



Scheduler 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 Scheduler Release Notes

This document contains detailed descriptions of enhancements 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.

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**.

Schedules

Added “Add New Shift” Button to Browse and Select Shifts Window



WFR-213374: As previously available in the Classic UI, in the Day, Week, and Month views in the New UI, you now have the option to add a new shift by directly clicking on the employee row. When you left-click in the row, a **Browse and Select Shift** pop-up will display shifts that the employee would be qualified for. Once a shift is chosen, select **Add New shift**. The **Manage shift** window will display where you can choose the date, adjust the shift time, etc.

This feature allows managers to be able to quickly assign a new shift to an employee from any of the schedule views.

Added Swap Selected Shift Option to Schedule Screens

WFR-213372: As previously available in the Classic UI, in the Day, Week, and Month views in the New UI, you now have the option to swap selected shifts when two shifts are selected. When you select two shifts, the pop-up will display a **swap shifts** option. This is helpful for managers who want to quickly switch shifts between two selected employees. The manager will be notified of any violations after the shift swap.

Display Assigned Time Off Colors in Schedule Views

WFR-200768: Previously, all time offs in the schedule displayed as a green color.

What’s changed: You can now assign colors to time offs, which will make the time offs easily recognizable in any of the schedule views and **Weekly Schedule**. Under **Company Settings > Global Setup > Time Offs**, choose a color for each time off from the **Time Off Color** field.

Scheduler Fairness Additional Conditions Updated



WFR-202663: From New Scheduling Fairness Rule, if Changing Start/End Time is enabled and the Compliance Payout is a time-based counter, a new section, Additional Conditions, will display. From this section, you can enter a number of hours to add to the shift or remove from the shift. The formula is:

Value * Total Canceled Hours.

Example: If the employee is required to receive half of their canceled hours, you would enter 0.50. As another example, if an employee is working an 8-hour shift and you reduce the shift to a 6-hour shift, the employee would still receive X number of hours that were reduced from their shift.

Scheduler Fairness Trigger for Posted Schedule

WFR-219766: Previously, Schedule Fairness triggered for changes made to posted schedules, but it did not trigger the workflow for adding extra pay when posting a schedule that was in violation of the Scheduling Fairness rule.

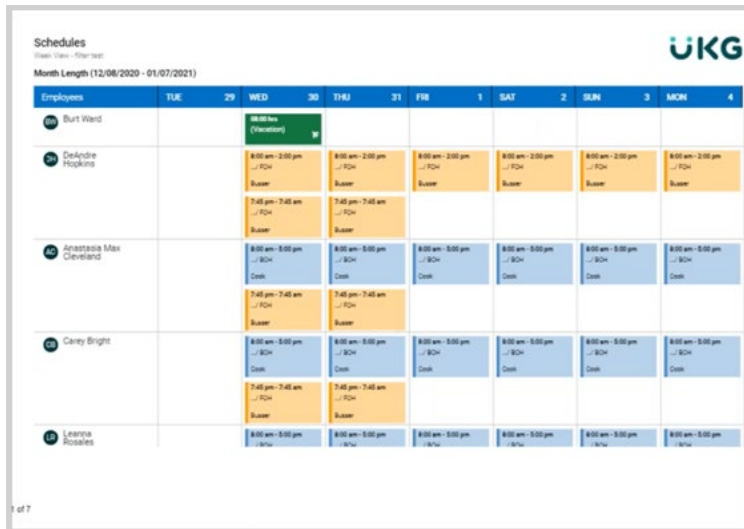
What's changed: If there are any Scheduling Fairness rules where an employee has to approve a change when a shift is added to their schedule that includes extra pay, the system will look at the shift date on the schedule, and if pay needs to be added for the shift depending on the Fairness Request Conditions, the employee will see the to-do item, as well as the extra pay.

If Schedule Start Date is selected from the Days To drop-down in the Fairness Request Conditions section and the shift is not posted within the entered number of days starting from the first day of the schedule, then the rule will be triggered upon posting, and the employee will be able to approve any shift on the schedule.

If **shift Date** is selected, the system will look at the shift date on the schedule and will only trigger the rules that are in violation within that date.

Schedule Week View PDF Print Version

WFR-181116: You can now download a PDF print version of the **view By week** schedule. From this view, click the three-dot ellipsis button at the top of the schedule, and select **Download PDF**. This print view will display the shift color, schedule name and dates, shift skill, time, and scheduled cost center.



The screenshot shows the UKG Schedules interface for the week of 12/08/2020 to 01/07/2021. The interface includes a header with the UKG logo and a table of employee schedules. The table has columns for days of the week (TUE, WED, THU, FRI, SAT, SUN, MON) and rows for employees. Each cell in the table contains shift information, including time ranges and skill requirements.

Employees	TUE	WED	THU	FRI	SAT	SUN	MON
Burt Ward		08:00 hrs (Vacation)					
Dalinda Hopkins		8:00 am - 2:00 pm Busser	8:00 am - 2:00 pm Busser	8:00 am - 2:00 pm Busser	8:00 am - 2:00 pm Busser	8:00 am - 2:00 pm Busser	8:00 am - 2:00 pm Busser
Anastasia Max Cleveland		8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk
Carey Bright		8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk
Leanna Rossini		8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk	8:00 am - 5:00 pm Desk

Feature Retirements

The following table documents functionality that has been retired or is planned to be retired:

Feature	Pathway	Functionality No Longer Available	Reason	Planned Retirement Date
Schedule Table View	Team > Schedule > Schedules	You will not be able to input shift times only for schedules, as well as copy and paste existing schedule time ranges from employee to employee. In addition, the PDF Print option will not be available.	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
Schedule Overview By Date Range	Team > Schedule > Schedule Overview	You will not be able to bring multiple schedules into one view.	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

Bug Fixes

The following issues have been resolved in this release.

Basic Scheduling: Schedule Overview didn't show all employees

WFR-205705: Managers with security permission to see all company employees can now select from all employees on the `schedule Overview` page, as expected. Previously, some managers with this security permission could select from only employees in their group.

Reports: Users couldn't assign shifts from Open Shifts report

WFR-209276: On the `open Shifts` report, some users with the correct security permissions could not assign shifts. This is fixed, and these users can now assign shifts on the `open Shifts` report as expected.

Schedules: Schedules with terminated employees didn't generate

WFR-215167: When a schedule included a terminated employee with no termination date entered, the schedule sometimes would not generate, with no notification as to why it didn't generate. This is fixed, and the system now allows schedules to generate with terminated employees who have no termination date.