users when multiple sections are present in the new grid:

- By clicking **Edit Tabs** in the header of Dashboard, an **Edit Dashboard Tabs** pop-up appears on the page. At the top of the pop-up on the Custom Tabs screen, a message explains that **Content is available from your Classic UI. Copy tabs from Classic UI**.
- By clicking the **Copy tabs from Classic UI** link in the message, a **Copy Tabs from Classic UI** pop-up with a list of available tabs and items appears. When a user chooses to copy tabs from Classic, all content is placed in the middle section of the new grid Dashboard Layout.

Add Items to Sections of Company Hub Tabs

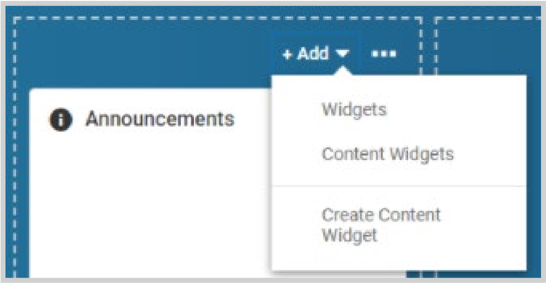
WFR-211327: Users can add different items to every section in the Company Hub tabs (Dashboard Layout Profile under **Company Settings > Profiles/Policies > Dashboard Layout> Dashboard Layout Profiles**, select **View/Edit Dashboard Layout Profile**, Edit the appropriate **Schedule**) so that they can organize information in a proper way.

By clicking **Add** in every section, a drop-down list with the following options is available:

- Widgets
- Content Widgets
- Create Content Widget

Users cannot add or create Reports, Charts, or Pivot Charts. Only non-ESS and non-MSS widgets are available for adding to a tab, such as:

- **Announcements**
- **Documents**
- **Events**
- **Links**
- **Content Widget***(via the separate option in the Add drop-down list)*
- **Start**
- **Turtles**
- **Websites**



Middle Section Configuration in New Grid

WFR-207970: Users can place more tiles in the middle section of the new grid so the main Widgets/Charts are in one space. When the Dashboard grid (Dashboard Layout Profile under **Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles**, select **View/Edit Dashboard Layout Profile**, Edit the appropriate **Schedule**) is presented and the Edit mode is enabled, the Middle section is displayed by default

WFR-218776: Users can view up to three columns in the middle section so that previous versions of the Dashboard Layout are not affected after changes are applied with the new grid. Every column is added dynamically depending on the section width, and the columns appear adaptively depending on the width of the Middle section. The Resize tiles functionality is supported for 1 to 3 columns.

WFR-217622: Users can change the view of the tiles in middle section so they can restructure the tiles. When the Dashboard grid with a middle section is presented on the page with the **Edit Mode** enabled, options for List View and Matrix View are available at the top of the middle section.

- By selecting the List View option, all tiles are placed one under another as a list.
- By selecting the Matrix View option, all tiles are placed next to each other as a matrix.

New Grid Type for End Users

WFR-205226: Users can now conduct changes on their Dashboards so that they can organize it in a more convenient way. When navigating via the Home button in the main hamburger menu, users see the Dashboard, where these changes have been made:

- The **Edit Tabs** text next to the Gear icon in the header of the Dashboard and on the Configuration page has been removed.
- An **Edit Mode** toggle is available to control the Edit Mode on the page.
- The Ellipsis Menu and Fullscreen buttons have been removed completely from both the Admin and end-user Dashboard.
- By clicking on the Gear icon, a drop-down list with the following options appears on the Configuration page:
- **Edit Tabs**
- **On Entry Show**
- By clicking the Gear icon, a drop-down list with the following options appears for Custom Dashboards on the Landing page:
- **Edit Tabs**
- **Enable Edit Mode/Disable Edit Mode**
- **Reset Configuration**
- **Refresh**
- **Print**

- By clicking the Gear icon, a drop-down list with the following options appears for Domain Dashboards on the Landing page (and for Domain Dashboards from the main menu):
- **Edit Tabs**
- **Enable Edit Mode/Disable Edit Mode**
- **Refresh**
- **Print**
- **Save View...**
- **Save View As...**
- **Manage Views...**

By switching on the **Edit Mode** toggle, a grid with the following sections appears:

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

Full Screen Mode for Report/Chart Tiles in Sections of the Company Hub/New Grid

WFR-224173: If the Company Hub/new grid is being used, Report and Chart tiles in full screen mode are handled as follows:

- A Report/Chart tile with the Full Screen option is presented in every section of a Dashboard tab.
- By clicking the Full Screen button for the tile, the Report/Chart is expanded on the page.
- The Report/Chart tile covers other sections of the Dashboard.
- To exit the Full Screen mode, users can press the ESC button or click on the Full Screen control for the tile.

Gear Icon Options on Dashboard in Company Hub

WFR-220426: The gear icon dynamically shows options based on the tab the user is on (i.e., if a user is on a Domain tab, s/he will see Save View, Save View As, Manage Views). Under the gear icon, the following apply:

- When a user is on a Company Hub tab, s/he does not see the options to **Print** or **Reset Configuration** as they are not supported options.
- When user is on a Custom tab and does not have permission to modify (**User Can Modify** is disabled), the **Reset Configuration** option is not available.

Edit Mode Toggle Disabled Without Permission to Modify Dashboard

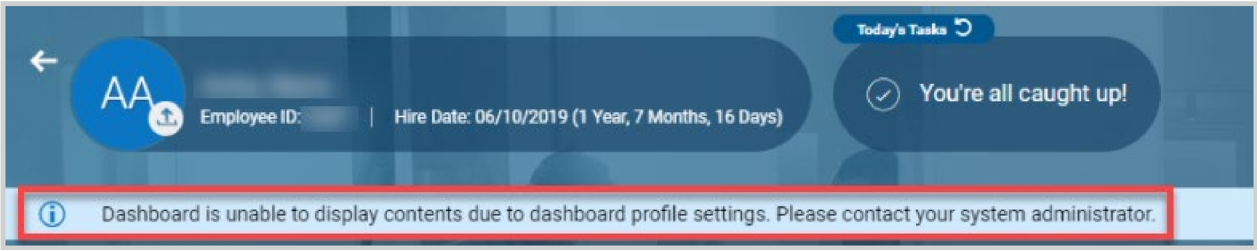
WFR-220191: When a user does not have permission to modify their dashboard, s/he also does not have access to the Edit Mode toggle. The following items are not available to the user:

- The Edit Mode toggle
- The Enable Edit Mode item in the Gear menu
- The Ellipsis menu for Widgets

All edit options are absent on the Company Hub tabs. Edit options are available for users on the Domain tabs in accordance with the Saved View permissions.

Company Hub Tabs Available Independently from Other Tabs

WFR-221132: If **Show Custom Dashboards**, **Show Domain Dashboards** and **Show My Dashboard** toggles are off, but the Company Hub tabs are on, users see an informational message about the Dashboard unable to display contents.



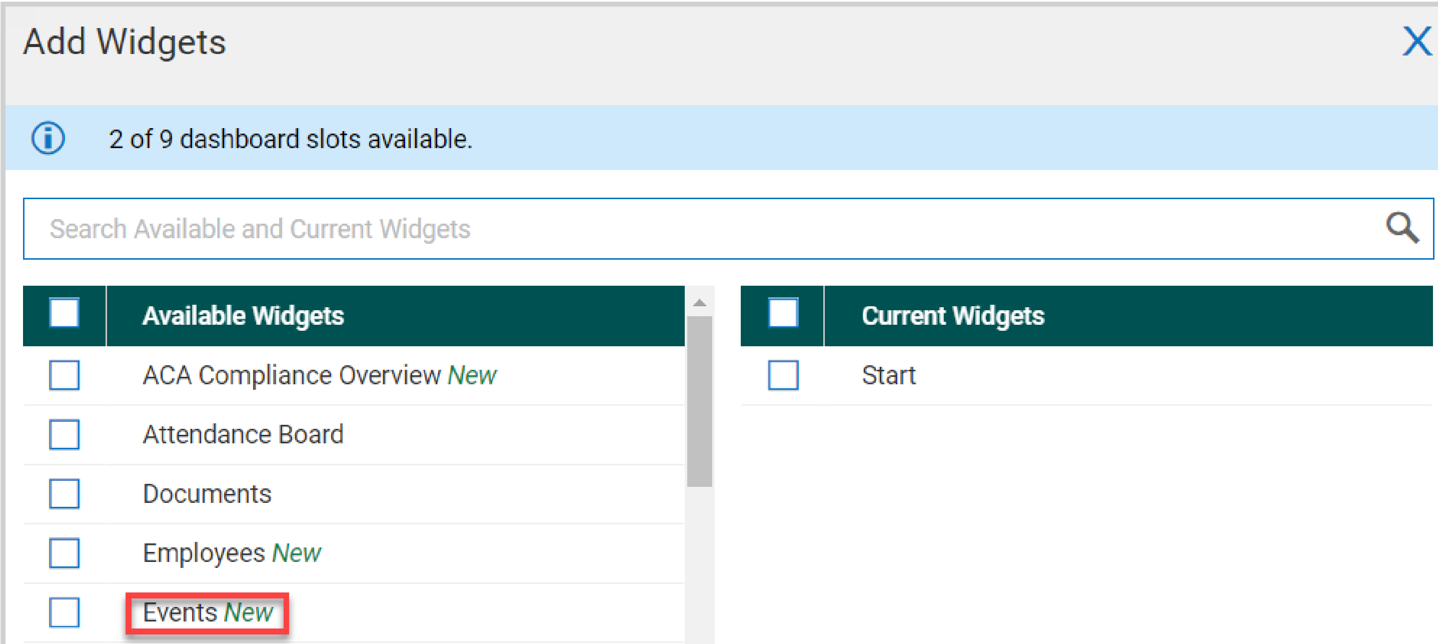
Admin Remains on Same Dashboard Tab After Reset Layout

WFR-216436: When a Company Admin makes changes to a specific tab on the Dashboard Layout Profile and clicks Reset Changes, s/he remains on the same tab after the layout is reset. If an Admin clicks Reset Layout without saving a recently created tab, s/he is redirected to the first Custom tab. If no Custom tabs exist, the user is redirected to the first Company Hub tab.

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

WFR-226788: Where the Add Widgets pop-up is presented on the page, the Events widget is now included in the list of Available Widgets, and can be selected to add to the Company Hub tab.

PAYPRO Workforce Management



Dashboard Widgets

Note: The additional Dashboard widgets may not be available immediately following the release. These new widgets will be steadily rolled out to companies after the initial release date for each POD. The widgets will be made available via a gradual rollout across the 3-4 weeks following the April 2021 release.

Leave of Absence Cases Widget

WFR-218240: In companies with TLM Enterprise or HR Enterprise enabled, users are able to view the Leave of Absence Cases widget in the New UI Dashboard. This report-based widget uses the same columns as the **Leave > Cases** report.

Leave of Absence Cases Widget: New Case

WFR-219398: Users can now create new cases from the Leave of Absence Cases widget. Users can click/press the **New Case** button to launch a dialog for creating a new leave case from the widget.

Events Widget

WFR-147484: Users with the appropriate security permissions to Events can now view the Events report in the New UI Dashboard as a widget. Saved report views from the Events report are not available in the widget, and saved views from the widget are not available in the Events report.

Employees Widget

WFR-218230: Users can now take action on available Employees from the Employees widget in the Dashboard. A **Checkbox: Select Row** has been added as a first column in the widget. User can select one or more Employees, in addition to selecting all rows shown at one time, to take the following actions:

- **Hire:** Redirects to the **New Employee** page given that the security profile permission **Employee Information (My Team)** is set to **Add** under the HR Tab.
- **Terminate:** Redirects to the **Terminate Employee** page given that the **Terminate Employee** checkbox under the HR tab in the security profile is checked.
- **Re-Hire:** Launches a dialog **Rehire Employees** given that the **Rehire Employee** checkbox under the HR tab in the security profile is checked.
- **Communicate:** Launches a dialog **Communicate** given that the **Broadcast Messaging** is enabled under **Admin > Company Settings > Global Setup > Company Setup** in the Company Configuration widget.
- **View:** Redirects to the **Edit Employee** page given that the **Employee Information (My Team)** is set to **View** or **View/Edit** in the Security Profile.
- **Early/Late Punch Override:** Modal pop-up **Allow early/late punch?** appears given that the **Early/Late Punch Override** checkbox under the **Modules** tab in the Security Profile is checked.
- **Send Account Created Email:** Modal pop-up **Send account created email?** Appears. The notification **Account Created** is configured under **Company Settings > Global Setup > Notifications**.
- **Download PDF:** Launches a dialog **Print Settings** given that the **Employee Information (My Team)** is set to View or View/Edit in security profile.

WFR-152891: Users can now view the Employee Information (also known as Employee List) report in the New UI Dashboard as a widget (Employees widget). Users must have the security profile permission of Employee Information (My Team) set to at least View under the HR Tab. If the user had one or more views from the Classic Employees widget, these views are available in the New UI widget. The default view from those views is shown when the user views the widget.

The system default view of the widget provides the following columns:

- Actions
- Button: View/Edit Employee
- Button: Employee Quick Links

- Employee: Picture
- Employee: Employee ID
- Employee: Badge
- Employee: First Name
- Employee: Last Name
- Employee: EIN
- Employee: Status

ACA Compliance Overview Widget

WFR-218241: Users can view the ACA Compliance Overview widget in the New UI Dashboard. This report-based widget uses the same columns as the ACA Data Summary report. Users must have a security profile permission of the **ACA (Affordable Care Act) Timeline** is set to at least View under the HR Tab. If the user had one or more views from the classic ACA Compliance Overview widget, these views are available in the New UI widget. The default view from those views is shown when the user views the widget.

Note: The **# Items to Show** option has been removed from the Classic Dashboard widget, which allows the Classic and New UI to support the ability to use date range-based filtering.

Time Summary Widget

WFR-192602: If the Time Summary widget is included in the New UI Dashboard Layout, and Timesheets View/Edit permission is granted to the user via their assigned Security Profile under the TLM tab section, the user can view the Time Summary report-based widget. If permission is not granted, the Time Summary report-based widget is not displayed and the **No Data to Display** message is shown.

The Time Summary title is linked to the **Team > Time > Timesheets > Time Summary** report screen in companies with the TLM SBE sub-system only. There is no clickable title in companies with the TLM Enterprise sub-system enabled. Additionally, the total hours icon is used in the title.

Users are still able to share views, like within a normal report. When the column width of the report is at 2-3 column width, the report is shown in the Desktop view with the inline panel collapsed by default. If a user saves a view with the inline panel expanded, the widget maintains the expanded view until the user decides to collapse it and save this to the view.

The system default view of the widget provides all columns, in the following order left to right:

- Period Label

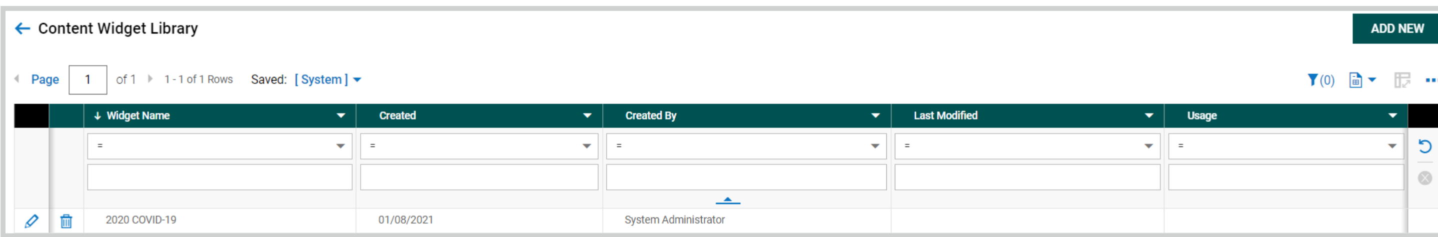
- Incomplete Time Entries
- Unprocessed Punches
- Punches
- # of Employees
- All Pay Categories or Counters Columns

The display order of these columns in the System Default view is the same as the Time Summary report.

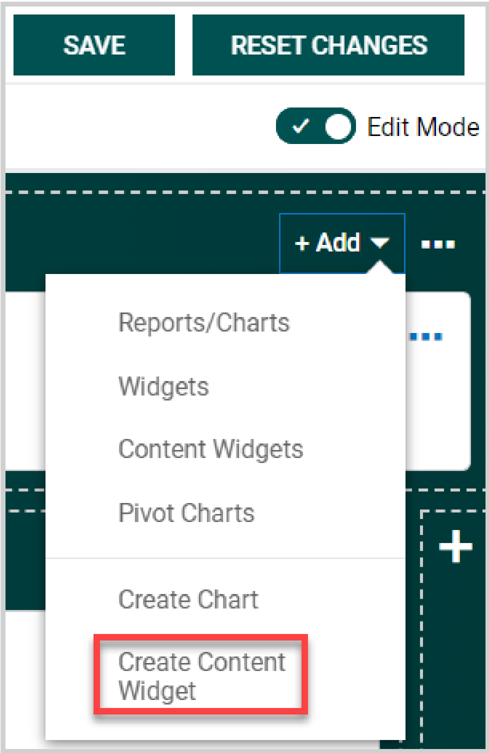
Content Widget: New!

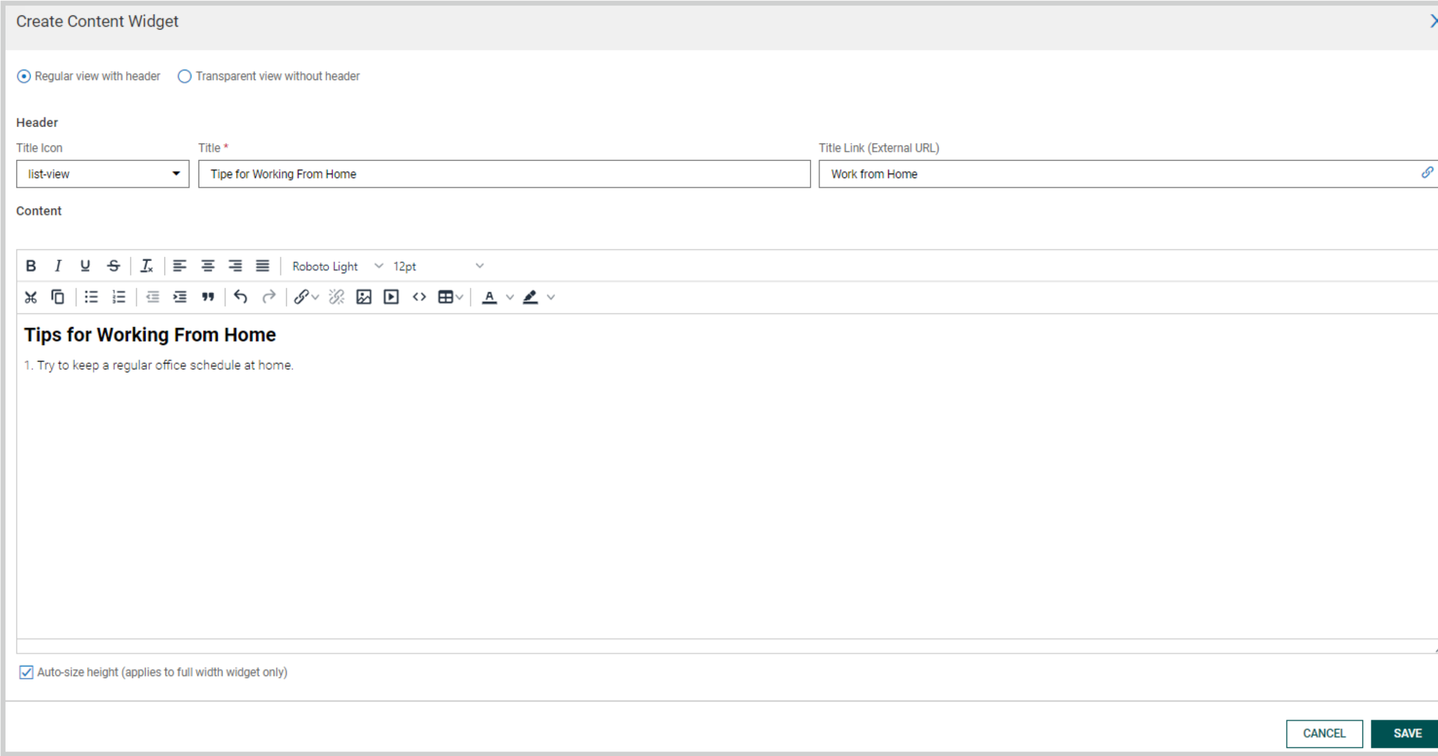
WFR-183527, WFR-187061, WFR-192224: A new **Content Widget** is now available so you can add customizable content pertaining to your specific company needs. Multiple widgets can be created and added to the tabs of your dashboards.

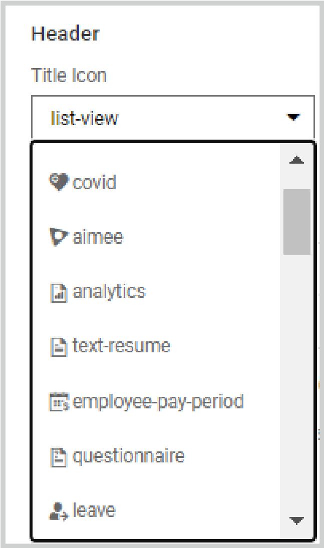
This content can be created and added by clicking the **Content Widget Library** button under **Company Settings > Profiles/Policies > Dashboard Layout > Content Widget Library**. Click **Add New** to create a new Content widget.



Administrators can use the **+Add** drop-down and select **Create Content Widget** option.


SAVE
RESET CHANGES
Edit Mode
+ Add
Reports/Charts
Widgets
Content Widgets
Pivot Charts
Create Chart
Create Content Widget


Create Content Widget
Regular view with header
Transparent view without header
Header
Title Icon
list-view
Title *
Tipe for Working From Home
Title Link (External URL)
Work from Home
Content
Roboto Light
12pt
Tips for Working From Home
1. Try to keep a regular office schedule at home.
Auto-size height (applies to full width widget only)
CANCEL
SAVE



- Add the title that will appear to your users. Create the content and use the text editor to customize. Once saved, the widget will be added to your current tab. You can also select to make the widget transparent and without a header. This option is disabled by default.
- Title Icons are available from the drop-down list. Each item will show the icon that will display next to the title.
- If linking the information to a website, you can list the URL title in the **Title Link (External URL)** field.

Content Widget Improvements

Content Widget: Auto-Size

WFR-189642, WFR-196208: The **Auto-Size Height** checkbox has been added to the Create/Edit Content widget pop-up, allowing users to define how they handle widget height. The checkbox is enabled by default, so auto-sizing is enabled by default for new (**Create Content Widget**) and already existing Content widgets. The **Auto-Size Height** behavior works with both the Regular View with Header and the Transparent View without Header settings in the Content widget configuration.

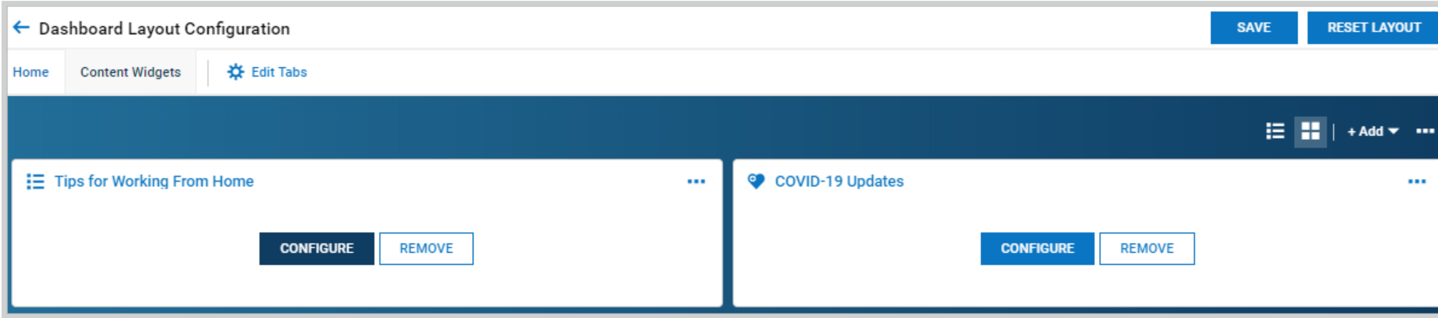
Tip: Auto size for the Content widget works when the tile is the full width of the Dashboard. It will not work, for example, when the Content widget is 1 or 2 columns width because other tiles are in the row and impact its usage.

WFR-193663: When the **Auto-Size Height** checkbox is enabled, the full-width Content widget height in the Dashboard is auto-sized according to content. Auto-sizing works for both transparent and regular Content widget versions. For example:

- If only one or two lines of text are shown, the Content widget height automatically shrinks to show those lines.
- If a large amount of content (more than the Content widget can fit without scrolling) is added to the widget, the Content widget height automatically expands to show all of the content without a scrollbar.

The Adjust Size option is disabled (grayed out) when the Content widget is at full width and **Auto-Size Height** is enabled. Full-width width can be 1 or 2 columns width depending on the device/screen resolution. If the Content widget width is adjusted to not be full width, then the Auto-Size option is grayed out and is not applicable, and the last selected state still appears.

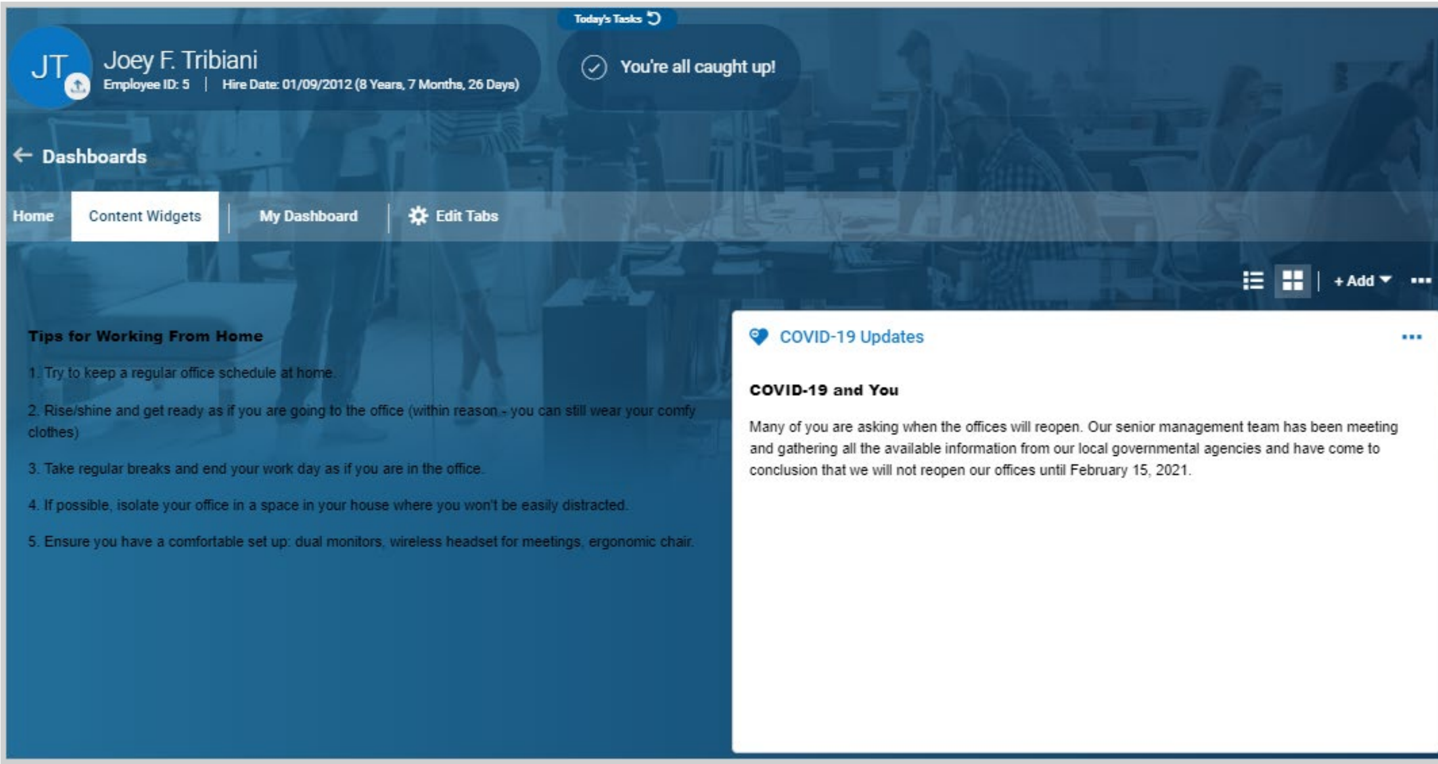
When editing the dashboard schedule, and clicking the **Content Widget** tab, you can remove or edit the widgets using the **Configure** and **Remove** buttons.



End User View

Adding entries will automatically create a **Content Widgets** tab in your dashboard profiles. When users click the tab, they will see the entries you created. In the example below, the entry on the left is transparent and the entry on the right is not.

If users have permission to edit their widgets, the **Add+** option will be available, and users can add more widgets. They cannot create or add Content Widgets.



Content Widget: Copy Company

WFR-195180, WFR-184849: When using the Copy Company functionality, the Content widget is included in the new company copied from the existing company. The Content widget is also included when using the Snapshots functionality.

Delete Previously Created Content Widgets

WFR-200711: Users who have access to the Content Widgets Library under **Company Settings > Profiles/Policies > Dashboard Layout > Content Widget Library** can now delete Content widgets when given the appropriate security permissions (View/Edit/Delete for the **Dashboard Layout Profile** security item). A new column, **Button: Delete**, has been added to the report by default. Users can delete a Content widget even when it is assigned to a Dashboard Layout Profile.

When the user clicks the **Delete** button, the following warning message appears:

"**This action cannot be undone. Are you sure you want to delete Content widget settings**?"

Users can choose to **Cancel** or **Delete**.

Content Widget Save Behavior

WFR-209332: The **Save** action for Content widgets now only saves the changes to the Content widget, and changes are pushed to end users when a Dashboard Layout Schedule is Reset or scheduled for a Start Date.

- Upon the Reset/Start Date of a schedule inside a Dashboard Layout profile, the Content widget changes are available to the end-users assigned to the Dashboard Layout profile.

- If other Dashboard Layout profiles contain the same Content widget, the changes are not available to the end users until the Schedules in those profiles are Reset or begin on a Start Date.

Preview Content Widget Output on Dashboard Layout Schedule

WFR-197230: Admins now have the option to preview the Content widget output on the Dashboard Layout Schedule. The **Edit Mode** toggle is enabled by default anytime a user accesses the Dashboard Layout Profile configuration page. When the **Edit Mode** toggle is enabled:

- The **Configure** and **Remove** buttons on the Content widget(s) are available.
- The Widgets and Report/Chart tiles continue to be displayed as usual without the **Edit Mode** toggle.

When the **Edit Mode** is switched off:

- The Configure and Remove buttons are hidden on the Content widget(s). The Content widget output on the Dashboard Layout Schedule page is based on the tile configuration.
- The Widgets and Report/Chart tiles continue to be displayed as usual without the **Edit Mode** toggle.

Note: This behavior is not applicable to the end user Dashboard Layout Edit Mode.

Delivery Destinations

SFTP Failure Email Delivery Destinations in Data Exports and Deliver To

WFR-217911: Email Delivery Destinations that are linked to SFTP Delivery Destinations Failure Email Destinations have been removed from Data Exports and the Report "Deliver To..." list of destinations.

SFTP Connection Enhancements

WFR-205123: The following enhancements have been made to the SFTP connections for SFTP Delivery Destinations.

- When testing a connection, there is now a 3 second wait before closing the connection if it is successful.
- Additional messages have been added based upon the type of failure returned by the server.
- The port number is automatically removed from the hostname when saving or connecting.

- An error is shown when the port number is not in the valid range (1 to 65535).

Employee Profile

Daily Rules Limit List

WFR-197695, WFR-221386: Previously, users could create lists for daily schedules, but they were unable to assign a list to a manager so that the manager was able to see only the Daily Rules in their list when creating basic schedules.

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

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

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

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

New! Employee Profile Redesign

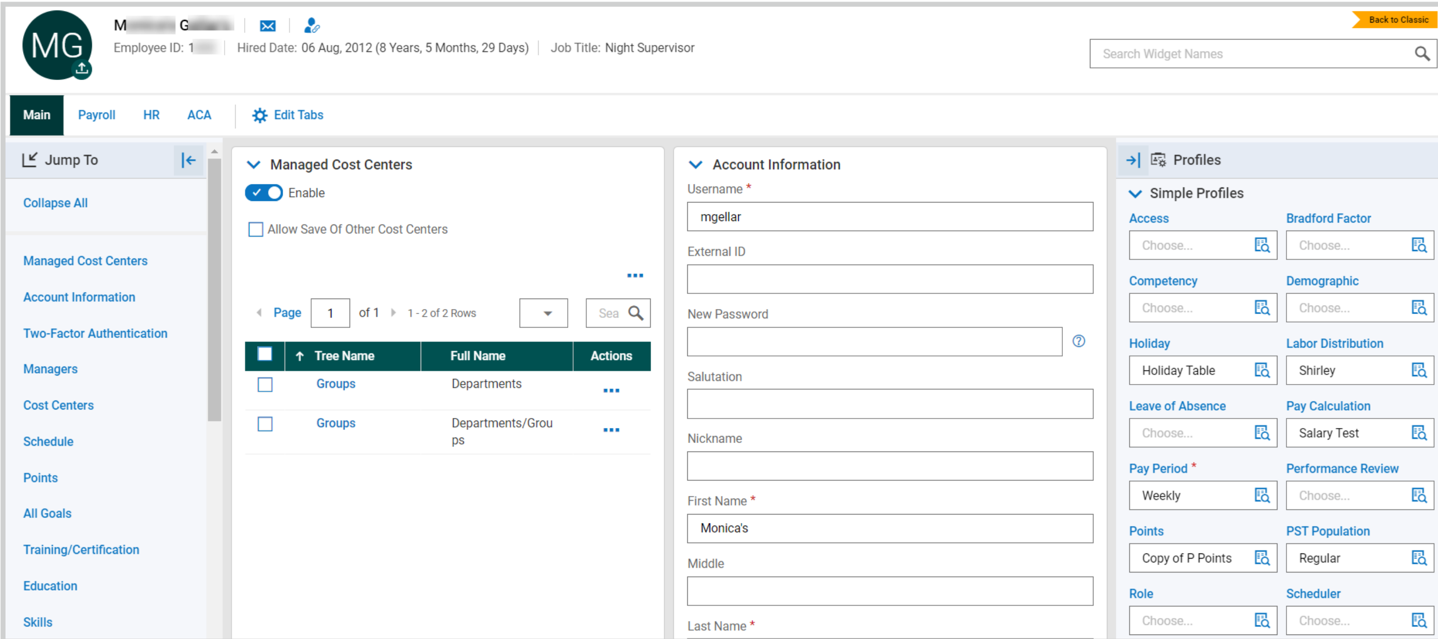
EPIC WFR-195571

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

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

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

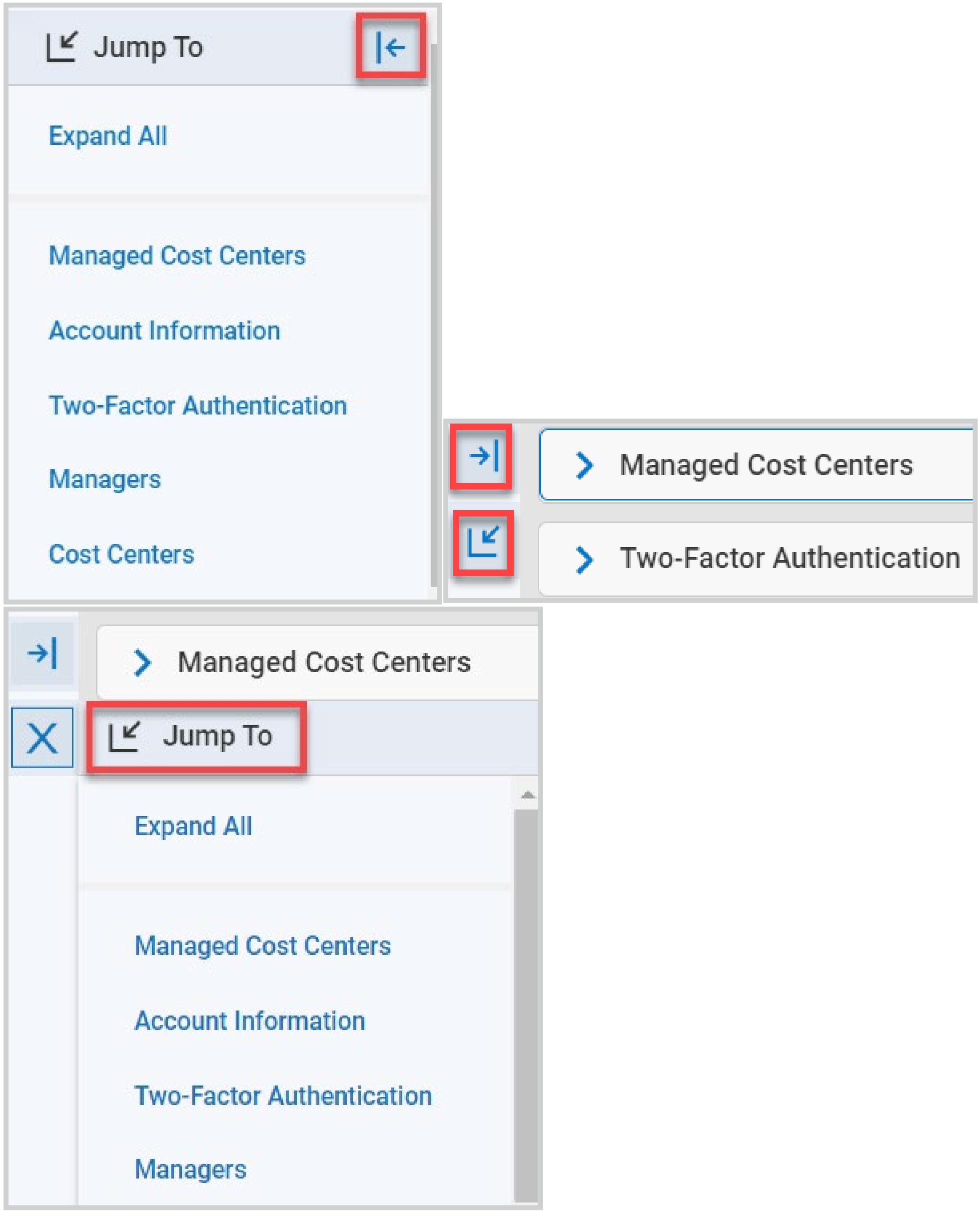
A **Jump To** Links panel now displays along the left hand side. A section with general widgets is positioned in the middle of the page, and Profiles now display on the right hand side.



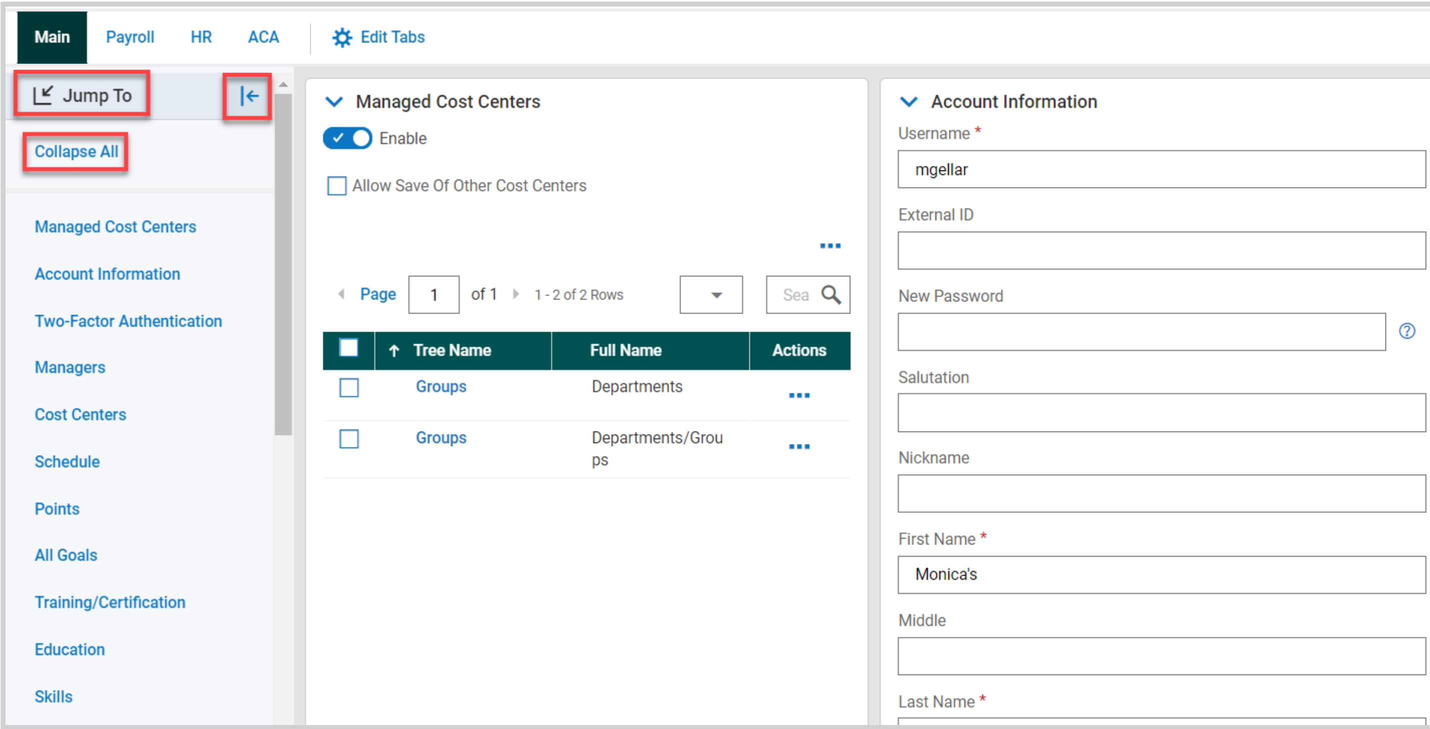
Jump To Links (left panel)

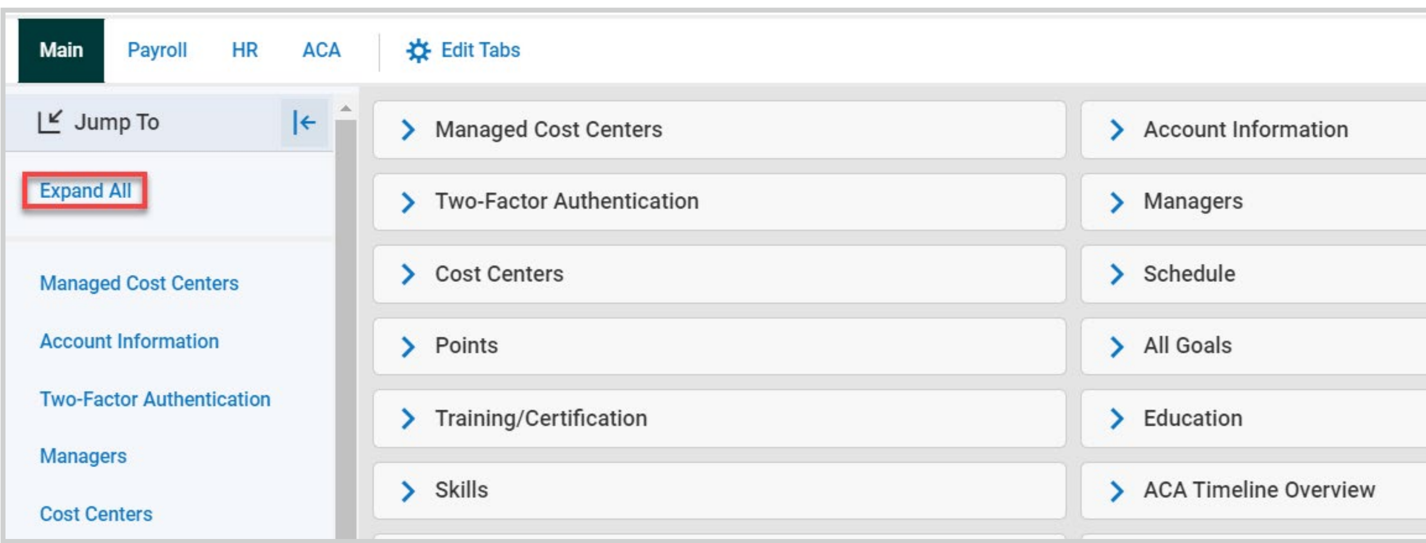
This panel includes links that allow users to "jump to" specific sections/widgets within the center of the page.

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



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





Widgets (middle section)

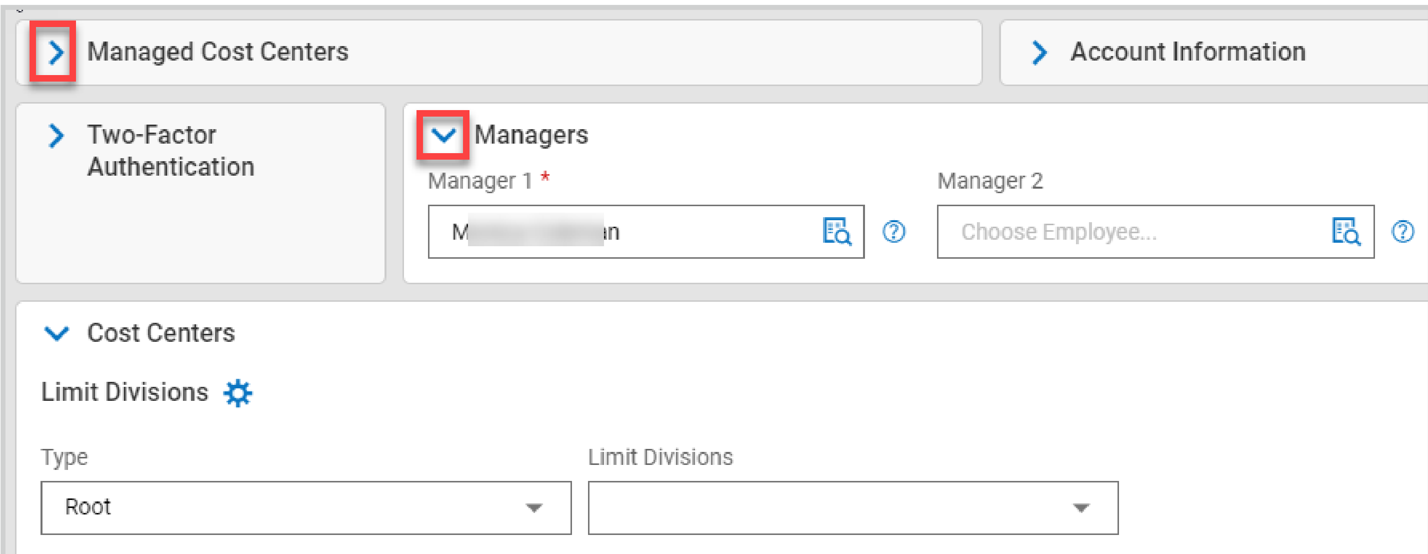
This section contains the applicable employee widgets, and no functional changes have been made to the widgets.

- This also applies to **My Profile** and **Applicant Profiles**.
- The layout of this section can be 1, 2 or 3 columns based on:
- 1 column with the left and right panels collapsed (768-1280 px)

- 1 column with the left and right panels opened (1280-1680 px)
- 2 columns (1680-2560 px)
- 3 columns (2560 px and above)

As the screen grows and additional columns are added, the widgets are displayed based on the order defined in **Edit Tabs**. For example, if a user has Widget A, Widget B and Widget C listed as 1, 2, and 3 in the **Edit Tabs**, and they have 3 columns, then Widgets A, B, and C are all in the first row.

- Widgets can be expanded and collapsed, and the selection made by the user is saved across sessions.

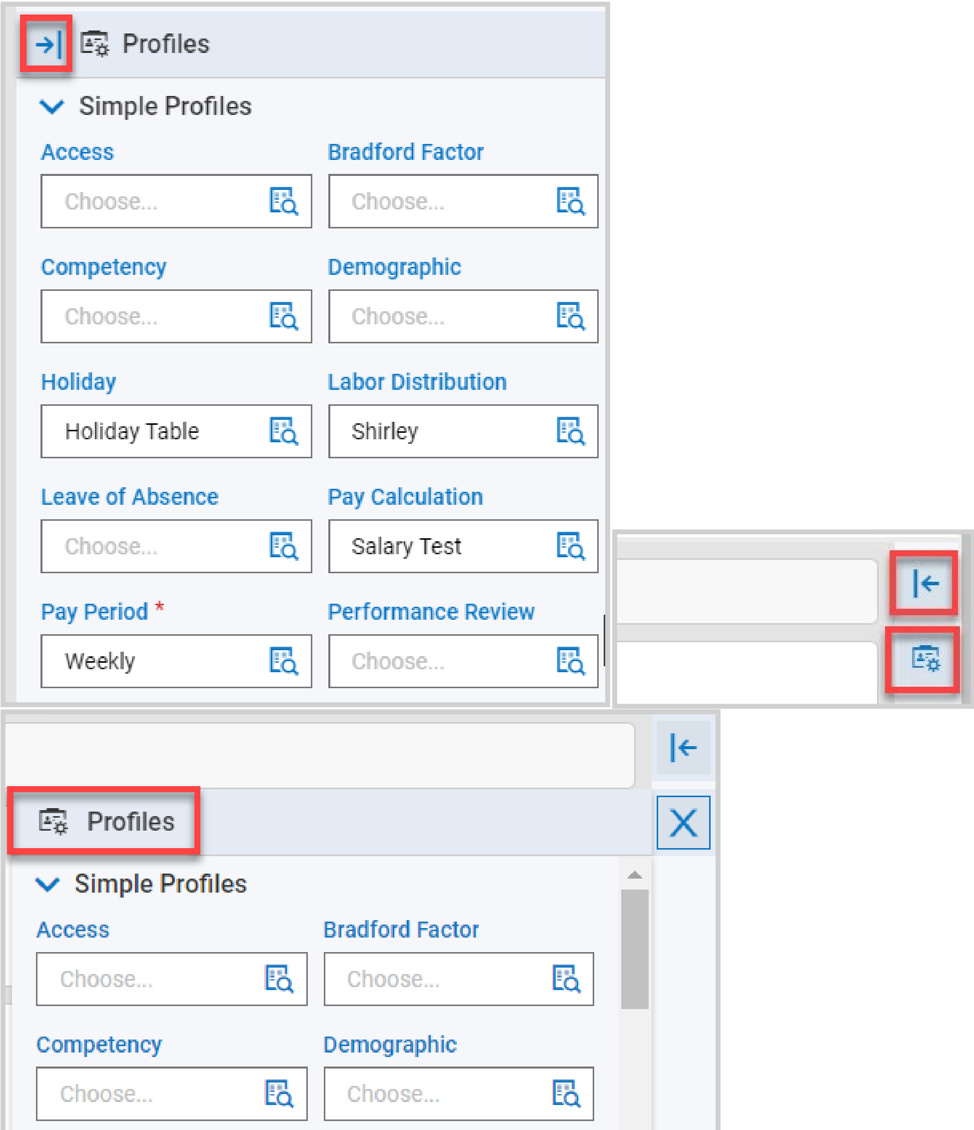


- The width of a widget is determined by the number of columns and how many widgets are expanded on a given column.

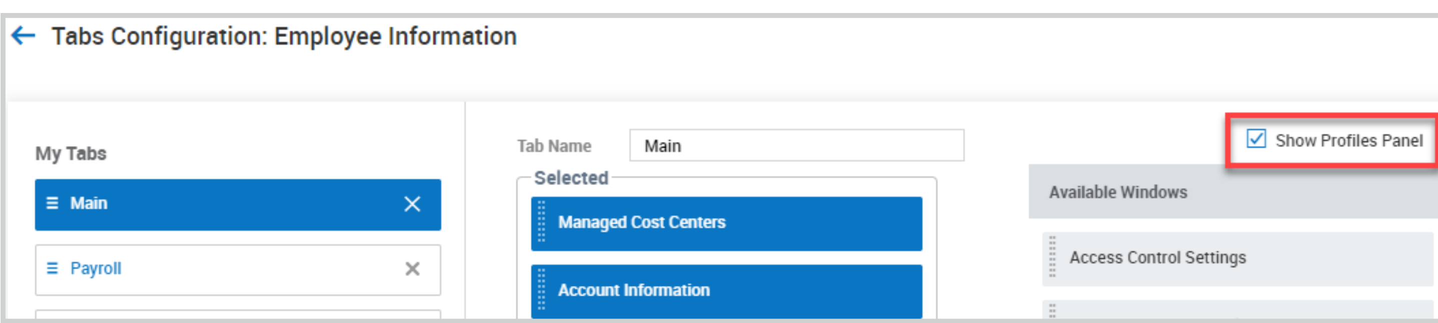
Profiles Widget (right panel)

This panel includes the Profiles available to be assigned to employees.

- This is a new section/panel. The **Profiles** widget has been moved to the right panel.
- This section can be expanded and collapsed. When collapsed, users can expand the section via the Profile icon.



- The **Profiles** widget is enabled on a tab via the **Show Profiles Panel** checkbox on the configuration (**Edit Tabs**) page.

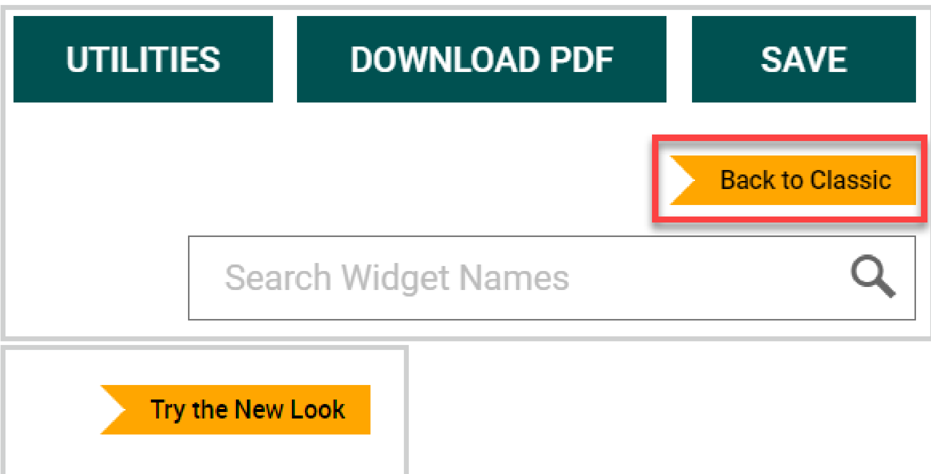


- Profiles are accessed via the Profile icon in the header in the Mobile Application only.

Employee Profile Toggle between the Classic Look and the New Design

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

WFR-218798: Users can utilize a toggle to return back to the Classic view of the Employee Profile or to try out the new look. When the Employee Profile screen is in the Classic mode, the toggle allows users to **Try the New Look**. When the Employee Profile screen is in the redesigned view, the toggle allows users to go **Back to Classic**.



Note: The **Try the New Look** toggle will be removed during a future release.

Cost Center Widget: Hide Fields

****This functionality is only available in the multi-column (compact) Employee Profile view.****

WFR-214641: Admins/users with Edit access to the Employee Profile and Cost Center Widget (Custom Permissions are applicable) and the ability to edit their tab configuration (Edit Tabs) can customize their widget to meet their own needs. The Gear icon has been added to the Cost Center widget in Edit Tabs, and when selected, a dialog appears listing all of the fields within the Cost Center widget with checkboxes next to them.

- All checkboxes are selected by default.
- If the checkbox is unselected, that field is no longer shown within the Cost Center widget of this user's profile.
- For cost centers, the full cost center section will be considered 1 field/checkbox in the configuration. The following apply:

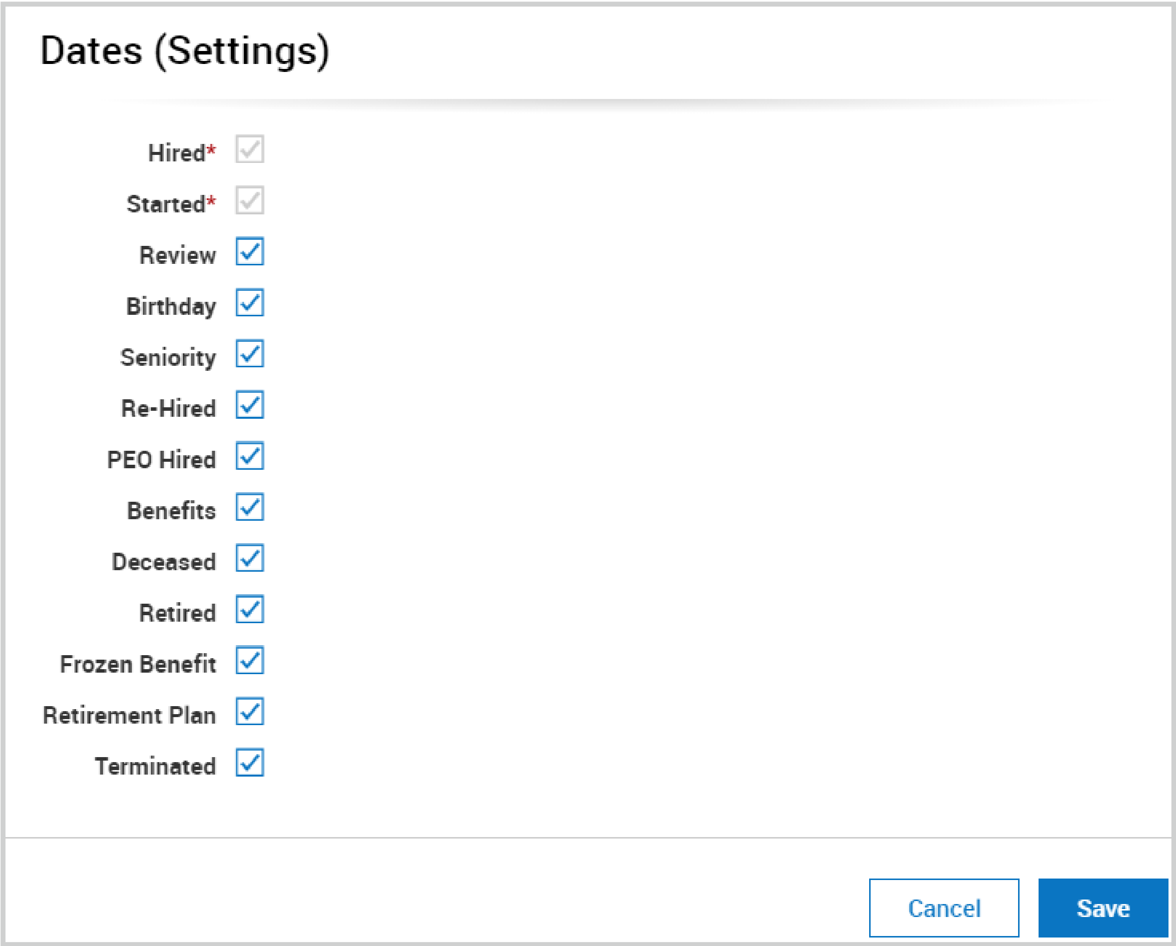
- If a Cost Center (or field) is required, then it cannot be hidden. It appears in the configuration dialog with the checkbox selected (read-only) and a red asterisk next to the name.
- If a user does not have security access to a particular cost center, that cost center option does not appear in the show/hide pop-up.
- If a user has elected to hide all fields, the entire widget no longer appears in the associated tab.

Dates Widget: Hide Fields

****This functionality is only available in the multi-column (compact) Employee Profile view.****

WFR-214644: Managers with Edit Access to the Employee Profile and Dates Widget can now customize the Dates widget based on their own needs. Users can quickly locate their employee's Start Date, Birthday, etc. so they know when to complete their Annual Review and send them a company Birthday Card. Other dates associated with their accounts can be hidden so it is not more difficult to quickly find the information they need.

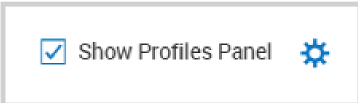
- Users can only Hide/Unhide profiles they have permissions to edit via the widget.
- A Gear icon has been added to the Dates Widget in Edit Tabs. On selecting the icon, a dialog appears listing all fields within the Dates widget with a checkbox next to it. All checkboxes are selected by default.
- If the checkbox is unselected, that field is no longer shown within the Dates widget of this user's profile. If a date is required, it cannot be hidden/unselected. It will appear in the configuration dialog with the checkbox selected (read-only) and a red asterisk next to the name.
- If a user does not have security access to a particular date via custom permission, that date option does not appear in the show/hide pop-up.
- If the user has elected to hide all dates associated with the grey area of the dates widget, the grey area no longer appears in the widget. If a user has elected to hide all fields, a message will appear in the widget stating that users has hidden all fields and should navigate to edit tabs to expose fields.

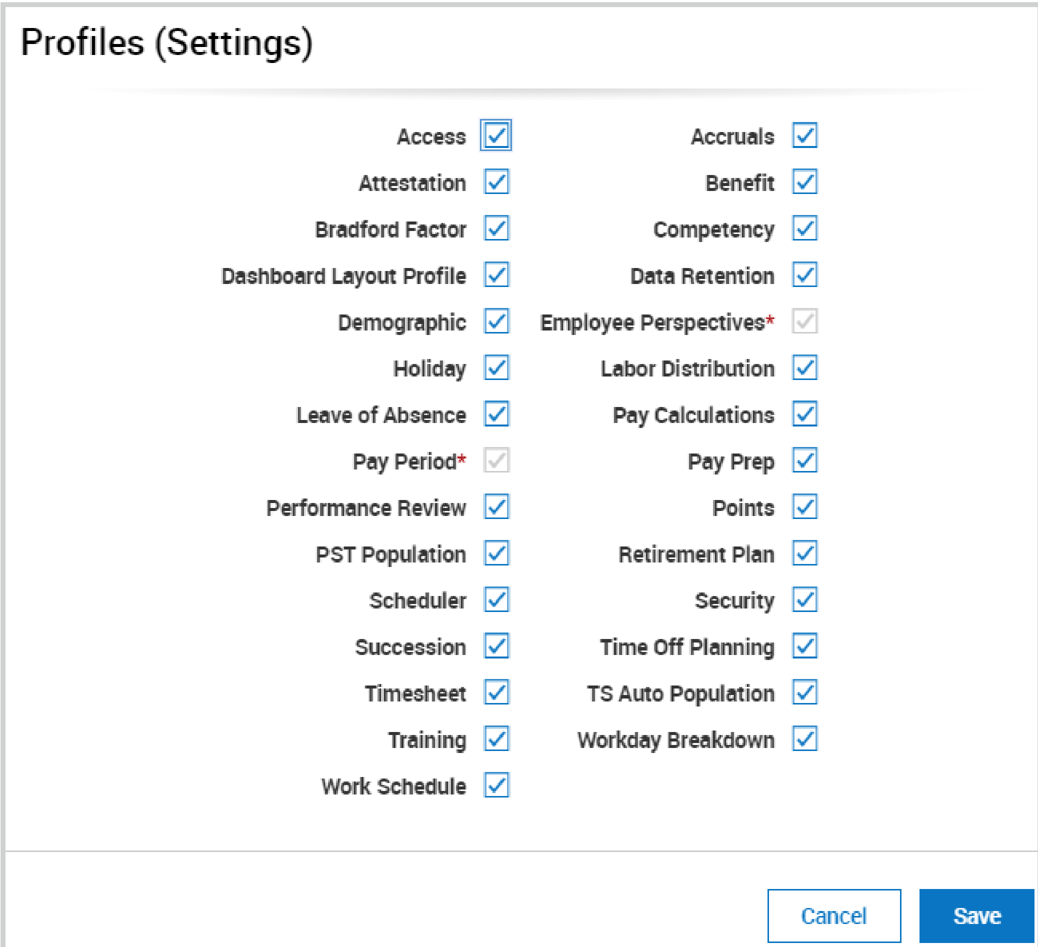


Profiles Widget: Hide Fields

****This functionality is only available in the multi-column (compact) Employee Profile view.****

WFR-214642: Users with Edit Access to the Employee Profile and the Profiles Widget and the ability to edit their tab configuration (Edit Tabs) can now customize the Profiles widget based on their own needs using the gear icon for the Show Profiles Panel in Edit Tabs. Users can only hide/unhide profiles they have permissions to edit, and if a user does not have security access to a particular profile, that profile option will not appear in the show/hide pop-up.





Upon selecting the gear icon, a dialog appears that lists all fields within the Profiles widget with a checkbox next to it. All checkboxes are selected by default. If the checkbox is unselected, that field is no longer shown within the Profiles widget of this user's profile. If a profile is required, it cannot be hidden. It will appear in the configuration dialog with the checkbox selected (read-only) and a red asterisk next to the name.

If a job is selected that applies to a default profile, the following will happen after job selection users receive a pop-up with the following language: **By selecting {job name} a default profile will be applied to {profile name(s)} for this user**.

If a user has elected to hide all fields, a message appears in the widget stating that all fields are hidden.

Dashboard Header Configuration

****This enhancement only applies to the New UI Dashboard.****

WFR-217248: Users can view relevant information about themselves the header of their Dashboard. The following pieces of information always appear in the header:

- Employee Photo (or placeholder photo)
- Employee Name

Up to 3 sections of employee information can be included in the header. The order of fields is determined by the order they've been selected in via the configuration.

If one or more date options are selected, the date is reflected in the Company's date locale. If the user does not contain information for the configured field, nothing displays for the field.

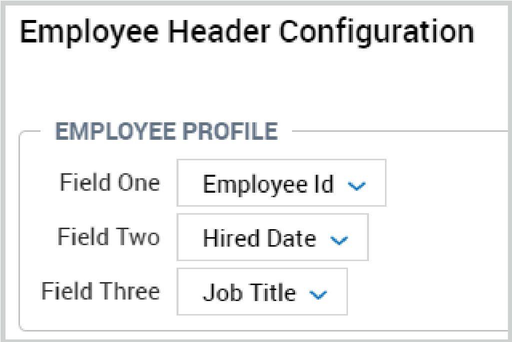
Employee Profile Header Configuration

****This enhancement only applies to the New Look Employee Profile (Single and Multi-Column).****

WFR-217245: Users can view information about their employees that is relevant via the header in their Employee Profile using settings in the Employee Header Configuration section in the Company Setup (**Company Settings > Global Setup > Company Setup**). The following information always appears:

- Employee Photo (or placeholder photo)
- Employee Name

Up to 3 sections of employee information can be included in the header. The information does not appear in the mini header. If one or more date options is/are selected, the date is reflected in the Company's date locale.



If the user does not contain information for the configured field, nothing appears.

My Profile Header Configuration

****This enhancement only applies to the New Look Employee Profile (Single and Multi-Column).****

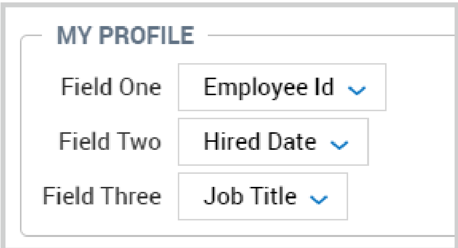
WFR-217246: Users can view relevant information about themselves via the header in My Profile. The following information always appears:

- Employee Photo (or placeholder photo)

- Employee Name

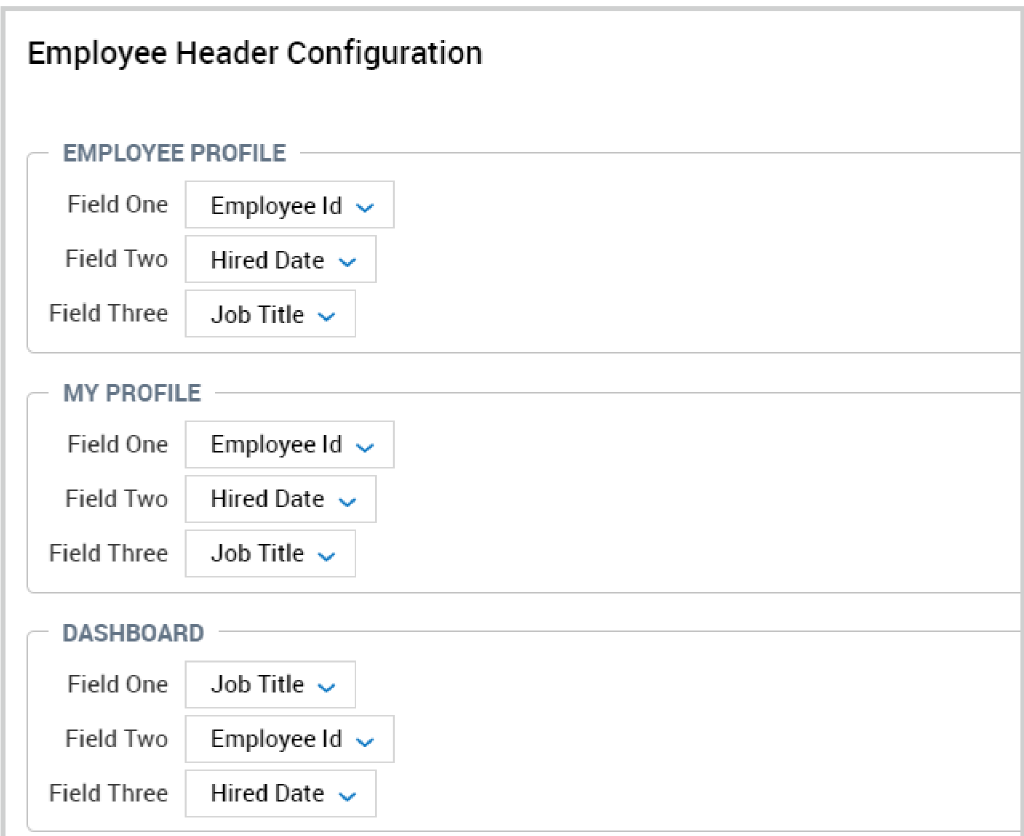
Up to 3 sections of employee information can be included in the header. The information does not appear in the mini header. The order of the fields is determined by the order they've been selected via the configuration. If one or more date options is/are selected, the date is reflected in the Company's date locale.

If the user does not contain information for the configured field, nothing appears.



Default Selection Displays for Header

WFR-229315: Default selections now display for the Employee Profile, My Profile, and Dashboard fields in the Employee Header Configuration section under **Company Settings > Global Setup > Company Setup**.



Employee Profile Mini Header Updates

WFR-189475: Updates have been made to the Employee Profile Mini Header that impact the following pages: Employee Profile

- My Profile
- Applicant Profile
- New UI Dashboard

The following updates have been made:

- The breadcrumbs have been removed.
- All actions previously located in the dynamic footer have been moved to the mini header.
- Any overflow actions are contained within an ellipsis.
- The dynamic footer has been removed from the Employee Profile page.
- The following actions are possible for the Employee Profile:
- Save
- Download PDF
- Notes
- EIN selector

The changes have been applied to the Desktop environment only (sub mini header).

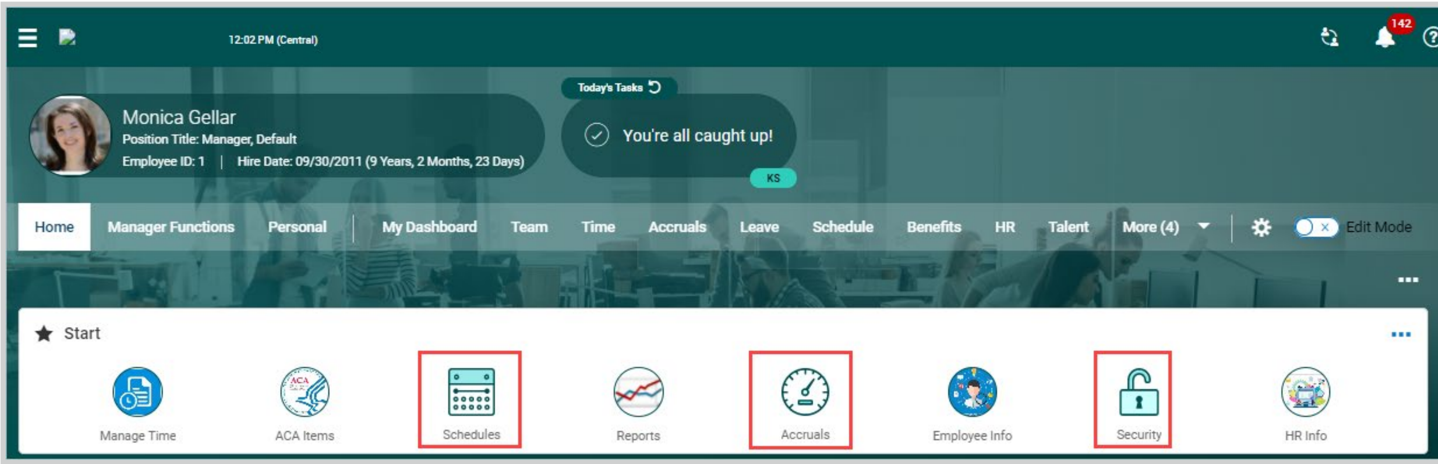
Look & Feel

Teal Color Theme Applied to Home Dashboard Widgets

EPIC WFR-139533

WFR-209576: The new **Teal** theme is available in the **Look & Feel (New UI)** widget under **Company Settings > Global Setup > Look & Feel > System Themes**. When selected and saved, your header will change to the teal color scheme.

In that Start widget, any icons selected from the standard system icons will also display with the Teal color theming.



WFR-203494, WFR-214335: The Dashboard Widget for the **Teal** theme has been added to the **Look & Feel** page. The fields on the widget are prepopulated and non-editable, and the background image is changed to the new color.

System Theme Support in Simple Look Ups and Selection Pop Ups

WFR-209428: When the **Teal** option is selected in the **Theme** drop-down from the **Look and Feel (New UI)** widget within System Themes, the following elements are updated to align with the System Theme option:

- Simple Lookups which are not report-based: Table Header and buttons, highlighted rows (upon hovering and upon selection)
- Dialog search (Selection Pop-up)

The updates are applied to **Manage Email Schedules > Company Groups** and **Annualized Projected Hours > Time Off Lists**.

System Theme Support in the e-Signature Audit Report

WFR-209443: The system now supports the new **Teal** System Theme on the e-Signature Audit Report page for the following elements:

- Header
- Hover
- Selected State

System Theme Support for Mobile (Offline mode, Reports)

WFR-212035: The buttons on dialogs in Offline mode should align with the standard design, so that:

- The image with the user's initials displays when the user has no photo.
- Highlighting of EIN drop-down options is applied.
- The default logo on tablets in Offline mode is visible.
- The highlighting on reports/report-based lookups has been updated in accordance with the system theming option.
- When a column filter is applied, the column background color is secondary.

System Theming Support for Toggle Button and TabsSet

WFR-216453: When the **Teal** option is selected in the Theme drop-down from the Look and Feel (New UI) widget within System Themes, the toggle button now displays in the appropriate color to match the theme. Additionally, for the TabsSet, the color of the line above the selected tab is consistent with the **Teal** theme, including for the My Mailbox tab.

Personalized Experience / readyConnect

Employee Birthday Redirect Change

WFR-218806: Users are now redirected to the Birthday calendar page when they select the Employee Birthday's Today Task. When selected, the user is redirected to **HR > Reports > Birthday Calendar by Week**. The report is filtered by today.

Events in My Topics Sorted Based on Priority

WFR-219946: Users can now see prioritized topics in My Topics so they will see the most important things first. Priorities impact the order an Event/Topics appear(s) in the following areas:

- **Dashboard CTA with Today's Task:** Priority 1 appears as the first green pill, followed by priority 2 as the second green pill, etc.
- **Dashboard CTA without Today's Task:** Priority 1 is the full Call to Action, Priority 2 is a green pill, etc.
- **My Topics list (readyConnect):** List reflects the priority order (i.e. Priority 1 is first, priority 2 is second, etc.)

Unread Indicator in My Topics List

WFR-225683: Users can see the red dot indicator above the readyConnect header icon, so now when they open the My Topics tab, there is an indicator identifying the topic(s) they have not yet viewed.

A blue dot indicator displays next to any event in the My Topics list that has not yet been viewed by the user. The appearance of the blue dot follows the same rules as the blue dot that appears in the

Dashboard Call To Actions when an event has not yet been viewed. Once the user views the topic, the blue dot no longer appears.

Platform

IMPORTANT! Right Click Support

WFR-230142: Navigation through right click mouse interactions may have unpredictable behavior based on the page or link being accessed. This feature is native to the internet browser, and is not a standard feature within the product, so the behavior may not be as expected at all times.

IMPORTANT! End of Life Plan for Internet Explorer 11

WFR-230143: In order to provide a modern and secure experience for our direct customers and partners, UKG Ready will end support for IE11 after the April (R74) 2021 release. Although the browser will continue to work, like the traffic UKG still sees from older versions of Internet Explorer, IE11 will no longer be qualified within the release readiness process, and IE11-specific defects will no longer be accepted.

Additional information can be found here: https://www.kronos.com/blogs/working-smarter-cafe/2021-3/what-deprecation-microsoft-ie-11s-browser-means-ukg-ready-customers

Login Pages in Application

WFR-220796: In this release we are unifying the Login pages within the application so users, regardless of company type, will see the same Login page. If you have customized your logo, that will not be affected by the consolidation effort and will still display. If you would like to change your logo, instructions can be found in the **Look & Feel** section of the **Global Setup User Guide**.

Update New UI Preferences Widget

WFR-227808: The New UI Preferences widget within the security profile (**Company Settings > Profiles/Policies > Security**) has been updated to apply to the Mobile Application specifically. The widget has been renamed Mobile Preferences.

- The Enable Mobile option has been renamed Mobile.

- The Login Credentials (Mobile Only) has been renamed Login Credentials.
- The Mobile Punch Settings has been renamed Offline Punch Settings.
- Throughout the security items, New UI Preferences has been updated to Mobile Preferences.

These updates also apply to the security profiles in an Admin company under **Maintenance > Companies > Client Resources > Global > Security Profiles**. No change has been made to the existing functionality.

An informational icon next to the Offline Punch Settings reads: **The following punch settings control the visibility of punch options for offline mobile support and the clock widget (mobile device only) within the dashboard**.

Padding Between Buttons and Inline Message in Report-Based Widgets

WFR-184989: In the report-based widgets such as the Timesheet Awaiting My Approval widget, in the New UI Dashboard there is padding between the buttons and inline message, which improves the readability of these objects.

Support of Universal/Application Links

WFR-167467: Support of universal/application links to iOS and Android is now available. When a 3rd party application (i.e. UltiPro mobile or browser) uses a platform (iOS/Android) to open an app link, the HCM To Go Mobile App is opened if installed.

Reports

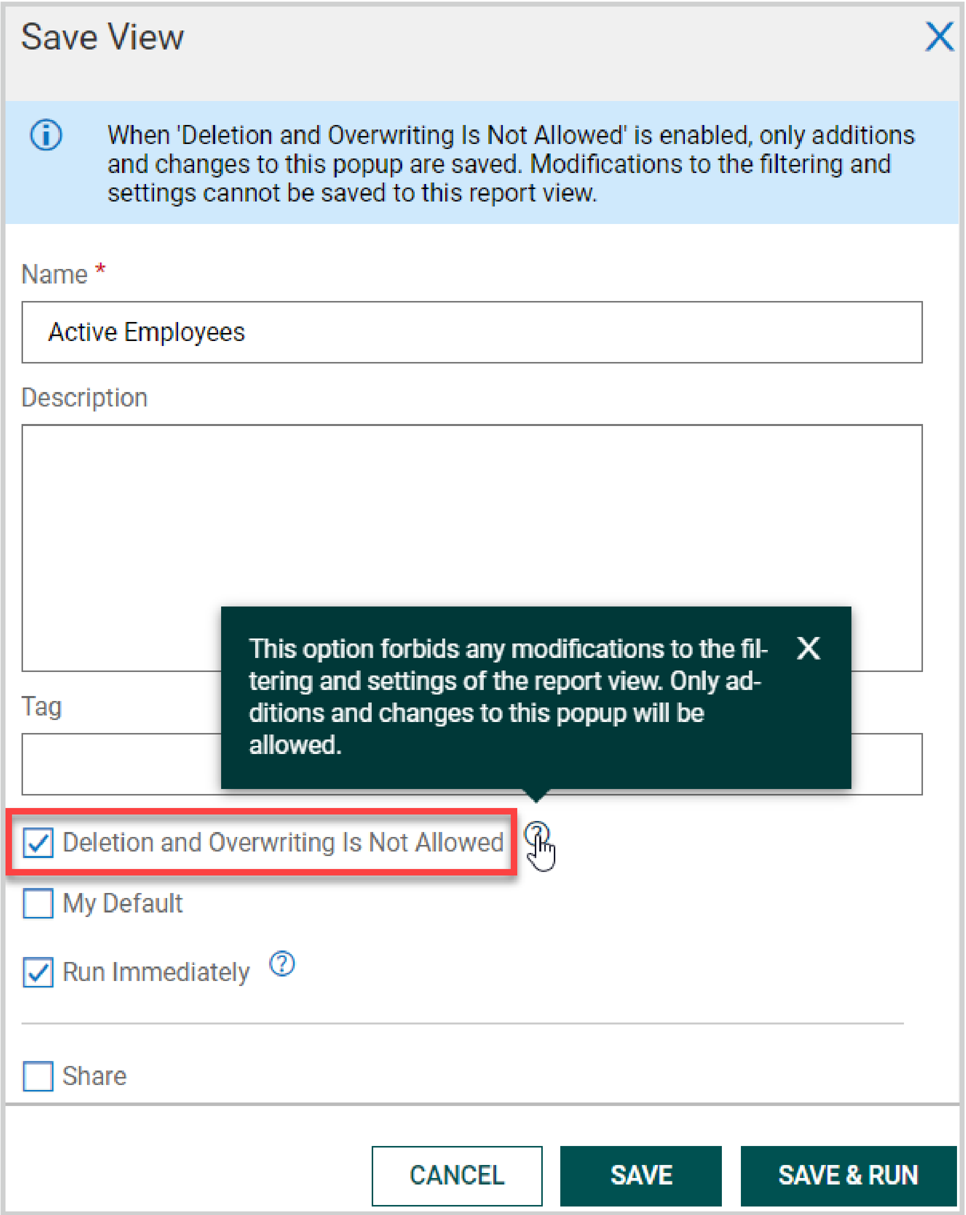
Row-Level Actions in Report/Chart Tiles

WFR-203082: Row-based actions that were previously not yet supported for certain reports when they were placed in Report/Chart tiles are now supported. These columns no longer appear without the icons, and users can now execute a particular action (i.e., Edit, View, Preview, etc.). Work is in progress to address any remaining not yet supported actions in upcoming releases.

Prevent Overriding with Deletion Is Not Allowed Setting

WFR-148350: Users can prevent overriding views with the **Deletion is not Allowed** setting enabled. The **Deletion Is Not Allowed** setting has been renamed **Deletion and Overwriting Is Not Allowed** in Save View, Save View As, and Edit (Save View pop-up triggered via Manage Views/ Edit from My Saved Reports page).

If a user saved the view with the **Deletion is not Allowed** setting enabled, then the Save View action is grayed-out within the report action popover.



Dashboard Framework

Added Pay Period Profile Selector to Time Summary Report

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

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

> **Note:** For TLM Enterprise customers, the **Time Summary** report is currently only available inside the New UI Dashboard widget, **Time Summary**.

Security

Add Make Default for All Security Item to Permission Dashboard

WFR-208660: The security item **Make Default for All** has been added to the security profile in the **Sharing** section on the Dashboard tab. This item permits/restricts setting of the Company Default view for all users in the company.

The **Dashboard Sharing** and **Manage Company Type Views** security options should also be enabled when enabling **Make Default for All**. When the security item **Make Default for All** is enabled, then the related checkbox is displayed under the **Shared With All** radio button on the **Save View...** and **Save View As...** .

Webclock

Updated Naming in Areas Used by Mobile Quick Punch

WFR-226118: Due to the Classic Mobile App being deprecated, in all areas where settings apply to Mobile Quick Punch, **Classic Mobile Preferences** (under **Company Settings > Global Setup > Company Setup**) has been renamed to **Mobile Quick Punch Preferences**.

Mobile Quick Punch and Change Cost Center

WFR-213642: As previously available in the Classic Mobile App, Quick Punch and Change Cost Center options are now available for users to quickly clock in and out or change cost centers from the login screen in the New Mobile App.

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

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

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

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

Feature Retirements

The table below documents functionality that has been retired or is planned to be retired. This table will be updated as needed with every system release.

Retired Features

Product or Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
TLM	Classic Timesheet view	N/A	All	All timesheet users will be switched to the New Timesheet view, and the Classic Timesheet view will no longer be available.	June 2021
TLM	**Rules Analysis** page	**Team >Time > Reports > Time Allocation > Rules Analysis** and My Info > My Reports > Time Allocation > Rules Analysis	All	This page will no longer be supported.	June 2021
Platform	Internet Explorer 11: End of Support	N/A	Platform	In order to provide a modern and secure experience for our direct customers and partners, Ready will end support for IE11 after the April (R74) release. For Additional information, please see: https://www.kronos.com/blogs/working-smarter-cafe/2021-3/what-deprecation-microsoft-ie-11s-browser-means-ukg-ready-customers	April 2021

Product or Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Scheduler	Schedule Table View	Team > Schedule > Schedules	All	This view is not user-friendly. From any of the views, Print Preview will still be available, which includes the same information for printing with additional options as to which shifts should be included in the printout.	April 2021
Scheduler	Schedule Overview By Date Range	Team > Schedule > Schedule Overview	All	This view is not user-friendly. You will still be able to bring in multiple schedules via the **Summary By Employee** report, but not in a schedule-like view.	April 2021
Platform	Enable Desktop security setting	**Security Profiles: Company Settings > Profiles/Policies > Security**	Platform	With the move to the New UI being complete, this setting is no longer valid.	February 2021
TLM	Time Entry Approval report	My Reports > Time Reports > Time Allocation > Detailed Hours Overview	Desktop	This report is no longer supported. A warning message at the top of the report will display in R72, "The **Time Entry Approval** report setting in the **Detailed Hours Overview** will be retired in the February 2021 release. Time Entries can alternatively be approved from the **All Time Entries** report, **Approve Time Entries** report, or directly within timesheets."	December 2020
HR	**HR SBE (Small Business Edition) **Partner Resellers Only****	Available Functionality	All	Functionality No Longer Supported	December 2020

Product or Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Platform	My To Do Items My Mailbox	Main Menu Start Widget Quick Links	New UI, Desktop and Mobile	Updated in the New UI. To access My To Do Items and My Mailbox users can click the My Mailbox indicator (bell icon, upper right hand corner)	December 2020
Full Application	Wiki	Company Settings > Our Company > Wiki My Info > My Company > Wiki	All	Functionality No Longer Supported	December 2020
TLM	VCA Configuration For Report Dialogs In Notifications	Employee Profile	Desktop, Mobile Version on Desktop, and Mobile	The VCA Configuration For Report Dialogs In Notifications section of the Employee Profile (which includes the **Enable Virtual Code Authentication** checkbox) is no longer supported. In replacement of the verification code, a security token has been built into the link of the report.	December 2020
TLM > Timesheet Profiles	Non-supported Timesheet Profiles	Company Settings > Profiles/Policies > Timesheets	New UI	Non-Supported Timesheet Profiles	October 2020
Classic Mobile App: Partners	TotalHRWorks	N/A	Classic UI	Update to New UI version **HCMToGo**	August 2020

Product or Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Our Company in Company Settings My Company in My Info	Wiki Functionality	Company Settings > Our Company Also removed from Online Help	New UI	Functionality Removed	August 2020
Platform	Report Retired	ADMIN level Mobile Log Statistic (Unique Users) report	Classic UI and New UI	This report has been removed.	June 2020
Platform	Report Retired	ADMIN level Mobile Log Statistic (Requests) report	Classic UI and New UI	This report has been removed.	June 2020
Platform	Report Retired	ADMIN level Mobile Demo Request report	Classic UI and New UI	This report has been removed.	June 2020

Bug Fixes

The following issues have been resolved in this release.

Actions Framework: Submit Not Translated into French

WFR-230172: In HR Actions, the word **Submit** now appears as **Soumettre** for French language users.

Billing: Empty Columns in Pending Increases Report

WFR-150073: In the **Pending Increases** report with **Auto-Increase Pricing** enabled, the **Auto Increase %** column and the **Auto Increase Frequency** column now display their data as expected. Previously, in this situation, these columns were sometimes empty.

Billing: Generating Invoices for Last Month Created Multiple Invoices on Multiple Payrolls

WFR-205702: When a multi-EIN company configures Billing Service with a Frequency of **Payroll Prep Process (Last Month)**, and then processes payrolls, the system generates the correct number of invoices on the correct payrolls. Previously, in this situation, the system sometimes generated multiple invoices on multiple payrolls.

Dashboard: Dutch Text Overlapped and was Unreadable in Widget

WFR-222210: In the Dashboard's **Today's Tasks** widget, Dutch users sometimes saw text that overlapped because it was too long to fit in the widget. This is fixed, and Dutch text now fits into this widget in a readable manner.

Notifications: Google Sheets Incorrectly an Option to Send in Emails

WFR-198904: When users created an email schedule for a saved report, the list of formats to send included Google Sheets. Because Google Sheets are cloud-based and not physical files, they can't be sent in the system emails, so the Google Sheets option has been removed from the list of formats.

Reports Framework: Editing Custom Column Affected Export Settings

WFR-228402: When users unchecked the check box for a custom column in **Export Settings** and then edited that custom column, the column's check box in **Export Settings** was automatically set back to checked. This is fixed, and users can now edit the custom column without affecting its setting in **Export Settings**.

Suite Experience: HR Action Documents Disappeared from Employee Record

WFR-224779: In an HR Action with a Documents action item, if managers submitted the HR Action for an employee they don't have Visibility permissions for, the HR Action's documents sometimes disappeared from the Employee Information record. This is fixed, and in this situation, the HR Action's documents are retained in the Employee Information record as expected.

Suite Experience: Fields did not Clear After Mass Edit

WFR-225224: On the **Mass Edit Profiles** page, when users enter values into fields and then apply the mass edit, the system then clears the fields in preparation for a new mass edit, as expected. Previously, the system sometimes did not clear the fields, which caused confusion about whether the mass edit had completed successfully.