PAYPRO
Workforce Management

Summary Release Notes

October 2020

R71

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

Enhancements

The Summary release notes contain a summarized listing of all enhancements pulled from the detailed release note documents (TLM, HR, Cross Product, Payroll, Scheduler). These summaries are intended to give you an overview of what was released and do not contain supporting screenshots and all details. For larger enhancements it's always recommended that you also download the detailed notes.

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!

TLM Enhancements

The following enhancements have been added to this release.
For full details on any of the following enhancements, including screen shots, please see the detailed TLM release notes for October 2020.

Accruals Balance Widget – Hyperlinks for Accruals Policies

WFR-182515: Previously available in the Classic UI, in Desktop, from the *Accruals* widget in the Employee Profile, the time off categories (displayed under the *Type* column) are now hyperlinks.

Added Latitude and Longitude to V2 Time Punch API

WFR-195306: Previously, the V2 API could be used to bring punch data in for employees but did not have the ability to pass latitude and longitude data. Because this data could not be brought in, the location of the punches could not be validated with the *Check Distance* rule in the timesheet.
What's new: Latitude and Longitude fields have been added to the V2 Time Punch API.

Added Profile ID to Attestation Profile Report APD – Report Conversions for Mobile Version on Desktop

WFR-193585: To improve system integration capabilities, the *Attestation Profile* report, the *Points Profile* report, and the REST API have been updated to include the *Profile ID* column.

Allow Color Selection for Time Offs

WFR-177553: Previously, the system assigned color values automatically to time off types without the colors matching expectations for the types of time offs.
What's new: From *Time Off Properties*, you can now choose a color from the *Time Off Color* selector, and the system will assign that color for that particular time off.

APD – Report Conversions for Mobile Version on Desktop

All Punches Detailed/Summary Show Map Button

WFR-192354, WFR-182710: The *All Punches Detailed* and *All Punches Summary* reports under *My Info > My Reports > System Reports > System Utilities > All Punches > All Punches Detailed* (or *All Punches Summary*) now contain the *Show Map* button in the Desktop version of the Mobile App.

Calculated Time by Work Day Report Utilities Actions

WFR-182707: In the Desktop version of the Mobile App, a *Utilities* action button is now available in the *Calculated Time By Work Day (Time Entries)* report (*Team > Time > Reports > Calculated Time > Calculated Time Summary*). These utilities are only available for companies using Pay Calculations 2.0. Support for Pay Calculations 1.0 will be available in R72.

CMS Submission Report

WFR-182696: The *CMS Submission* report under *Team > Time > Reports > CMS* is now available in the Desktop

Detailed Calculated Time Report "View Counter Summary"

WFR-182709: On the Desktop version of the Mobile App, in the *Detailed Calculated Time* report (*Team > Time > Reports > Calculated Time > Detailed Calculated Time*) the *Counter Summary* option is now available when you select *View By* under the *Current view* drop-down.

Detailed Hours Overview (PDF) – Report

WFR-182699, WFR-193946: The *Detailed Hours Overview (PDF)* report under *Team > Time > Reports> Time Allocation* is now available in the Desktop version of the Mobile App. As previously available in the Classic UI, the image of the columns in this report can be clicked, and you will be navigated to the applicable timesheet.
In order for you to perform actions in the non-PDF version, the *Detailed Hours Overview* and *Detailed Hours Overview (PDF)* reports contain an *Additional Settings* gear icon, which when selected, will display an *Additional Settings* panel where you can enable settings such as *Start/End Time Calc* and *Time Entry Approval*.

Attestation Punch

Daily Attestation Summary Report – Added Attestation Category Filter

WFR-181911: Previously, the *Daily Attestation Summary* report only tracked Attestation data for End Of Shift.
What's new: *Attestation Category* has been added to the *Filters* window in the *Daily Attestation Summary* report, which allows you to enable categories that you would like to view summaries and percentages that will display in this report.

New Punch In Filter Option to Reference Schedule

WFR-185285: Attestation can now be triggered within a specified window of time after the employee's In punch.

Configuration Summary

Transfer Pay Calc Profiles Rules

WFR-191793, WFR-191792, WFR-187040: Users can now download from *Pay Calculation Profiles* an easily understandable configuration PDF summary document. The Pay Calc rules *Move Counter* and *Copy Counter*, and *Set Counter* contain their own customized structures in the PDF summary document.

Converted .clock Page

WFR-181909: The .clock Log In page has been converted to the New UI view. Any enabled Extra Buttons will display here with the same look as the New Timesheet.

Deleting Zeros in Raw Time and Piecework before Inputting Time in New Timesheet – Mobile/Mobile on Desktop

WFR-176615: Previously, when users opened the new timesheet in the mobile app or mobile on desktop and typed into a field that had default zeros, users had to delete the zeros to be able to add time or move the cursor to insert time with zeros.
What's new: Users can now add an amount to the following fields without having to delete the zeros first:

- Raw Total/Hours (for both timesheet profiles; under *Extra Pay & Counter Adjustment* and *Adjustment* tabs)
- Amount (under *Extra Pay* tab)
- Piecework, Percentage Hours, Quantity (for both timesheet profiles; under *Extra Pay & Counter Adjustment*, *Adjustment*, and *Extra Pay* tabs)

Employee Profile Accruals Balance Widget – Updated Order of Fields

WFR-188076: Previously, in Desktop and the Desktop version of Mobile, the order of the fields in the *Accrual Balance* widget in the Employee Profile were changed from the Classic UI.

What's changed: The fields in the *Accrual Balance* widget in the Employee Profile will now be in the same order as the Classic UI.

Extra Pay with Out Punch

Extra Pay on Out Punch to Work with Counter

WFR-182729, WFR-187562, WFR-182722: In the previous release, when *Collect Extra Pay With an OUT Punch* was enabled in the *Timesheet Punch Settings* section, Pay Category options would display, which was only relevant for Pay Calc 1.0 companies.
What's changed: Going forward, when *Collect Extra Pay With an OUT Punch* is enabled for desktop, mobile, .clock, and InTouch device users, Counter options will be available to choose from.

MCC Widget – Search

WFR-192538: Previously available in the Classic UI, in the Desktop version of Mobile, a search bar has been added to the *Managed Cost Centers* widget in the Employee Profile to allow customers with a large number of cost centers to easily find the cost center that they need.

InTouch DX v1.1.1.68 Verification

WFR-184221: New v1.1.1.68 firmware has been added to InTouch DX devices.

Master Timesheet

Navigation and Punching with Master Timesheet (Desktop, Mobile App, and Desktop Version on Mobile)

WFR-85950, WFR-85951: Employees can now punch into multiple EINs and see their time entries on one timesheet. All punches will be routed to the primary timesheet, and all child accounts (timesheets) will point to the master timesheet.

ESS – Time Off Request (Desktop, Mobile App, and Desktop Version on Mobile)

WFR-85953: When *Master Timesheet* is enabled and an employee has an account in multiple EINs, the time off requests will always populate to the master timesheet. When the employee requests time off from any of their EIN accounts, the time off request will populate their master timesheet, and the time off will default to their primary EIN cost center unless specified otherwise in the time off request.

MSS – Time Off Request (Desktop, Mobile App, and Desktop Version on Mobile)

WFR-90869: When *Master Timesheet* is enabled and an employee has an account in multiple EINs, managers will only be able to view the time off request history for master accounts and requests for a Time Off Request on behalf of employees will default to their primary accounts once submitted.

Timesheet Change Request (Desktop, Mobile App, and Desktop Version on Mobile)

WFR-85954: Timesheet Change Requests can be submitted, and the history can be viewed by employees (under *My Info* > *My Time* > *Timesheet* > *Timesheet* > *Change Requests*) from their master account.

MSS/ESS – View Accrual Balances (Desktop, Mobile App, and Desktop Version on Mobile)

WFR-90873, WFR-85956: Only employee accrual balances (*My Info* > *My Time* > *Time Off* > *Balances*) and history will be visible for master accounts. The accrual balance will be reflective of the master account's balance.

Mass Delete Requests via Pending Approval Reports

Mass Delete Functionality for Time Off and Timesheet Change Requests

WFR-193181, WFR-189313, WFR-190010: Previously, managers did not have the option to delete outdated or invalid time off requests via the *Pending Approval* report (*Time* > *Time Off* > *Pending Approval*) and *All Open* report (*Time* > *Time Off* > *All Open*), nor timesheet change requests via the *Pending Approval* view (*Time* > *Timesheets* > *Change Requests*), as a mass action.
What's new: A delete button has been added to the *Pending Approval* view for *Change Requests*, as well as the *Pending Approval* and *All Open* reports for time off requests, so that managers can delete single or multiple requests at a time.

Navigation

IA Discrepancies in TLM Domain

WFR-180092, WFR-181428: The following Menu items have changed:

- Under *My Info* > *My Timesheet* > *Timesheet*:

- *Timesheet* is now ***Current Timesheet*** (new Menu path: *My Info > My Timesheet > Timesheet > Current Timesheet*)
- *My Timesheets is now* ***Historical Timesheets*** (new Menu path: *My Info > My Timesheet > Timesheet > Historical Timesheets*)
- In Desktop, *Manage Timesheets* has been removed so that all items underneath will be listed under *Timesheet*.
- In the Desktop version of Mobile, *Timesheets* has been renamed to ***All Timesheets***.
- In the Desktop version of Mobile, *Time Entries* has been renamed to ***All Time Entries***.

- In the Desktop version of Mobile, under *My Info > My Time > Points Balance*:
  - *Points Balance* will now be the last option in the list
- In the Desktop version of Mobile, under *Team > Time*:
  - *CMS Submission* has been moved from *Reports* and is now its own Menu option
- For companies with Payroll, In Desktop, under *Team > Time > Timesheets*:
  - *Payroll Generated Timesheets* has been moved up so that it will be under *Timesheets* (*Team > Time > Timesheets > Payroll Generated Timesheets*).

New Timesheet Experience Now Allows Time to End on Following Day on One Line

WFR-186904: Previously, in the New Timesheet Experience, the option for a *To* date field on the time entry tab was missing, and if any employee had time entry spanning more than 24 hours, it would not show on one line.
What's been added: When the timesheet profile is set to 24 hours or greater for *Maximum Time Span From Start To End*, a *To* date column will be added to the time entry tab.

Pay Calc 2 – "Add Extra Time During Daylight Savings Time" Not Working for EU

WFR-165103: Previously, the Pay Calc 2 rule, *Add Extra Time During Daylight Savings Time*, was not working correctly for EU customers. Going forward, this rule will work as expected. For example, if the rule is configured to add 1 hour in spring for DST and an employee works 8 hours when DST goes into effect, the calc hours will equal 8, not 7, as expected.

Pay Calc 2 – Exception Based On Weekly Rest Period

WFR-190895: According to the *Arbeidstijdenwet* (worktime regulations law) law in the Netherlands, any employee is required to have a 36-hour consecutive rest period over a period of 7 days (or 168 hours). If this law is violated and the company cannot offer information, they are subjected to a fine.

What's new: A new drop-down option, *Weekly Rest Lookback Type*, has been added to the *Exception Based On Weekly Rest Period* Pay Calc 2 rule, which will provide an exception in the event that an employee does not have a 36-hour rest period in a period of 7 days (168 hours).

Pay Calc 1 & Pay Calc 2 – Reports – PlanSource Hours Report

WFR-153555, WFR-191622: For company Admins who send employee hours from WFR to Benefits Center (Plansource) in a report formatted to their specifications for ACA purposes, the counters need to be broken into 4 specific categories, but the counters that go into each category can be different for each client.

What's new: In order for users to have a simple method of categorizing each counter into one of the 4 categories, and then have these hours summed up correctly for each employee in the report, a new standard report in WFR has been added, *PlanSource ACA Hours*, located under *Team > Benefits > Reports*. This report will take the place of all of the Pay Calc work that previously needed to be configured, as well as the custom column work.

From this report under *Filters*, you have the option to classify which counters should show up as paid/unpaid for employees, as well as employment break and special unpaid. You can also enter an organization ID from *Filters*.

For multi-EIN users, the report will pull and auto-populate the fein number from the employee's record, and for non-multi-EIN users, the report will pull the EIN tax ID number.

Payroll Export

Added EIN Name/EIN Tax ID to Payroll Export Format

WFR-187093: Employee EIN Name & Employee EIN Tax ID have been added to the Custom CSV payroll export formats.

Australia Only – Payroll Powered by Payroll Metrics Integration

External Integration: Configuration Page Added for Australian Payroll

WFR-180066, WFR-180060, WFR-177407: For TLM+HR or HR only companies with Australia enabled and using Payroll Metrics, an *Australian Payroll* option is now available. For UKG Ready customers, this can be enabled by your UKG representative, or if you have authority to edit your own company at the super admin level, you can enable this functionality.

PARTNER RESELLER NOTE: You can enable this functionality for any of your clients by editing their companies.

The option is located in the *External Integration* widget when editing a company. After adding the external integration for Australian Payroll, administrators can click the edit icon and a configuration page will display.

A *Payroll Metrics* widget is available for the user to enter the Payroll Metrics credentials to connect the two systems.

A *Configure Services* widget allows the user to configure the types of integrations that will be used.

NOTE: For Accruals, only *Payroll Metrics* (Payroll Metrics to UKG) will be supported. *UKG* (UKG to Payroll Metrics) will be supported in a future release.

From this screen, the user can also enable options such as *Payslip Download* (which will send PDF copies of those documents into the application's existing external pay statement repository) and *Timesheet Upload*.

Once these settings are saved, new menu options will be available under *Company Settings > Integrations > Payroll AU*.

WFR/Payroll Powered by Payroll Metrics Integration: WFR to Payroll Metrics Timesheet Load- Creation of Payroll Metrics Payroll Export Format

WFR-175832, WFR-187561: In order for timesheet data to be moved from the processed timesheets record to Payroll Metrics, a new standard Payroll Export Format has been created, *Payroll AU*. This can be enabled from *Company Information* in *Available Payroll Export Formats*, and once enabled, can be configured for the company.

To process payroll, from *Process Timesheets*, navigate to the *Time Prep* screen, then select *Create Payroll Interface File*.

From the *Time Prep Export* screen, if the option *Specific Snapshot* in the *Snapshot To Export* section is chosen, it will replace the data in Payroll Metrics. If the option *Snapshots Delta* is chosen, it will add the data to what is already in Payroll Metrics.

Once you are ready to send the data to Payroll Metrics, select the button next to *Upload To Payroll AU*. The data will then be posted to the Payroll Metrics system.

PR Export Codes – Added Rate Table to Employee Criteria

WFR-184504: A "Rate Table" criteria item has been added to employee specific criteria in Payroll Export Codes.

PR Export Codes Import

WFR-184493: A *Payroll Export Codes* import template is now available under the *Time & Attendance Data* category from *Import Overview*.

WFR/Payroll Powered by Payroll Metrics Integration: Accruals – "Prorata" Settings for Time Off Categories

WFR-192842: For Payroll Metrics users, there are certain time off types that will have hours values passed in the *Prorata* field of the Payroll Metrics API, and some that are passed in the *Entitlement* field. From *Admin > Integrations > Payroll AU > Time Off Settings*, users can add the new time off setting where they choose a global time off category and enable a *Prorata* setting. This time off category will have hours mapped from the *Prorata* field in the Accruals API response from Payroll Metrics.

NOTE: If a time off category does not have a time off settings configuration, hours will be mapped from the *Entitlement* field by default.

This feature is controlled by the *Payroll AU* security setting in the *Global* section of the security profile in the new *Integrations* section, and it will only be available if the Payroll Metrics external integration is added to the company.

WFR/Payroll Metrics Integration: Payroll Metrics to WFR Accruals Balances – Job Load

WFR-187566: Accrual Balance data can now be moved from Payroll Metrics to UKG so that information is updated in both systems for payroll processing (Payroll Metrics). Refer to WFR-191741 for information on Run Date Settings.

WFR/Payroll Powered by Payroll Metrics Integration: Pay Slips for Job

WFR-187581, WFR-187583: Previously, users had to manually fill out the *External Pay History* import and zip that with the pay statements, then import the files.

Users no longer have to perform this process manually. When the options *Run Task*, *Enable*, and *Payslip Download* are checked from the *External Integration* screen, and *Import External Pay History* is enabled under *Available Functionality*, the system will automatically bring pay statements from the external system to UKG. When payroll is finished, based on the Run Date Settings (refer to WFR-191741), the system will bring the pay slips automatically over from Payroll Metrics.

WFR/Payroll Powered by Payroll Metrics Integration: Run Date Settings for Job

WFR-191741: *Run Date Settings*, under *Admin* > *Integrations* > *Payroll AU* > *Run Date Settings*, is applied to Accruals and the pay slips download.

From the *Run Date Settings* screen, select the *Add New* button, and you will be prompted to select a Pay Period Profile that you want the integration to run for.

Once the Pay Period Profile has been chosen, you can select the pencil edit icon, and you will be taken to the *Run Date Settings* configuration screen, where you can configure settings for when the integration should run for a particular period.

Report Dialogs – Rejected Time Entry Re-Submission

Timesheets – Cannot Edit Rejected Time Entries in Non-Default CC – Label Change

WFR-198397: In the Timesheet Profile within the *Employee Policies* section, the *Employee Can Edit Rejected Time Entries In Any Cost Center* setting has been renamed to *Employee Can Edit Rejected Time Entries In Any Cost Center*. When this setting is enabled, employees will be able to edit from/to times in time entries in any cost center that is enabled in the Timesheet Profile that is not *Employee Editable*. When this setting is disabled, employees will only be able to edit from/to times in time entries that are in their current default cost center.

Reports – Late/Early/Absent Report – Only Include Employees Who's Scheduled Shift Has Started

WFR-181150: Previously, there was no way to get a "real-time" view of employees who had not reported for their scheduled shift. The *Late / Early / Absent Report* pulled in any employee with a schedule or time worked for any date range in the report filter. In addition, there were several columns that pulled in information related to the employee's punches/schedule, which made it hard to group or get a full view of what was happening with employees for the current day.

What's been added: A new report filter option, *Calculate Scheduled But Absent At Runtime*, has been added to the *Filters* window in the *Late / Early / Absent Report*. When enabled, the scheduled In time of the employee's record on the report will be compared against the actual runtime of the report and will adjust the *Scheduled But Absent* value when needed.

Start/End – Timesheet v2

Start/End Time Entry Settings – Prefer Default Cost Center

WFR-178110: The Prefer Default Cost Center setting in the Timesheet Profile within the Start/End Time Entry Settings section is now available in the Timesheet v2. When enabled, the employee's default cost center will be substituted over an assigned scheduled cost center on the employee's time entry.

Time Off Reports and Card View Consolidation

WFR-151931, WFR-155545, WFR-165090, WFR-192484: As previously seen in the Mobile App, managers and employees now have the ability to see *Time Off History* and *Pending Approval* reports in report and card views in Desktop and the Desktop version in Mobile.

A toggle is available to switch between the report and card views. Select the four-square icon to switch to the card view. When in the card view, select the icon next to the four-square icon to switch back to the report view.

Time Off Request Modify

Time Off Request – Allow Editing of Dates, Cost Center, TOP Type, Modify Time Off in Modify Request Pop-Up

WFR-181827, WFR-126830, WFR-179818, WFR-187485, WFR-179819, WFR-193530, WFR-184981: Previously, when employees selected time off and then had to modify the request (Dynamic Duration or Multiple Days), Time Off type, time off planning, Request Type, From/To, or cost center, users had to close the time off pop-up or cancel the request.
What's new: Users can now edit the dates in the *Modify Time Off* pop-up for full, partial bulk, and partial start/stop time off requests, as well as edit the Time Off Type, Time Off Planning Type, Request Type, and cost center. Projected Balances are also now available in the *Modify Time Off* pop-up.

Timesheet Punch Settings

Web Punch Access Profile

WFR-164425: New timesheet users can now submit punches according to the Access Profile assigned in their Timesheet Profile. If the user's IP is outside the specific range in their Access Profile, their punch will be restricted.

Timesheet v2

Bulk Timesheet – Manage Exceptions (Employees & Managers)

WFR-147273, WFR-147257: In the New Timesheet on desktop, employees with Bulk Hours timesheet profiles can now manage their exceptions for both calculated and manual.

Bulk Timesheet – Piecework

WFR-141928: Piecework is now available as a customizable tab in the New Timesheet for Bulk Hours timesheet users.

Bulk Timesheet – Show Exceptions on Time Entry Tab

WFR-133352: In the New Timesheet, exceptions can now display for Bulk Hours timesheet users on desktop and in the mobile app.

Calc Detail – Show Days

WFR-178081: Previously available in the Classic UI, from the Timesheet Profile, in the *Calculated Tabs* widget, the *Show Days* drop-down is now functional for the Mobile timesheet view.

Show Punches on Map

WFR-178079: Previously available in the Classic UI, from the Timesheet Profile, in the *Timesheet Punch Settings* section, the option *Show Punches On Map* is now available for the Mobile timesheet view, giving users the ability to see the map with the punches made on mobile.

Timesheet v2 Bulk & Start/End (All Days)

Bulk Timesheet – Start/End Time Entry Settings – Enable Break/Lunch Time

WFR-178109: Start/End timesheet employees can now enter a bulk time entry in the New Timesheet for their break or lunch time.

What's new: You can now add a Break/Lunch Time column to the Start/End timesheet.

Time Off Settings – Limit Managers Time Off

WFR-178633: For Bulk Hours timesheet profiles, in the *Time Off Settings* section, admins can now define the Limit Managers Time Off level and the time off lists that managers have access to from the *Limit Managers Time Off* drop-down.

Time Entry Collected Data – Enable Tooltip Options for Cost Centers

WFR-178639, WFR-178560: Under the *Timesheet Profile* within *Time Entry Collected Data*, Cost Center Settings contains a section, *Show In Tooltip*. These settings are now available in the New Timesheet.

Toggle for Timesheet v2

WFR-184300: For Classic timesheet users, a toggle is now available to allow employees and managers to easily switch between the classic timesheet and the new timesheet. The toggle will only be visible when the *Desktop* (classic view) option is enabled for *Timesheet View* in the Timesheet Profile. If the *Mobile* option is enabled in the Timesheet Profile, the toggle will not display.

Updated Accruals Page Titles and Menu Labels

WFR-184104: Previously, in Desktop and the Desktop version of the Mobile App, some of the Accruals page titles did not match the Menu labels.
What's changed: The following page titles have been updated to match the Menu labels, as well as some Menu labels have been updated:

- ***Run Accruals*** (under *Team > Accruals > Run Accruals*)
- ***Use By Balances*** (under *Team > Accruals > Use By Balances*)
- ***Accrual Details*** (under *Team > Accruals > Accrual Details*)
- ***Test Accrual Calculations*** (under *Team > Accruals > Test*)
- *My Info > My Time > Time Off > Accruals History* has been updated to *My Info > My Time > Time Off >* ***Accrual Details***, and the page has been updated to ***Accrual Details***
- *Company Settings > Profiles/Policies > Benefit Accruals* has been updated to *Company Settings > Profiles/Policies >* ***Accruals***, and the page has been updated to ***Accrual Profile***
  - From the *Accrual Profile* within a policy, the page will now display as ***Accrual Rule*** (previously it was *Benefit Accruals Rule*)

Scheduler Enhancements

The following enhancements have been added to this release.
For full details on any of the following enhancements, including screen shots, please see the detailed Scheduler release notes for October 2020.

Moved Schedule Settings and Schedule Templates to Scheduler Setup

WFR-167613, WFR-167615: In the Desktop version on Mobile, *Schedule Settings* and *Schedule Templates* will now display in the menu only under *Scheduler Setup* (*Company Settings* > *Scheduler Setup*).

Removed Workload Templates from Advanced Scheduling Menu

WFR-176769: In the Desktop version on Mobile, *Workload Templates* will now display in the menu only under *Scheduler Setup* (*Company Settings* > *Scheduler Setup*).

Scheduler Setup

Moved Schedule Fairness to Schedule Setup in Company Settings

WFR-181153: Previously, the Menu item *Schedule Fairness* was located under *Advanced Scheduling*. Going forward, *Schedule Fairness* will be located under *Company Settings* > *Schedule Setup*.

Updated Open Shift Report Edit Shift Screen to New UI Manage Shift Screen

WFR-170120: In a previous release, the employee selection component in the *Manage Shift* screen was updated. In this release, the *Open Shift* report will now use the New UI version of the *Manage Shift* screen, along with the updated employee selection. Previously, the New UI version of the *Manage Shift* screen was not utilized in the *Open Shift* report.

Basic Scheduler vs Scheduler

Shift Premiums Available to be Defined in Scheduler Shifts and Display in Reports

WFR-171018, WFR-171017, WFR-171019, WFR-171023, WFR-171021, WFR-194416: Shift premiums previously could only be defined and sent to TLM in TLM Basic Scheduler.
What's new: When building shifts whether manually or in workload templates (including imports for workload templates), you can now add a defined shift premium from the *Shift Premium* field when building shifts in Advanced Scheduler.
The converted shifts from Scheduler to TLM will send the added shift premium (as applicable) when a schedule is posted, or a shift is updated to a posted schedule.
For employees and managers, TLM and Scheduler reports will display shift premiums when defined for shifts.

HR Enhancements

The following enhancements have been added to this release.

For full details on any of the following enhancements, including screen shots, please see the detailed HR release notes for October 2020.

Australia Superannuation Form

Reject Option Added to Superannuation Form

WFR-177403: The superannuation standard choice form will now have a ***Reject*** button option to handle scenarios such as when an employee submits a form without proper documentation or incorrect information, and it is determined the employee needs to revise and re-submit the form.

Label Change to Submit Form Button

WFR-189709: In the ESS version of the Superannuation form, the ***Submit Form*** button has been relabeled to ***Submit***.

Australia Only – Payroll Powered by Payroll Metrics Integration

External Integration: Configuration Page Added for Australian Payroll

WFR-180066, WFR-180060, WFR-177407: For TLM+HR or HR only companies with Australia enabled and using Payroll Metrics, an *Australian Payroll* option is now available. For UKG Ready customers, this can be enabled by your UKG representative, or if you have authority to edit your own company at the super admin level, you can enable this functionality.
PARTNER RESELLER NOTE: You can enable this functionality for any of your clients by editing their companies.
The option is located in the *External Integration* widget when editing a company. After adding the external integration for Australian Payroll, administrators can click the edit icon and a configuration page will display.
A *Payroll Metrics* widget is available for the user to enter the Payroll Metrics credentials to connect the two systems.
A *Configure Services* widget allows the user to configure the types of integrations that will be used.
NOTE: For Accruals, only *Payroll Metrics* (Payroll Metrics to UKG) will be supported. *UKG* (UKG to Payroll Metrics) will be supported in a future release.
From this screen, the user can also enable options such as *Payslip Download* (which will send PDF copies of those documents into the application's existing external pay statement repository) and *Timesheet Upload*.

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From the *Run Date Settings* screen, select the *Add New* button, and you will be prompted to select a Pay Period Profile that you want the integration to run for.

- Once the Pay Period Profile has been chosen, you can select the pencil edit icon, and you will be taken to the *Run Date Settings* configuration screen, where you can configure settings for when the integration should run for a particular period.
- The *Run Date Settings* is controlled by the *Payroll AU* security setting in the *Global* section of the security profile in the new *Integrations* section, and it will only be available if the Payroll Metrics external integration is added to the company. *View*, *Edit*, *Add*, and/or *Delete* permissions can be enabled for *Pay Period Profile Run Date Settings*.

Benefits

Deduction Info Carries Over to Next Enrollment Period

WFR-14701: For Benefit Plans containing a Deduction with an associated Vendor, that allows for employee-level ACH information, a new ***Carry Over EE ACH Vendor Info*** checkbox has been added to Benefit Plans. When checked, the vendor and the associated employee-level banking information will carry over during enrollment events, which helps prevent missed payments to the vendors during the transition period of an employee selecting a new plan.
NOTE: This new setting will also work if the benefit plan is added manually, or through and HR Action or import. It is not just limited to ESS enrollment periods.

Credentials

External ID Field Added to Employee Credentials

WFR-169068: An ***External ID*** field has been added to Credential Types, located under *Company Settings > HR > Credential Types*.
When importing credentials, the document number and credential type are used to match the record from the import to the credential record. Because multiple credentials of the same type can be created with the same document number this makes importing credential record updates impossible in some scenarios. If there are multiple credentials of the same document number and credential type, the first credential is updated by the import. This new field allows for a unique identifier to be applied to credentials when importing, allowing unique credentials with the same credential type and document number to be updated.

Custom Fields

Dates in Custom Fields Display in User's Format

WFR-181995: Custom field values of date types will now be stored in the user's format as follows.

- Custom Fields are shown in the user's date format in reports (new entries) - HR Custom Fields, Demographic Custom Fields, Time Entry Extra Fields, Applicant Custom Fields, Job Requisition Custom Fields.
- Custom Fields are shown in the user's date format in PDF.
- Employees Import: User should use Date Format column for entering a date in the desired format (see Instructions tab in the import template.) Otherwise, the user's date format will be used. Note: dd (lower cases) - days, MM (upper case) - month, yy or yyyy (lower cases) - year.

Custom Forms

Custom Form Signature Fields

WFR-126352: Signature fields added to a custom form will now present to the user in the order they are configured in the custom form. Previously, no matter where a signature field was placed, end users could not sign them until they reached the end of the form. Now, users can sign the fields no matter where they are placed in the form.

Custom Form Date Format in Report Columns

WFR-104142: Previously, when creating a custom form using date fields, the resulting date format shown in the date columns of the Custom Form report page defaulted to the system date format and not to the date format set in the Locale section of the Company Setup page. Moving forward, these columns will now reflect the date format the company is using rather than the system date format.

Clone Option Added to Custom Form Fields

WFR-179787 & WFR-179786: To help speed up the building of Custom Forms, a ***Clone Field*** option is available to add the ***Fields*** widget of the Custom Forms edit page, located under *Company Settings > HR Setup > Custom Forms*, edit a page. Users require *Custom Form Edit* permission in their security profiles. Once the form is assigned, users can no longer delete cloned fields.
To add the button, click the gear icon and choose *Select Columns* and add the ***Button: Clone Field*** column to the *Selected Columns* panel. To easily identify a cloned field, it will display in the *Form Page* panel with ***Copy of*** appended to the name.

Documents

Multiple Uploads Allowed Across Platform

WFR-184745: To prevent users from having to access a document upload link/button multiple times in order to upload multiple documents, all document upload pop-ups/screens will now allow users to upload up to 5 documents without leaving the page. Upon clicking *Choose*, you can select multiple documents by using the *Ctrl* or *Shift* key on your keyboard and selecting between 1 and 5 documents from your computer at the same time. The documents will load and you can then add an optional *Document Type* or use the *Trash* icon to remove an unwanted documented. After clicking *Upload*, all the selected documents will be added.
NOTE: This functionality is not available in any of the Classic UI views across the platform.

Employee Information

The following enhancements were made within the new employee Information experience. Users can choose to use the New Employee experience as their default when clicking the New Look toggle.

Employee Documents Widget Converted to Report

WFR-195371: The Employee Documents widget has been updated as report widget. Document can now be added directly from the widget. Each column now has the standard filtering options and additional reporting options are available from the actions ellipses. Row level actions are now available to edit, delete, download, and view download history.

Viewing Compensation in Job Change History Widget

WFR-183910: Previously, users with View or View/Edit permissions to Job Change History without View or View/Edit access to Base Compensation records were able to see salary amounts in the *Annual Amount* column within the *Job Change History* widget of employee accounts. Moving forward, the security setting controlling access to compensation records will now prevent users from seeing these fields, and any other compensation fields, unless they have View or View/Edit access in their security profiles to Base Compensation.

Enrollments

Expiration Message Updated for New and Open Enrollments

WFR-169176: The user message displayed when an Open Enrollment and/or New Hire Enrollment expires has been updated. Previously the message stated the employee had 0 days left for enrollment and to complete enrollment even though they could not complete the enrollment since it is expired. It will now state the enrollment has expired.

Forms

VETS 4212 From Updated for 2020

WFR-166888: The VETS 4212 form has been updated to the current form for year 2020. The form is located under *Team > HR > Forms > Government Forms > VETS-4212*.

Hiring

Auto Population of Effective Dated/Simple Badges Added to Hiring Process

WFR-180411: An option is now available in Company Setup to auto-populate simple or effective-dated employee badges during the hiring process whether using a Hire HR Action or through manually hiring in Employee Information.

- This will work if Employee IDs are being auto-generated.
- If using Effective Dated badges, the employees Hire Date will be used as the badge's Start Date.

In the Account Policies widget of Company Setup, an ***Auto Populate*** field has been added with options to select ***Simple*** or ***Effective Dated*** badges. The Info icon message on this field will only display for companies who also have the Access Control sub-system enabled.

Manual Hire: Dashboard Layout Profile Options

WFR-163251: To help users select the correct Dashboard Layout Profile during the manual hire process, we have made some changes to the behavior of the default profile that is auto-added when enabled in Company Setup.

- Previously, when a Dashboard Layout Profile was set as a default profile to be added during the hiring process, the field was then uneditable until the hiring process was complete; then users could come back and edit the profile.
  - In this release, users with the proper security permissions can now swap out the profile during the manual hiring process even if the system assigns a default profile.

- Additionally, if the Dashboard Layout Profile is set as required in the Account Policies widget of Company Setup, the profile must be added at the time of manual hire and be assigned to employees at all times during the employee life cycle.
  - If there is no default profile set in Company Setup, the field will be blank and editable during the manual hire, and if required, must contain a value.

Rehireable Error Checkbox Added to Company Setup/HR Settings

WFR-188830, WFR-188023, WFR-187426: To prevent hiring managers from hiring a previously terminated employee from one EIN into another who was not designated as Rehireable, an error message can be enabled to stop the hiring process.
A new ***Error if Not Rehireable*** checkbox has been added to Company Setup. This will be available for the default company as well as for each EIN. As with other Company Setup settings, this will carry over to any newly created EINs.

- *Company Settings > Global Setup > Company Setup* in the *HR Settings* widget
- *Company Settings > Global Setup > Company EINs* in the *HR Settings* widget

When checked, if a terminated employee does not have the *Rehireable* checkbox checked in their *Termination Detail* section, users will receive an error and the hiring process will be halted.
In the event the employee should be hired, the employee's *Termination Detail* will need to be edited with the *Re-Hireable* checkbox checked and the hire process attempted again.
This error message will be generated for all methods of hire/rehire (HR Action or Manual hire).

HR Actions

Base Compensation/Pay Grade Updates in HR Actions

WFR-134153: In a future dated HR Action to change a pay grade and base compensation, an error sometimes displayed Employee pay is not within selected pay grade. The system has been updated to now apply the HR Action's effective date (not today's date) to the pay grade and to compare that date to the base compensation changes, allowing them to update and be approved without an error if the base compensation is within the assigned pay grade for that future date.

Pay Grade/Currency Mismatch Warning in HR Actions

WFR-186447: In the *Pay Information* widget of employee profiles, a currency mismatch warning message displays when an employee's default currency does not match the currency from the selected pay grade. This same warning will now display when updating an employee's base compensation and pay grade via an HR Action containing the *Treat Pay Grade Violation As* rule and it's set to any of the following: *Warning, Error* or *Ignore*.

Terminations: Error Warning Added When Termination HR Actions Set Up Incorrectly

WFR-173135: To prevent downstream errors for users attempting to terminate an employee, a warning message has been added when users create an HR Action containing a workflow with the Termination step. Users will be prompted to add the Termination HR Action item and make it required.

Terminations: Hyperlink to View Missing Information Added to HR Action

WFR-177683: When terminating an employee via an HR Action Termination action, if there are pending timesheets that require attention, a hyperlink to the timesheets will now be available so users can process the timesheets and then complete the termination. This functionality exists when manually terminating an employee and is now available in Terminate HR Actions.

Imports

Employees Import: Demographic Custom Fields Added

WFR-162055: Custom Demographic fields added under *Company Settings > Profiles/Policies > Demographic > Custom Fields* can now be imported through the Employees import process, using the xml version of the Employees import template and then importing through *Company Settings > Imports > Employee Setup > Employees*.

Employee Position Assignments Import: Ability to Delete Position Assignments

WFR-196116: An ***Is Deleted*** column has been added to the Employee Position Assignments import template. This column can be set to Yes or No.

- If set to Y, if there is any update for the assignment in the template within the same row or subsequent rows, the delete option will not be considered and a warning is shown to the user.
  - "Deleted assignment cannot be created. The employee's assignment has been created ignoring the deleted column value. Please review the employee assignments and adjust as needed."
- If set to N, and an invalid value (other than Y or N) is entered in the column, the row will not get deleted and a warning is shown to the user.
  - "The value for Is Deleted is invalid. Valid values are Y/N. The employee's assignment has been updated without this information. Please review the employee assignment."

Job Boards

Indeed Link on Job Board Directing to U.S. Indeed Page for AUS & EU

WFR-187631: Previously, the Indeed Job Board link was directing AUS and EU users to the U.S. Indeed page instead of the correct page for these countries. The link will now point to the proper country site if a job is posted to a different country. The country is determined based on the Country selected in the Location widget of the Job Requisition. If the job is for an unsupported country, users will be directed to the U.S. site.

New Pop-Up Message Added to Job Boards

WFR-194738: The message that displays when clicking the *View Status On Job Boards* button in the *Job Board* widget of job requisitions has been updated as follows:

- Jobs on Indeed should be available 24-48 hours after the date and time posted.

  When first opting-in to the Indeed integration, it may take up to 10 days for job content to be validated by Indeed and made visible.

Summary Tab Included in Job Description

WFR-197319: The Summary tab of Job Requisitions will now be included in the XML feed Job Description sent over to Indeed.

Pay Grade & Steps

Warning Added for Empty Fields in Pay Grade and Steps via Employees Import

WFR-177532: A warning has been added to the Employees import when using the Pay Grade and Automatic Step fields. If a Pay Grade is changed through the import, and the new Pay Grade has automatic steps, a warning will be generated if the Automatic Step fields is left blank.
The warning will display in the *Import Results* page after running the import.

New Notification When Base Comp is Changed via Automatic Pay Grades/Steps

WFR-173840: A new ***Base Comp Record Change Automatic Step*** notification has been added to the system to inform users when an employee's base compensation has been changed through Automatic Pay Grades/Steps. The notification will trigger when there are step changes in base compensation as well as if the step change results in the same base compensation. The notification is available in the *Account* category under *Company Settings > Global Setup > Notifications*.

New Notification When Last Step Reached via Automatic Pay Grades/Steps

WFR-173841: A new ***Last Automatic Pay Grade Step Reached*** notification has been added to the system to inform users when the last step in Automatic Pay Grades/Steps has been reached. The notification is available in the *Account* category under *Company Settings > Global Setup > Notifications*.

New Automatic Step Field in HR Actions

WFR-173846: User can now indicate which Automatic Step an applicant or employee should be assigned to, so the process can be completed in one place rather than having to go to the employee record or create another HR Action once the Hire, Rehire, or Regular HR Action is approved.
When the *Pay Grade* item is added to a Hire, Rehire, or Regular HR Action, and the Pay Grade selected by the recipient is configured with automatic steps (and the recipient has edit permission for Pay Grades), an ***Automatic Step*** field will be added within the HR Action so the recipient processing it can add an automatic step.

Performance Management

Profiles: HR Action Added to Review Effects in Performance Review Profiles

WFR-5123: Within the *Review Effects* widget of Performance Review Profiles, a new ***HR Action*** checkbox has been added. When checked, the drop-down will become active and users can select an HR Action to add to the profile.
The *Review Effects* update employee accounts and with the addition of the HR Action, a series of events can then be triggered to flow through specific channels prior to updating employee accounts. This will be shown to the Finalizer on the *Summary* tab of performance reviews, just as the other options do.

Profiles: More Employee Profile Fields Added to the Reviews to Finalize Report

WFR-155361: In the *Reviews to Finalize* report, all standard employee centric fields will now be available to be added as columns within the report page. The report is located under *Team > Talent > Performance > Reviews To Finalize*.

Profiles: Performance Profiles Added to Required Profiles

WFR-66787: The Performance Review Profile has now been added to the *Required Profiles* section of the *Account Policies* widget in *Company Setup* and in the *Profiles* section of the *Defaults* widget in *Cost Centers*.

Profiles: 'None' Grade Method Added to Performance Review Profiles

WFR-77812: Previously, when creating a Performance Review Profile, the only options available for Grade Method were Average and Total. We have now added the option of ***None*** for cases where ratings do not have values associated with them. When ***None*** is selected, the Final Grade option in the Performance Review Profile will also default to None and weights will be disabled.
When Grade Method is selected as ***None***, the Final Score, Total Scores section on the Summary tab will be hidden. Similarly, no total(s) will be shown in the Core Values and Competencies section.
WFR-188135: In the Review Steps of a Performance Review Workflow, the Percent for Review weight must total 100%. If the total does not equal 100%, the user receives a warning on the Review step and receives an error on the actual workflow when saving. Ratings are allowed to be configured with no value, so it is possible to need 0.0% weight total in the workflow. The workflow will now allow for 0.0% as well as 100%.

Reviews: Configuration Error Message for Incomplete Performance Reviews

WFR-168700: To prevent configuration errors, performance reviews where *Ratings* are enabled (*Functionality* widget) and *Final Grade* (*Options* widget) is set to either *Calculated*, *Selected (Numeric)*, or *Calculated (Numeric)*, and final grades are not added to the *Ratings* widget in the *Configuration* tab, users will now receive an error message. Previously, only a warning message displayed, allowing incorrect configurations to be saved.

Reviews: HTML Editor Added to Entry Tab Comments

WFR-100779: Performance Review comments that are added by reviewers in the Entry tab of performance reviews will now have more options available in the text editor. We have added a full HTML editor containing bold/italics/colors and more so you can format your comments. When printing in PDF, the formatting will not display in the PDF.

Reviews: Performance Review Options Upon Termination

Option to End Performance Review for Terminated Employees

WFR-192855, WFR-124928: When terminating an employee manually or via an HR Action, the *Items to Resolve* pop-up that displays when terminating the employee will now include options for performance reviews that are currently Scheduled and/or In Progress.
If the employee being terminated has a *scheduled* performance review, options will display to Delete, Initiate, Skip, or Ignore.
If the employee being terminated has a performance review *in progress*, options will display to Delete, End the performance review or Ignore.

- If users select *End* (a new option) the performance review will be saved on the Performance Reviews report page and show a status of *Ended*. Any pending To Do Items will be removed, and the Review will become read only.
- **NOTE**: When terminating an employee from the Employee Information page, you must toggle the New Look on for the Performance Review items to appear in the *Items to Resolve* option.

Option to Reassign To Do Item for Terminated Managers

WFR-189076: If a terminated manager has pending performance review To Do Items that require attention, resolutions will be offered in the *Items to Resolve* pop-up to Ignore or Replace With (with a field to select the user to assign to.) If reassigning the To Do Item, it will immediately be moved to the new user's To Do list.
This will trigger when terminating a manager who has existing Performance Review To Do Items (i.e., the user was a manager that was part of the Performance Review Workflow to Review, Check, Finalize etc.) It won't trigger for the To Do Items of an employee of the terminated manager who needs to process their own review.
NOTE: When terminating an employee from the Employee Information page, you must toggle the New Look on for the Performance Review items to appear in the *Items to Resolve* option.

Option to Bypass Employee Signature Step in All To Do Items Report

WFR-187133: When an employee is terminated with a pending Sign To Do Item for a performance review, other administrators can access the To Do Item from the All To Do Items report and process it. If the item has an employee signature included from the workflow, an option will become available to allow the manager/administrator to bypass the required employee signature (since the employee is terminated and cannot sign.)
The bypass will take the workflow to the next step in the workflow following the Sign path and allow the item to be completed. This requires ***Manage for all*** to be enabled in user security profiles; and the users must have access to the ***All To Do Items*** report.

Reviews: Selecting Ratings During the Performance Review Process

WFR-99371: When selecting ratings during the review process, only the ratings configured in Performance Review Profiles will display in the *Legend* pop-up next to the *Ratings* drop-down. These rating selections can be set in the profiles by editing Core Values, Competencies, Goals, etc. and adding a selection list in the *Choose Rating* field. If no list is attached, the entire list from the *Ratings* widget will be available in the *Legend* pop-up.

Reviews: Label Name Changes for Prior Reviews Button & Viewing of Incidents

WFR-189709, WFR-111833: The ***Prior Reviews*** button in Performance Reviews has been updated to more accurately reflect its purpose and has been renamed to ***View Prior Reviews***. Additionally, a new ***View Incidents*** option has been added to the list of options in the drop-down of the button.
New Name(s):

- **View Prior Reviews** (main button)
  - **View Development Goals** (drop-down option from button)
  - **View Incidents** (drop-down option from button)
    - **Note**: This option is new and will only display for users with security permission to at least view Incidents (*Employee* section of *HR* tab)

Reviews: Finalize Process Changes

WFR-182223: On the Finalize step when managers click the *Finalize* button to finalize a performance review from a To Do Item, the system will send them to ***Summary*** page instead of the *Instructions* page. Additionally, the ***Finalize*** button has been moved out from the action ellipses and is now prominent on the page.

Personal Email

Personal Email Field Added to Custom Forms & Questionnaires

WFR-182509: In the Custom Forms setup, the ***Personal Email*** field has been added in the list of options when clicking *Add New Field* and selecting *Type: Applicant* (if applicant form) or *Type: Employee* (if employee form).

- When this field is added to a custom form and the user completes and submits the form, once it is approved, it will update the Personal Email Address on the applicant's or employee's record.

In the Questionnaire setup, the ***Personal Email*** field has been added in the list of options when the user clicks *Add New Question* and selects *Type: Employee*.

- When this field is added to a questionnaire and the user completes and submits, it will update the personal email address on the employee's record.
  - The system currently does not support adding an applicant Type to a questionnaire.

Position Management

Delete Logic Added to Employee Position Assignment Import

WFR-195836: To help companies mass delete employee position assignment attributes, a new ***Is Deleted*** column has been added to the Employee Position Assignments import template. In this column, you can type Y to delete the assignment for the given row(s). Left blank, the system will assume a No answer.
Only an Assignment Number and Y are required to delete an existing assignment.

Position Management & Recruitment

Position Management Fields Added to Job Requisition Templates

WFR-170442, WFR-170444, WFR-170484, WFR-170447, WFR-170445, WFR-170499, WFR-193672: A new ***Default Position*** field has been added to Job Requisition Templates. This field will allow the template to pull in information from the Position entered and be applied to any Job Requisitions created from the Job Requisition Template.
A pop-up will inform users that any Job Title Description, Default Job and Employee Type from a Default Position will be overridden by the new Default Position selected. Adding a value to this field will override any previously copied information that was populated as a result of using the *Copy From Job Requisition* value.

Pre-Requisites

- Position Management enabled in the company

- Users must have security permissions to access, create or edit a Job Requisition Template.

Validations

- If a Position is marked inactive and if the user edits the Job Requisition Template for that Position, the user will receive an ***The default position selected is invalid*** error message when saving.
- If the Position is deleted, the Position will be de-linked from the template and the Default Position fields will be blank.

Position Updates and Default Positions

- If certain fields within a Position are updated, the impacted fields in the associated templates will be automatically updated, whether active or inactive. These fields will be updated.
  - Default Job
  - Job Title
  - Description
  - Employee Type
  - Category #1

Copying From Job Requisitions – Position/Job Values Displayed

Within the Job Requisition Templates, you can copy data from an existing job requisition into the template. When Position Management is enabled, you will see the ***Default Job*** and ***Default Position*** columns displayed in the pop-up when selecting a value for this field. These values will display whether the Position is active or inactive.

Copying Behavior in Job Requisition Templates

Users can select a Job Requisition in the *Copy From Job Requisition* look up.
Access the option from *Company Settings > HR Setup > Applicant Tracking/Recruitment > Templates Library > Job Requisition Templates*

- *Copy From Job Requisition* will show all the requisitions (Active, Completed etc.)
- Once a Job Requisition is selected for the copy, all the fields in the template will be auto-populated with data from the Job Requisition selected.
- If the selected Job Requisition has a Position available in the Default Position field, the following 4 fields will be updated with the latest data from the Position (as defined in the specified position page) and the rest of the fields will be copied from selected Job Requisition:
  - Default Job
  - Job Title
  - Description (Updated from Position Description)
  - Employee Type
- Job Category #1 is updated from the Job.
  - All these fields will be read-only once the Position is selected. If the Position is cleared, the fields will be enabled for editing again.

- If the selected Job Requisition has no Position defined in the Default Position field, data is copied as-is from the requisition.
- If the Position in the Job Requisition is set as Inactive, an error message will be generated when saving.
  - Error message is: *Selected position is inactive. Please select a valid position*.
  - If a Position is being used in a Job Requisition, that Position cannot be deleted.

Questionnaires

Hide Instructions Option Added

WFR-177156: When end users are filling out questionnaires, they will now have the option to hide Instructions to gain more screen space. This option will allow the toggling on/off of the Instructions with a ***Hide Instructions*** link when they are visible, and a ***Show Instructions*** link when they are hidden.

Recruitment

Applicants: Forgotten Usernames

WFR-178068(EPIC) & WFR-184572, WFR-134542, WFR-184561, WFR-184558, WFR-184567, WFR-184563, WFR-184571, WFR-184569, WFR-184568, WFR-184564, WFR-188415, WFR-184566, WFR-184565, WFR-184562:
To help applicants retrieve forgotten usernames, a ***Forgot Username*** option will now display on the login page under the *Username* field. When clicked, users will be presented a series of questions. Depending how they answer the questions, along with the information entered, will determine subsequent options. After clicking the link, the first screen displays the following fields.

- **Have you ever worked at (company name) before?** This will have ***Yes*** and ***No*** radio buttons. (Company name is pulled from Company DBA. If company DBA is blank, then it will use default EIN name.)
- **First Name** field
- **Last Name** field

Automatic Notification Sent to Applicants

If the system can identify and validate the user in the company database, the system will automatically send the user an email notification that includes their username and instructions for logging in. By default, only email will be used to send the notification. If you want to include SMS notifications, you will need to enable the SMS Integration with Twilio Marketplace product and set up an account with Twilio, which may involve additional fees.

Enabling Configuration of Forgotten Username Preferences

A new ***Forgotten Username Preferences*** widget has been added to the *Configuration* page for Recruitment. In this widget, administrators can enable the above process which will add the Forgot Username links for applicants on the log in page. This widget will not be added to the page by default but can be added using the *Edit Tabs* link.
Upon enabling the option, the *Username Retrieval* notification will automatically be created. A hyperlink will take you to the *Company Notifications* page where you can view or edit the notification.

Job Requisitions: New Font Added

WFR-186690: In the text editor of Job Requisitions, the Roboto family of fonts have been added.

Job Requisitions Template Report – New Columns Added

WFR-170446: When Position Management is enabled in your company, the following columns will be available to be added to the Job Requisitions Template report page, located under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Templates Library > Job Requisition Templates*. Additionally, the ***Jobs (HR)*** column has been renamed to ***Default Job***.

- **Job Requisition Template: Default Position** – the information in the column will be in the form of a clickable link in the desktop version; not currently available for mobile.
- **Job Requisition Template: Position Id** – the information in the column will be in the form of a clickable link in the desktop version; not currently available for mobile.
- **Job Requisition Template: Position Abbreviation**

Quick Apply: Questionnaire Pop-Up Updated

WFR-173190: The Questionnaire that Quick Apply Applicants use has been updated to correspond with the standard format used throughout the application. A Page link and status bar will appear at the top, and the buttons have been updated for both single and multi-page questionnaires.

Vendors Added to Conversion Tracker Company Vendors Widget

WFR-189524: The system is now updated to work with Recruitment vendors ***Recruitics*** and ***AppCast***. On the Applicant Tracking/Recruitment Configuration page, under Conversion Tracker Company Vendors, two new checkboxes appear so that users can select these vendors.

Succession Management

Option to Hide/Show Eligibility Fields in Succession Plans

WFR-51713: A ***Show*** checkbox has been added to the *Eligibility* widget in Succession Plans. This checkbox will default to show the *Successor* and *Succession Path* fields. Uncheck to the checkbox to hide the options. For example, you may not want to use these fields but do want to use the rest of settings in the plan for career planning.

Trainings/Certifications

Adding Employees to Groups When Adding Trainings/Certifications

WFR-152660: When adding trainings and certifications to multiple employees at the same time, the Company Groups option will now be available when using the employee filter after selecting *Add New > Employee(s) Drop-Down > Browse*. If the user does not have access to all the employees in the group, a message will be generated showing how many employees were not included and why. Company Profiles and the Advanced Filter are also available for selecting employees. This is done under *Team > Learning > Trainings/Certifications*.

Workflows

Generate Notification Step: Specific Email Address Added to Other HR Workflows

WFR-45789: Previously, the ability to select a specific email and enter the email address in the *Notification To* option inside the *Generate Notification* step of a workflow existed only in the Benefit Change Request workflow. This option is now available in all workflows. :

Position & Base Compensation Fields Added to HR Action Request Filter

WFR-187469 & WFR-187479: Administrators who oversee users with access to enter Position Assignment information into HR Actions will now have filters available within HR Action Request workflows. These filters can be used to route the workflow a particular way if the users forget to fill in a field or fill in a field they are not supposed to resulting in only properly completed requests moving through the approval process.
The following filters have been added to HR Action Request workflows for the *Start/On Created* and *Approve/Reject* (On Approved, On Modified, and On Rejected) steps.

Position Fields

- **Position Directly Reports To Manager** (Options to select Null or Not Null)
- **Position Assignment End Date** (Options to select Null or Not Null)
- **Position Assignment is Primary** (Options to select Checked or Unchecked)

Base Compensation Fields

- **Only Effective Base Compensation Record Added with the Date of HR Action** – will ensure that the Base Compensation effective date is the same date as the effective date of the HR Action itself.
- **Base Compensation** – will trigger if a change is made to any Base Compensation record that meets the criteria specified in the filter (this includes historical records)
- **Base Compensation Percent Change** – will trigger if a change is made to any Base Compensation record that meets the criteria specified in the filter (this includes historical records)

Payroll Enhancements

The following enhancements have been added to this release.
For full details on any of the following enhancements, including screen shots, please see the detailed Payroll release notes for October 2020.

Deductions

Auto Enroll Status now available for Retirement Plan Scheduled Deductions

WFR-185125: When a *Retirement Plan* profile has the *Auto Enroll* setting enabled, associated Scheduled Deductions now display the *Auto Enroll Status* section with a checkbox to override the setting. Previously, the Scheduled Deduction did not include the *Auto Enroll Status* section.

Payroll Reports

Successorship filter options added

WFR-184815: For selected Payroll reports that have *Payroll Type* or *Pay Statement Type* fields, users can now create filters for *Successorship Payroll Type* and *Successorship Pay Statement Type*.

Payroll Setup

Import Wages into Successorship Payroll

WFR-179083: Users can now import wages directly into a Successorship payroll. When using the Successorship Pay Statement Type, the wages listed in the pay statement should impact the wage and tax calculations for all pay statements with a current year Pay Date beyond the Successorship Pay Statement Pay Date.

Pay Statements

Delete FUTA and SUTA Only on Successorship Pay Statement Type

WFR-184825: Users with access to the Pay Statement Types setup can now delete **only** FUTA and SUTA taxes from the *Tax Settings* widget for a Successorship Pay Statement type.

Tax Forms

1099 Earning Type\Code Setup

WFR-175395, WFR-176850: The 1099 box type selections are now updated to reflect the current 1099-MISC Form for 2020. When the 1099 Rollup Earning Type is selected, users can select which box type the earnings will populate on the 1099-MISC Form. Non-employee compensation is no longer reported on the 1099-MISC Form.

2020 Form 1099-NEC to be used for reporting any non-employee compensation

WFR-175392: For 2020, the IRS has brought form 1099-NEC out of retirement for use in reporting any non-employee compensation earned in 2020. In previous years, this compensation was reported on the 1099-MISC form. Payroll users should no longer report non-employee compensation on the 1099-MISC form in 2020.

2020 Form 1099-NEC now included in Year End Processing

WFR-193262, WFR-193644, WFR-194431: Several changes have been made to Year End Processing (*Payroll > Quarter/Year End Process > Company Tax Years > Year End Process*) to facilitate usage of 2020 Form
1099-NEC:

- For the *Recalculate W2s/1099s (Optional)* process, the system now includes 1099-NEC forms.
- For the *Recalculate 1099s (Optional)* process, the system now includes 1099-NEC forms.
- For the *Approve W2s/1099s* process, labels, hyperlinks, system messages, and Approve options no longer reference 1099s but now specifically refer to 1099-MISC and 1099-NEC so that users know which forms they are working with.

Tax Reports

Tax State field renamed

WFR-170327: In several locations where Tax State was a field or column, the field or column is now named Tax State/Province to clarify that it can display a Province when required.

Unemployment State field renamed

WFR-180779: Throughout the system, in reports where *Unemployment State* was a column, the column is now named *Unemployment State/Province* to clarify that it can display a Province when required.

New icon to open Account Tax Jurisdiction

WFR-189054: On the *Tax Information* widget, the *Federal Tax Information* now includes an icon users can click to access the *Account Tax Jurisdiction* page.

Updates for Executive Order on Employee Deferral of Social Security Tax

WFR-193948, WFR-194917, WFR-194919, WFR-199308, WFR-199714: In the October 8 Service Pack, several updates were made to the system to accommodate the Executive Order to allow employee deferral of Social Security Tax. For more information, please download the document titled *Executive Order - Employee Deferral Social Security Tax* under the download category *COVID19 Resources* on your system's server.

Year End Processing

WFR-173878: For administrators, the following fields are now available for inclusion in the Admin Payroll Year End Processing report under *Maintenance* > *Administration* > *Year End Processing* > *Payroll Year End Processing* using *Select Columns*.

- **# 1099 Pages**
- **Form 1099: Generate 1099-MISC Below $600 Wages**

Form 1099: Participating in CF/SF Program

Cross Product Enhancements

The following enhancements have been added to this release.
For full details on any of the following enhancements, including screen shots, please see the detailed Cross Product release notes for October 2020.

Affordable Care Act (ACA)

Break in Service Error in ACA Profile Configuration

WFR-166576: In ACA Profiles, if the *Apply Break In Service Rules* is not checked, an error message will now display informing users to check the setting. Checking the setting will ensure the measurement and stabilization periods will calculate correctly when the employee has been rehired.

Line 15 Logic When Multiple Medical Plans are Offered

WFR-181762: To assist users responsible for ACA reporting, the system now considers each plan the employee is eligible for separately instead of all together when determining the Line 15 code to be used, so users can be assured that the amount being reported is correct.
When more than one Benefit Plan exists where the Base Type is Health, the system runs the employee through the eligibility filters and determines which plan(s) the employee is eligible to enroll in. If the employee is eligible for only one plan, the Line 15 amount should be driven based on that one Benefit Plan and the Line 14 code. Line 15 should only be populated when Line 14 is either 1B, 1C, 1D, 1E, 1J, or 1K.
If the employee is eligible for more than one plan, system logic looks to the ACA Settings widget of the plans the employee is eligible for before determining the lowest monthly cost to the employee. The system looks for the lowest monthly cost of the plans that provide at least MEC and MV to the Employee.

Line 14 Coding Logic when Multiple Medical Plans Offered

WFR-181760: To assist users responsible for ACA reporting, the system now considers each plan the employee is eligible for separately instead of all together when determining the Line 14 code to be used, so users can be assured that the code is correct.
When more than one Benefit Plan exists with a Base Type of Health, the system runs the employee through the eligibility filters and determines which plan(s) the employee is eligible to enroll in. If the employee is eligible for only one plan, the Line 14 code is driven based on that one Benefit Plan.
If the employee is eligible for more than one plan, system logic looks to the ACA Settings widget of the plans the employee is eligible for to determine the Maximum Offer of Coverage to the employee. This is where the highest number of *Yes* results appear in the *Minimum Essential Coverage* and *Providing Minimum Value* columns.

2B Coding to Report when Employee is Not ACA FT Employee and Not Enrolled

WFR-186927: For any employee who is Part Time (PT) with no Series 2 codes found for any months, code 2B populates in Line 16, especially in the case of code 1H. The system now uses code 2B to indicate the employee was not a Full Time (FT) employee when no other codes apply. Manual adjustments may not be needed for each employee's Timeline at the end of the year, ensuring correct reporting.

Export Functionality in the ACA Data Summary Report

WFR-173839: Users with access to the ACA Data Summary report (*Team > Benefits > ACA > ACA Data Summary*) can export the results of the Employee listing so they can easily see all of the employees making up the count at the same time and in various formats. .

Custom Fields

Dates in Custom Fields Display in User's Format

WFR-181995: Custom field values of date types will now be stored in the user's format as follows.

- Custom Fields are shown in the user's date format in reports (new entries) - HR Custom Fields, Demographic Custom Fields, Time Entry Extra Fields, Applicant Custom Fields, Job Requisition Custom Fields.
- Custom Fields are shown in the user's date format in PDF.
- Employees Import: User should use Date Format column for entering a date in the desired format (see Instructions tab in the import template.) Otherwise, the user's date format will be used. Note: dd (lower cases) - days, MM (upper case) - month, yy or yyyy (lower cases) - year.

Dashboards

Classic Dashboard in the Desktop Application

WFR-196928: The Classic Dashboard will continue to be supported in the Desktop application. The Dashboard button is displayed in the hamburger menu, and when a user applies the *Dashboard* button, the Classic Dashboard is displayed.

Dashboard Layout Profile Label Change

WFR-198577: The name of menu item *New UI Dashboard Layout Profiles* has changed to *Dashboard Layout Profiles* (under *Company Settings > Profiles/Policies*). The menu item moved slightly in the menu order because of the name change.

Dashboard Layout Profile Updates

Profile Report Page Updates

WFR-190169, WFR-187643, WFR-190169: The following updates have been made to the (New UI) Dashboard Layout Profiles page under *Company Settings > Profiles/Policies > Dashboard Layout Profiles*.

- Menu item ***New UI Dashboard Layout Profiles*** has been renamed to ***Dashboard Layout Profiles*** and is now formatted to be consistent with the New UI environment.
- The ***New Layout Profile*** button has been renamed ***Add New***.
- A new column has been added to the report to indicate the ***Type*** of Dashboard (i.e. *Home*)

User Modification of Dashboards

WFR-185291: For users who do not have permission to modify dashboards, updates have been made to reflect their permissions.

- Previously: Max of 9 tiles are allowed to be displayed per dashboard.
  - Now: You do not have permission to modify this dashboard. Please contact your system administrator.

- Previously: Users without modify permission were shown the options to re-arrange tiles, change the layout display, or resize the tiles.
  - Now: These users will not see these options.

Dashboard Layout Profile Schedules

Link to Announcements for Dashboard Schedule Changes

WFR-149753: Administrators and users with access to dashboard profiles will now have an ***Announcements*** button available within each profile. This button will open the maintenance page for company announcements where the users can create an announcement to announce to employees that their dashboards have or are being updated.
WFR-147938: When administrators create a new dashboard schedule, they will receive a warning message when the new schedule is created and then saved.
Introducing a new schedule period will automatically switch employee dashboard views at time of schedule change.
WFR-148098: When an announcement has been created to announce a dashboard schedule change, employees will receive a message stating their administrator has updated their dashboard layout and no action is needed on their part.
Your administrator has updated your dashboard layout. No action is needed.

Security Updates Related to Dashboard Layout Profile

WFR-188103: The Dashboard Layout Profile is now embedded in the Security Profile so that assignments can be controlled via the Security Profile (Personas/Roles/Permissions) at both the Admin (via Mass Edit) and company level. The Dashboard Layout Profile is available in Security Profiles near the *First Screen* and *Access Policy*.
WFR-193860: With the Dashboard Layout Profile embedded in the Security Profile, assignments can be controlled via the Security Profile (personas/roles/permissions). When Dashboard Layout Profile assignments are made, the following logic is used to determine precedence:
The same pattern exists for the First Screen assignment as it appears in both the Security Profile and the Employee Record.
WFR-193878: A ***Reset*** link is provided next to the Dashboard Layout Profile lookup in the Security Profile, as the system continues to support the Dashboard Layout Profile reset. When applied in the Security Profile, the ***Reset*** action impacts all users that are assigned to that Security Profile. When the ***Reset*** action is applied via the Dashboard Layout Profile, it affects all users and Security Profiles using that assignment.

Dashboard Notifications

Controlling New Widget Notifications

WFR-182444: System Administrators can now control the New Widget Notification functionality. This is controlled in the dashboard layout profiles. A new ***Show New Widget Notifications*** checkbox has been added to the Dashboards Visibility widget in the profiles. When checked, and users access their dashboards, they will be shown the new widgets pop-up which displays the new widgets added since the last system release.
WFR-185407: For users with authority to edit their own tabs, the pop-up will display upon log in to inform the users when new widgets have been added to the system since the last release. The notification has

been updated to include new widgets in this (October/November 2020) release, such as the *Links*, *Websites*, and *Time Off Awaiting My Approval* widgets.

Dashboard Widgets

Renaming of ESS Widgets

WFR-178562: To be consistent across the platform, all ESS (Employee Self Service) widgets will be prefixed with “My” and then the name of the widget. Some widgets already have this prefix. These will be seen in the dashboards, in the Add Widgets pop-up, and in the Allowed Widgets of security profiles.

Sizing of Widget Tiles Updated

WFR-156347: We have updated the process to resize tiles within widgets. This new method requires fewer clicks.
You will now see one option titled ***Adjust Size***. Upon clicking the option, the Tile/Row parameters will immediately display without further clicks.

- You can click the Plus and Minus symbols multiple times to adjust the size to your liking.
- If you are widening the tile, any tiles next to it will wrap to the next row.
- The tile will maintain the minimum size when shrinking, and when doing so, the Minus signs will gray out.

New! Time Off Awaiting My Approval Widget

WFR-174241 & WFR-146153: The ***Time Off Awaiting My Approval*** widget has been added as a new widget, which allows users to view submitted time offs that are pending approval. In the widget, users can select one or more time offs to approve/reject, in addition to selecting all rows shown.
IMPORTANT NOTE: *The Links, Timesheets Awaiting My Approval, and Websites widgets will not be available immediately following the release. The widgets will be made available via a gradual rollout across the 3-4 weeks following the October/November 2020 release (based on the initial release date for each POD).*

New! Links Widget

WFR-150930: Users can click links to important reports/screens that they access frequently in the application and/or hyperlinks from the *Links* widget, previously labeled the Quick Links widget. The updated widget now includes two tabs; one for *Quick Links* and one for *Hyperlinks*. Both tabs can be configured from the widget settings.
NOTE: Links without **http://** or **https://** entered in the Link field that are written as *wikipedia.org* or *www.wikipedia.org* will automatically open with **https://** protocol when clicked. To open links with **http://**, the protocol should be explicitly included into the Link field.
IMPORTANT NOTE: *The Links, Timesheets Awaiting My Approval, and Websites widgets will not be available immediately following the release. The widgets will be made available via a gradual rollout across the 3-4 weeks following the October/November 2020 release (based on the initial release date for each POD).*

New! Websites (External URL) Widget

WFR-143623: Users can expose one or more websites inside the *Websites* (External URLs) widget in the Dashboard. Administrators can configure the *Websites* widget via a New UI Dashboard Layout Profile Schedule. Users can edit the configuration from a Dashboard tab when the *Websites* widget is included in

the Dashboard Layout and the widget is enabled in the Allowed Widgets (*Dashboards* tab, *Dashboard Widgets* section) of the assigned security profile.
IMPORTANT NOTE: *The Links, Timesheets Awaiting My Approval, and Websites widgets will not be available immediately following the release. The widgets will be made available via a gradual rollout across the 3-4 weeks following the October/November 2020 release (based on the initial release date for each POD).*

Team Perspectives Widget: Configure Button Added

WFR-184546: Users can now configure the Team Perspectives widget from the Dashboard Layout Profile. In the Layout Profile, users can select the ***Configure*** button in the Team Perspectives tile, which opens the Team Perspectives Panel where users can apply Filters. The following are selected by default:

- **Employee Filter** = All Employees
- **Date Range** = Past Month

Documents

Multiple Uploads Allowed Across Platform

WFR-184745: To prevent users from having to access a document upload link/button multiple times in order to upload multiple documents, all document upload pop-ups/screens will now allow users to upload up to 5 documents without leaving the page. Upon clicking *Choose*, you can select multiple documents by using the *Ctrl* or *Shift* key on your keyboard and selecting between 1 and 5 documents from your computer at the same time. The documents will load and you can then add an optional *Document Type* or use the *Trash* icon to remove an unwanted documented. After clicking *Upload*, all the selected documents will be added.
NOTE: This functionality is not available in any of the Classic UI views across the platform.

Employee Information

The following enhancements were made within the new employee Information experience. Users can choose to use the New Employee experience as their default when clicking the New Look toggle.

Employee Information Report Showing Unwanted Termination Details

WFR-188592: Previously, users without permission to *Termination Reasons* in their security profile were able to see the *Termination Reason (Last)* column in the Employee Information report page. Moving forward, the *Termination Reasons* permissions will be tied to users' ability to view termination reasons in the Employee Information report page.

Employee Documents Widget Converted to Report

WFR-195371: The Employee Documents widget has been updated as report widget. Document can now be added directly from the widget. Each column now has the standard filtering options and additional reporting options are available from the Actions ellipses. Row level actions are now available to edit, delete, download, and view download history.

Employee Profile Search Widget Names

WFR-100816, WFR-168764: When the New Look is enabled for the Employee Information, users can search for widget names from within the Employee Profile using the Search field that is available for Employee Information (MSS) and My Profile (ESS).
The search is performed on widget names across all Tabs and the Employee Profile (Field names are coming in a future release). The search will execute after a few characters are entered and a pause, allowing for the search results to be seen by the user so s/he can determine if a more specific search is needed. The search results are displayed in a drop-down list and are grouped by Tab name.

Error Message for Violations of Pay Grade Range

WFR-170948: In Company Setup, when the ***Treat Pay Grade Violation As*** setting is set to *Error* or *Warning*, and Pay Grades with values have been added to employees, if a user adds base compensation values that exceed the Maximum value or is below the minimum for the assigned Pay Grade, the system will generate either the Error or Warning message. Previously, this wasn't occurring, and the system would save the value without generating the messages.

Scheduled Cost Centers Widget: Columns Added

WFR-187058, WFR-184751: The *Scheduled Cost Centers* widget in Employee Profiles will now contain additional columns. These columns will not have to be added and will be there by default. Data for these new columns is pulled from cost center defined under *Company Settings* > *Global Setup* > *Cost Centers*.

Sort Order for Most Recent Items within Widgets in Employee Profiles

WFR-184947: The content within the following widgets of employee profiles will be sorted by the most recent content at the top of the list. Users can still sort the items in any order.

- Disabilities: Sorted by Most Recent "Start Date" first
- Asset Assignment: Sorted by most recent "Issued" date first
- Additional Compensation: Sorted by most recent "Effective From" date first
- All Forms: Sorted by most recent "Created" date first
- Assignments to Positions: Sorted by most recent "Start Date" first
- Badges: Sorted by most recent "Start Date" first
- Incidents: Sorted by the most recent "Incident Date" first
- Vehicles: Sorted by the most recent "Issue Date"
- Job Change History: Sorted by the most recent "Effective Date"

Additionally, sorting of the Level column has been added to the following widgets.

- Scheduled Cost Centers
- Managed Scheduled Cost Centers

Utilities Button Added to Header of Employee Profiles

WFR-184743: A Utilities button has been added to the header of Employee Profiles. When selected, the Employee Quick Links pop-up will open, and dependent on the user's permissions, will display selectable common quick link options. The options here will be same as the Employee Utilities/Quick Links icon next to the employee's name.

Managed Cost Centers Widget Search

WFR-192538: Previously available in the Classic UI, in the Desktop version of Mobile, a search bar has been added to the *Managed Cost Centers* widget in the Employee Profile to allow customers with a large number of cost centers to easily find the cost center that they need.

Viewing Compensation in Job Change History Widget

WFR-183910: Previously, users with View or View/Edit permissions to Job Change History without View or View/Edit access to Base Compensation records were able to see salary amounts in the *Annual Amount* column within the *Job Change History* widget of employee accounts. Moving forward, the security setting controlling access to compensation records will now prevent users from seeing these fields, and any other compensation fields, unless they have View or View/Edit access in their security profiles to Base Compensation.

Hiring

Auto Population of Effective Dated/Simple Badges Added to Hiring Process

WFR-180411: An option is now available in Company Setup to auto-populate simple or effective-dated employee badges during the hiring process whether using a Hire HR Action or through manually hiring in Employee Information.

- This will work if Employee IDs are being auto-generated.
- If using Effective Dated badges, the employees Hire Date will be used as the badge's Start Date.

In the Account Policies widget of Company Setup, an ***Auto Populate*** field has been added with options to select ***Simple*** or ***Effective Dated*** badges. The Info icon message on this field will only display for companies who also have the Access Control sub-system enabled.

Manual Hire: Dashboard Layout Profile Options

WFR-163251: To help users select the correct Dashboard Layout Profile during the manual hire process, we have made some changes to the behavior of the default profile that is auto-added when enabled in Company Setup.
In this release, users with the proper security permissions can now swap out the profile during the manual hiring process even if the system assigns a default profile.
Additionally, if the Dashboard Layout Profile is set as required in the Account Policies widget of Company Setup, the profile must be added at the time of manual hire and be assigned to employees at all times during the employee life cycle.

Rehireable Error Checkbox Added to Company Setup/HR Settings

WFR-188830, WFR-188023, WFR-187426: To prevent hiring managers from hiring a previously terminated employee from one EIN into another who was not designated as Rehireable, an error message can be enabled to stop the hiring process. A new ***Error if Not Rehireable*** checkbox has been added to Company Setup. This will be available for the default company as well as for each EIN. As with other Company Setup settings, this will carry over to any newly created EINs.

Imports/Exports

Employee Picture Column in HTML and HTML (Paged) Formats

WFR-192812: The *Employee: Picture* column is now exported in both the HTML and HTML (Paged) formats if the field is included in the report that is being exported.

Marketplace Features

eBN Updated from FTP to SFTP

WFR-185290: Companies using eBN sometimes received only partial files after file transfers. This is fixed, and eBN now transfers files via SFTP to ensure the transfer of complete files.

Mobile Application

Expiration of Secured Token on Logout

WFR-172133: To increase the security of the logout process, the secured login token expires when a user explicitly logs out from the Mobile Application. Based on the Mobile Settings within the *New UI Preferences* widget of the security profile, the following setting interactions occur:

- **No Login Information Pre-Populated** - The user is returned to the Login page with no fields pre-populated.
- **Username Saved** – The user is returned to the Login page with no fields pre-populated.
- **Username and Password Saved** – The user is returned to the Login page with no fields pre-populated.
- **Biometrics** – The user is returned to the Login page with no fields pre-populated.

Open Authorization 2.0 (OAuth 2.0)

WFR-180966: OAuth 2.0 (Open Authorization) provides clients secure delegated access to server resources on behalf of a resource owner. It specifies a process for resource owners to authorize third-party access to their server resources without sharing their credentials.
The system now supports Open Authorization (OAuth) 2.0 as an alternative standard to using SAML 2.0 with the Single Sign On (SSO) functionality. Users can add and configure OAuth 2.0 for Admin and Holding companies and it is available to Partner resellers as well as direct customers/clients. OAuth 2.0 must be configured for each individual company, as the configuration does not cascade down to all companies.

Today's Tasks Widget

The following updates have been made to the Today's Tasks widget on employee dashboards.

Interviews to Attend

WFR-166625: Recruiters with access to *Security Profile > Security Items > HR tab > Recruitment section > Applicants* will now have an ***Interviews to Attend*** task in the Today's Tasks bar. This will be available on the Home dashboard and Recruitment dashboards. The information in the task will have an icon, number, and link to the content. Selecting the widget will direct users to *Recruitment > Candidates > Applicant Interviews*.

Employee Anniversary

WFR-164173: Managers with access to *My Reports > HR Reports > Calendar > Anniversary Calendar (Security Profile > Reports tab > Employee Information Reports > Anniversary Calendar)* will now have an ***Employee Anniversary*** task in the Today's Tasks bar. This will be available on the Home dashboard and Team dashboards. The information in the task will have an icon, number, and link to the content. Selecting the widget will direct users to *HR > Reports > Anniversary Calendar filtered by Type: Started*.

Employee Birthdays

WFR-164170: Managers with access to *HR > Reports > Calendar > Anniversaries by Month (Security Profile > Reports tab > Employee Information Reports > Anniversary Calendar)* will now have an ***Employee Birthdays*** task in the Today's Tasks bar. This will be available on the Home dashboard and Team dashboards. The information in the task will have an icon, number, and link to the content. Selecting the widget will direct users to *HR > Reports > Anniversary Calendar filtered by Type: Birthday*.

Reports

Advanced Filter: Sharing Reports

WFR-184056: When sharing a saved report view with other users in your company, previously if you set an advanced filter for the selection it would not successfully allow users to view the saved view via My Saved Reports. Now, the selection made via an advanced filter is working correctly for sharing the report view.

Deliver with Payroll – View and Edit Payroll Types Lists

WFR-186714, WFR-189479: Users can view and/or edit the Payroll Types List so they can configure the *Deliver With Payroll* feature for reports appropriately, to properly execute a report once a payroll is processed. Users must have the **Schedule Reports To Deliver With Payroll** security item enabled in their assigned Security Profile (*Company Settings > Profiles/Policies > Security > Payroll* tab, in the *Payroll* section) to use the *Deliver With Payroll* functionality inside Saved Views.
Users should also have Add/Edit permissions to the **Payroll Types** security item (*Company Settings > Profiles/Policies > Security > Global* tab, in the *Object Lists* section) to edit the list of Payroll Types while configuring the *Deliver With Payroll* option.
NOTE: Deletion of Payroll Types Lists is not currently supported, and this capability will be provided in a future release.

Deliver with Payroll - View (Selected/Not Selected) and Edit Pay Period Profiles Lists

WFR-189477, WFR-186713, WFR-186712, WFR-96716: Users can view and/or edit a Pay Period Profiles List so they can review or update the configuration for the *Deliver With Payroll* functionality for Saved Views of reports appropriately, to properly execute a report once a payroll is processed.
Users must have the **Schedule Reports To Deliver With Payroll** security permission (*Company Settings > Profiles/Policies > Security > Payroll* tab, in the *Payroll* section) enabled in their assigned Security Profile to utilize the *Deliver With Payrol*l functionality inside Saved Views. Users must also have access to View and Add/Edit the **Pay Period Profile** security item (*Global* tab, in the *Object Lists* section) to view or edit the list of Pay Period Profiles while configuring the *Deliver With Payroll* option.
NOTE: Deletion of Pay Period Profiles Lists is not currently supported, and this capability will be provided in a future release.

Deliver with Payroll: Add/Remove List Items in Deliver With Payroll

WFR-190111: Users can Create New lists or View/Edit existing lists where they can add and remove items tied to profiles (*Pay Period Profiles*) and definitions (*Payroll Types*) for use in the *Deliver With Payroll* configuration. In addition to editing items, users can also optionally change the name of a list.

Export Report with Employee Picture Time Out

WFR-174537: If a report has the Employee Picture column added, and at least one employee has a picture uploaded, if the report has more than 200 records (i.e., the Employee Information report), all export formats now have improved performance and will not time out.

Time Zone Corrections in Reports

WFR-184205: Time Zones in reports now reflect the correct time zone based on the time zone in the *Locale Settings* for the current user/company. In a Multi-EIN company, the Time Zone follows the Company EIN the user belongs to. If the user EIN is set, it takes precedence over the Company EIN Time Zone.
This update was done in previous releases for other reports and continues in this release with the following reports or report pages.

- Data Removal Requests
- Job Info History
- Assignment History
- WFR-189388: Additionally, the following reports have also been updated to reflect the correct time zones.
- Leave Request History/History
- IntelligentUnitDoor.xml
- IntelligentUnitReader.xml
- AccountSchedulePlannerShifts.xml
- LOARequestHistory.xml
- MyLOARequests.xml

Security

RSA Token Tables, Columns and Associated Items Removed

WFR-179295: All RSA related columns, tables, and associated items have been removed from the system.

Signature Settings

Form I9 Wet Signature & Biometric Signature Support

WFR-169191, WFR-191548: Users can now “wet sign” the I9 Form document in cases where an actual written signature is required. A **Form I9** checkbox can be selected in the *Wet Signature* section of the *Signature Settings* widget (*Company Settings* > *Global Setup* > *Company Setup*) to enable this functionality.
When an I9 form is signed with a Wet Signature, the audit reports will show **Wet** under Signature Type.

Biometrics Signature

WFR-172218: Users can now sign with biometrics on their mobile devices using either their face or Touch ID.

Pre-Requisites
Company Settings > *Global Setup* > *Company Setup* > *Global Policies* > *Employee Signature Uses* with the *If possible: use Biometric (mobile) signature* option is selected.
Employee has enabled e-signature within My Profile - Biometrics widget. Unchecked by default.

Custom Forms Wet Signature Support

WFR-171025: Users can now "wet sign" Custom Forms in cases where an actual written signature is required. A **Custom Forms** checkbox can be selected in the *Wet Signature* section of the *Signature Settings* widget (*Company Settings* > *Global Setup* > *Company Setup*) to enable this functionality.
NOTE: This functionality excludes Applicant Custom Forms.

Benefit Enrollment Wet Signature Support

WFR-193118: Users can now "wet sign" a Benefit Enrollment form in cases where an actual written signature is required. A **Benefit Enrollment** checkbox can be selected in the *Wet Signature* section of the *Signature Settings* widget (*Company Settings* > *Global Setup* > *Company Setup*) to enable this functionality.
Admins can configure Benefit Enrollment within the Signature Settings widget under *Company Settings* > *Company Setup* > *Global Policies*. Users can use Wet Signature to sign a Benefit Enrollment request (*Confirm & Submit* step and *Modify* step). If a user does not have permissions for MSS, the e-signature audit report will show the text **Benefit Enrollment** in the *Signature Details* column.

Broadcast Messaging/Twilio

WFR-183105: In this release, we are introducing messaging that allows managers and administrators to send messages to their employee en masse. A single message can be sent to employee at the same time using a one-time message or using a template that can be edited for each message.
This new messaging is named Broadcast Messaging and can be created and delivered through Email, Mailbox, Notifications, or SMS (which requires the download of the SMS with Twilio Marketplace App and an account with Twilio).

Broadcast Messaging Configuration

WFR-180315: Users can now turn the **Broadcast Messaging** functionality on or off from within the *Mail Settings* widget on the *Company Info* tab under *Company Settings* > *Global Setup* > *Company Setup*. This provides users with more control over whether or not clients can use this functionality.
You must save the setting, exit the application and when you return, a new *Broadcast Message Templates* menu option will be added under *Company Settings* > *Global Setup*.
In order to create a Broadcast Message, the manager/authorized user should navigate to *Team* > *My Team* > *Employee Information*. When one or more employee(s) is/are selected, the **Communicate** button on the top right is enabled for selection. The **Communicate** option is inactive until you select at least one employee in the Employee Information list.

Configure Template Broadcast Message (SMS)

WFR-180322, WFR-193978: Users can configure each notification to send out via email so they can easily add or update the configuration as needed so that the exact message they want to send is sent. A new Broadcast Message template (for SMS and Email) has been added in the system along with the desired tags under *Company Settings* > *Global Setup* > *Broadcast Message Templates*.

Error Message for Duplicate Template Name

WFR-194784: Users are provided with a clear message when attempting to name a Broadcast Message the same as an existing message template. When a user tries to save a Broadcast Message template named the same as an existing communication template or system notification template, an error displays.

Broadcast Messaging Template

WFR-180317: Users can access the Broadcast Messaging setup under *Company Settings > Global Setup > Broadcast Message Templates*.

Available Tags for Broadcast Message Templates

WFR-181939: When building out the content for an Email or SMS Broadcast Message, users can leverage established system tags to make message targeting easier.

Configure Template Broadcast Message (Email)

WFR-180321: Users can configure each notification to send out via a specific email address so they can easily add or update the configuration as needed so that the exact message they wish to send via email (which will be used for push notification as well) is sent.

Configure Template Broadcast Message (iCalendar Attachment)

WFR-192409: Users can configure each notification to send out via email so they can easily add or update the configuration so that the exact message they wish to send via email, including an iCalendar Attachment, is sent.

Reports Related to Broadcast Messaging

System Generated Email Report

WFR-169962, WFR-180332: Users can view the history of outgoing Email communications within their company for proper accounting using the System Generated Emails report under *My Info > My Reports > System Reports > System Utilities > System Generated Emails*. Users must have the **System Generated Emails** security item enabled in the *System Reports* section on the *Reports* tab of their assigned Security Profile to access this report.

System Generated SMS Report

WFR-169958: Users with the appropriate security settings can view the history of outgoing SMS communications within their company to allow for proper accounting. The System Generated SMS report is available under *My Info > My Reports > Marketplace Reports > Twilio > System Generated SMS*.
This report is only visible if the **SMS Integration with Twilio** Marketplace item is added to the company. In addition, users must have the **System Generated SMS Report** security item enabled in the *Marketplace Reports* section on the *Reports* tab in their assigned Security Profile under *Company Settings > Profiles/Policies > Security*.

User Generated SMS Report

WFR-181505: Users can view the history of responses to SMS Communications within their company for proper accounting using the User Generated SMS report under *My Info > My Reports > Marketplace Reports > Twilio > User Generated SMS Report*.
This report is only visible if the SMS Integration with Twilio Marketplace item is added to the company. In addition, users must have the **User Generated SMS Report** security item enabled in the *Marketplace Reports* section on the *Reports* tab of their assigned Security Profile to access this report.

Workflows Related to Broadcast Messaging

Two Way SMS Workflows – Required Comment

WFR-191044: Admins can configure a Workflow to allow for a SMS response to Approve or Reject, plus any required Comment, so that users can Approve/Reject a Workflow that includes a Comment and submit it via SMS. When the Workflows listed below are sent through SMS 2-Way, the user is notified that a Comment is required in addition to their Approve/Reject and unique code.

- Time Off Request
- Timesheet
- Timesheet Change Request
- Schedule
- Schedule Open Shift
- Schedule Request for Coverage
- Schedule Shift Swap
- Compensation Proposal Request

Feature Retirements

The tables included in the detailed Cross Product release notes under the Feature Retirements heading document functionality that has been retired or is planned to be retired. These tables are updated as needed with every system release.

Please see the detailed Cross Product release notes for October 2020 to review the tables.

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