PAYPRO
Workforce Management

Summary Release Notes

August 2021

R76

This document contains a summarized description of all enhancements for the release date / month shown above. It does not contain bug fixes. For more details on any listed enhancement, download the fully detailed release notes for the product line (HR, TLM, Scheduler, Payroll, Cross Product).

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R76 Summary Release Notes

This document contains summarized descriptions of enhancements for the specified release for all product lines. To view more details, refer to the regular detailed release notes for each product line (HR, TLM, Scheduler, Payroll, Cross Product).

Release Dates

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

- **EU Server:** August 9, 2021 at 11:00pm – 3:30am BST
- **POD 60:** August 10, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD2:** August 11, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD5:** August 18, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD4:** August 18, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD3:** August 19, 2021 at 11:30pm – 4:00am EDT
- **AUS Server:** August 19, 2021 at 12:00am – 4:30am AEST
- **U.S. Server POD6:** August 19, 2021 at 11:30pm – 4:00am EDT

Supported Operating Systems and Browsers

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

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

Platform	OS Version
Desktop	
Windows	10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

Browser	Version
Microsoft Edge	latest
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

Hot Features in This Release

🔥 New Online Documentation Help Experience

A new online documentation experience will now be available in the application. This experience is upgraded significantly from the previous help experience, and is accessible from the following places in the UKG Ready application:

- From the main (hamburger) menu, go to **My Info > Help > Online Documentation**.

Security Permissions

Users need these security permissions to access the documentation:

- Go to the **Modules** tab, and in the **Online Documentation** section, check the **Show Documentation** check box. This setting will activate the Online Documentation menu option under My Info > Help and will also activate the ability to search for documentation in the readyConnect panel.

Highlights and Features

After you open the new help site, you can open a main (hamburger) menu on the left side to see the full menu of Online Documentation. You can also select tiles on the documentation dashboard to drill down and access all documents. Click the logo in the top banner to return to the dashboard (home page). On the dashboard, click **How to use this Help** for tips and instructions on how to best use the Online Documentation and its Search. The new help site also provides the following:

- Updated user guides arranged in a fresh style for online viewing.
- Release notes are available from the Online Documentation site for the first time!
- You can download release notes and user guides in PDF format directly from the Online Documentation site! This includes release notes for past releases. If you need PDF copies, try downloading from the Online Documentation. It is easier than downloading from your usual application server download path (which is still an available option for you).
- The Search box in Online Documentation returns results from user guides and release notes, making it easier to find the information you need.

Improved Update Schedule

The new Online Documentation site will be updated with each release. The current release's release notes will be available with each system release. The affected user guides for that release will be updated one or two weeks after a system release. This schedule can vary according to the size of the release and your specific server update schedule.

Printing of Organization Charts

WFR-206721 & WFR-206724: Managers wishing to share their organization with various stakeholders, such as new employees or others internal or external to their organization can now configure the organization chart export based on recipient requirements. This enables managers to export and use only the required level of data for their recipients. This is located under My Info > My Company > Organization Chart. The export will generate a PDF and in large organizations and selections, a warning will display to let users know the current selections may be better viewed online than printed.

Performance/Succession Management

Updates have been made to the Succession planning piece of Performance Management. Succession Plans are accessed under Team > Talent > Succession Planning > Succession Plans.

Tree View Display Added

WFR-50544: Within Succession Plans, a tree view has been added which connects the key employee to their succession paths and shows the key employee’s potential successors. A new View Succession Plan Tree icon has been added to the Succession Plans report page. When selecting the icon, the tree view will open. From here, if a potential successor has been listed in the employee's succession plan, that successor, or successors, if more than one listed, will display in the tree view.

Mass Delete of Succession Plans

WFR-53431: One or more succession plans can be selected and deleted en masse by checking the affected plans and selecting the **Delete** button. Current plans and as well as history can be deleted. If deleting a history instance, it will remove it from the primary plan. If deleting a primary plan, the system will keep the history instance. A confirmation will display prior to deleting. You can also use the trashcan icon to delete an individual plan.

Info Icon and Description Added to Succession Plans

WFR-187697: An Info icon and description text has been added to the following places for succession planning. When hovering your mouse over the icon, the description included text included in the assigned succession profile will display. If no description is included in the succession profile, the icon will be grayed out.

Succession Chart Widget in Dashboards

WFR-248073, WFR-248071, WFR-248069: Within the mobile and web experience, the options in the chart type drop-down will now include options that historically were available in the classic view. These are: Employee History Graph, Metric History Chart, Metric Bar Chart, Talent Matrix Chart, and Metric Pie Chart.

Note: Drag and Drop & Custom Color choices will not be available on this new chart widget in .home

Dashboard Widgets

Social Media Widget

WFR-246682: Company Administrators can now utilize a new widget, **Social Media**, to embed content from their organization's presence on social media platforms such as Facebook, Instagram, LinkedIn, Twitter, and YouTube. The widget shows the social media content in a responsive experience based on the embedded content. For additional details and instructions on how to set up the **Social Media** widget and insert embedded content, please see the **Company Hub User Guide**.

Note: The Social Media widget is only available to be added to Company Hub tabs. End-users cannot edit the configuration of the widget nor can they add the widget to any type of tab.

Suite Experience

Compact Styling for Common Components

WFR-238130, WFR-223477: We've worked on certain areas of the application to make the pages more compact to allow more data to fit on the screen.

WFR-240164, WFR-240235, WFR-242231: Changes have been made to common components in the system to allow more data to fit on the screen so users can work more effectively, such as:

- Font Size Changes - The default font size is 14px, including the field label, field value, and button label.
- Icon Sizes have been reduced.
- Input fields height reduction.
- Button Height reduction.
- Tables with input fields - reduce the height of the input fields.
- Inline Filter Area of Reports.
- Effective Dated Changes
    - Padding has been reduced from underneath the **+Add** button for Effective Dated Fields in Cost Centers, Profiles, and Benefit Salary.

New Button that Triggers Attestation Workflow Without Punch

WFR-226126, WFR-239003, WFR-252536, WFR-251694: Previously, Attestation workflows could not be triggered without capturing a punch.

What's been added: For users who need Attestation workflows triggered for employees who do not punch in/out, such as salary/non-exempt employees, in compliance situations, or for employees who need to be paid for time taken answering wellness questions, a new **Attestation Only** section is now available in the **Prompt Settings** widget in the Attestation Profile. In addition, a Timesheet Button **Type** has been added, **Attestation Only**.

TLM Enhancements

This section provides a summary list of the enhancements for the next system release. In-depth explanations of these enhancements are available in the regular, detailed release notes.

Tip: For full details on any of the following enhancements, including screen shots, please see the detailed TLM Release Notes for August 2021.

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community.

Accruals

Accruals 1.0 & 2.0: Added Available Balance Field for InTouch Devices

WFR-233751: For all InTouch devices (DX, V2, V3), employees using the **View Accrual Balances** smartview can now view their **Available Balance** (the balance that can be used in that accrual period). The **Current Balance** (the total balance of all accrued hours in that category) is also an available option to view and has been available.

CMS

Only for United States: CMS is currently available for U.S. users only.

Added "Not Applicable" Status to CMS Pay Type Code

WFR-229086: In a previous release, a global setting was added to make the **CMS Pay Type Code** in the Employee Profile required to choose for employees, but there was no option to exclude employees from CMS Reporting.

What's been added: A **Not Applicable** option has been added to the **CMS Pay Type Code** drop-down. If this option is chosen, the employee will be excluded from the CMS export.

Imports

{UPDATE_LAST} Tag in Pay Prep Profile Import

WFR-228044: Previously, users received an Invalid Pay Prep Profile error when trying to utilize the **{UPDATE_LAST}** tag in the Pay Prep Profile import.

What's changed: You can now import Pay Prep profiles with multiple effective dated profiles for one employee with different or the same **[Effective From]** dates without receiving an error. The **{UPDATE_LAST}** tag will now work as expected.

Leave of Absence

Added Attach Document Settings to Upload Attachments in LOA Request

WFR-243451, WFR-244247, WFR-243498: Previously, employees were not able to be required to attach documentation during their leave request process.

What's changed: Two new settings have been added to the **Extra Settings** widget in the Leave of Absence Profile:

- **Employee Can Attach Document** (enabled by default)
- **Request Requires Attached Document** (disabled by default)

LOA Request Documents in Employee Documents Widget and Report

WFR-245723, WFR-245656, WFR-244660: When users upload a document to a Leave of Absence request and the request is approved, the attachment will now display under the document **Type** column, **Leave of Absence Case**, in the **Employee Documents** widget within the Employee Profile/My Profile, as well as the **Employee Documents** report (**HR > HR Maintenance > Employee Documents**).

Added Column with # of Attached Documents to Leave History for ESS & MSS

WFR-243822: From the **Leave Request History** report (MSS: **Team > Leave > History** / ESS: **My Time > Leave > History**), you can now add a new column, **Leave of Absence # Attached Documents**.

When this column is added to the **Leave Request History** report, a paperclip **Documents** icon with a red asterisk and the number of documents attached will display. When selected, a **Supporting Documents** pop-up will display the attached document for that specific leave request, and the manager or employee will have the option to view/delete the attachment.

Ability to Manage Docs via "# Documents Column" in Leave Cases Report

WFR-245314: Previously, items in the **# Documents** column in the leave **Cases** report (**Team > Leave > Cases**) were read-only.

What's changed: You can now manage documents in the **# Documents** column in the leave **Cases** report. A paperclip **Documents** icon with a red asterisk and the number of documents attached will display in this column. When selected, a **Supporting Documents** pop-up will show the attached document(s) for that specific leave case, and you have the ability to view or delete the document(s).

Upload Document when Approving/Rejecting LOA Request

WFR-243510: When managers are approving/rejecting leave of absence requests from their My To Do Items, a **View Documents** link will now display in the individual **Approve/Reject Leave of Absence Request**. When this link is selected, a **Supporting Documents** pop-up will display where the manager can upload and delete documents.

If a reason is configured to require at least one document to be attached to the employee's leave request, the trash can icon will be grayed out so that the manager will not be able to delete that required document.

Manually Adjust Entitlement Balance: Entitlement and Balances Report

WFR-243930: Users can now manually update employee LOA Entitlement and Taken balances via the **Entitlement and Balances** report under **Team > Leave > Balances**.

What's been added: For users with the **Modify Balances** Security Profile permission enabled in the **Leave of Absence Management** widget under the **HR** tab, an **Edit Balances** pencil icon will display in the **Entitlement and Balances** report. When selected, an **Edit Leave of Absences Balances** pop-up will open. Any data updated and saved from this pop-up will populate in the **Entitlement and Balances** report.

Added Custom Form Workflow for Leave of Absence for Non-HR Companies

WFR-246118: In the previous release, a Leave of Absence custom form option was added for non-HR companies, but a workflow was not available.

What's changed: The **Custom Form** option in the **Workflow Type** drop-down (under **Global Setup > Workflows**) is now available to choose for TLM-only companies (in addition to still being available if the HR module is enabled).

LOA Forms and Legal First Name

WFR-246638: For the following LOA forms (ESS and MSS):

- WH-380-E
- WH-380-F
- WH-381
- WH-382
- WH-384
- WH-385
- WH-385-V

Legal First Name, if specified, will be used instead of the existing **First Name** field. If the **Legal First Name** is not provided, the **Actual First Name** will be used in these forms.

Pay Calc 2.0

Holiday Eligibility v2 Exception Setting Did Not Work as Expected

WFR-247226: The **Holiday Eligibility (v2)** Pay Calc 2.0 rule now includes two new checkboxes. The new **Look for Last Scheduled Day** checkbox works with the existing **Not Have Exceptions Before Holiday** checkbox. The new **Look for Next Scheduled Day** checkbox works with the existing **Not Have Exceptions After Holiday** checkbox.

When you enable the **Look for Last Scheduled Day** checkbox or the **Look for Next Scheduled Day** checkbox, the Pay Calc rule searches for an exception on exactly the last or next (respectively) day in the period you selected.

Payroll Export

Payroll Export Format: Zellis Resourcelink Absence Changes

WFR-253045: Previously, if an employee had an absence during one week out of a multi-week pay period, the Payroll Export Format file for Zellis Resourcelink would display all the employee's pay period weeks, not the one week that the employee had an absence.
What's changed: For users with **Spell Of Absence** set in the **Pay Prep Result Records** section, the Payroll Export Format file for Zellis Resourcelink will now only export weeks that contain absences.

Payroll Export Format: Zellis Resourcelink Schedule Changes

WFR-245882: For Zellis Resourcelink Payroll Export Format users, a new field, **Pay Period Profiles Associated With This Payroll Export Format**, has been added to the **Payroll Export Format** widget so that you can choose a pay period profile list to define which pay period profiles can use this specific format.
In addition, previously users could not select different options from the **Field** drop-down in the **Columns** section of the **Layout** widget. Going forward, you can select an option from this drop-down that is applicable to the employee.

Payroll Metrics

Only for Australia: Payroll Metrics is currently available for Australian users only.

Payroll Metrics Employee Interface was Sending Wrong Data

WFR-253128: Previously, the HasHelp flag was being sent as **False** despite the employee not having a Tax Declaration created and the custom fields not being mapped from the **TFN Fields** section in the **Employee Upload Configuration** screen (**Integrations > Payroll AU > Employee Upload Config**).
Going forward, all **True**/**False** type fields from the **TFN Fields** section will not send anything if no custom fields are selected in the employee configuration.

Pay prep

Ability to Reorder and Add Time Prep Widgets in Business Process Steps

WFR-249488, WFR-250170: Previously, the steps and widgets in the new Time Prep screen could not be re-ordered, and new widgets/steps could not be added.
What's changed: Admins can now customize the business process steps and add new widgets from the new **Business Process Steps (Settings)** pop-up from **Company Information**. Select the gear icon in the **Business Process Steps** widget, then select the **Configure** button.
A **Business Process Configuration (Time)** pop-up will display where you can select the arrows next to the widgets to change the order. You can also delete or add widgets, add steps to the new widgets or existing widgets, as well as change the labels of the widgets.

Import Counters Pay Prep Excludes Data Beyond Termination Date

WFR-234082: When terminating employees, an export of all calculated counters up to the termination day is included in the payroll export, but for cumulative balances, the data was not cleared if the employee was terminated in the middle of a period. Any cumulative balances had to be manually calculated.
What's been added: A new setting (unchecked by default), **Exclude Data Beyond Termination Date**, has been added to the Pay Prep Profile Counter Records, within the **Counters Setup** window. When enabled, there will not be data beyond the employee's termination date in the **View Pay Prep Records Details** report.

Points

Added Custom Form Workflow for Points for Non-HR Companies

WFR-246118: Previously, a workflow for Points custom forms was not available for users in companies without HR enabled.
What's changed: The **Custom Form** option in the **Workflow Type** drop-down (under **Global Setup > Workflows**) is now available to choose for TLM-only companies (in addition to still being available if the HR module is enabled). When this

workflow type is chosen, a **Workflow Subtype** drop-down will display, and the option **Employee Custom Form** will display to select.

Public Webservice (REST/SOAP)

Migrated V1 Time Entry Notes to V2 and Made Public

WFR-231552: Users can now add time entry notes to timesheets via the Time Entry Notes V2 API.

Security

Ability to Approve/Reject TSCR without "View/Edit Timesheet" Enabled

WFR-224537: For managers who approve/reject employee timesheet change requests but not timesheets, the **View/Edit Timesheet** Security Profile setting still needed to be enabled because approving/rejecting a timesheet change request was previously considered an edit to the timesheet. This gave managers who should have only been able to approve/reject timesheet change requests access to timesheets.

What's changed: The **View/Edit Timesheet** option in the Security Profile under the **TLM** tab within the **Time Editing/Approving Functionality** widget is no longer required to be enabled in order for a manager to approve/reject timesheet change requests.

Timesheet

Added Employee ID Next to Name on Timesheet

WFR-243986: For both Timesheet Profiles, the Employee ID will now by default display next to the employee's name on their timesheet.

Added Enter Key to Keyboard Navigation

WFR-247820: In the timesheet, when you press the Enter key, the cursor will now by default move down a row the same way the down arrow key works.

Added Message for Zero Calc Hour Holidays

WFR-248812: On the **Calc Detail** page, the system now displays an alert message when an employee receives Raw hours from a Holiday Table but the employee receives zero calc hours because the Pay Calc Holiday Eligibility settings make the employee not eligible. The alert message says: **The calculated totals are zeroed by Holiday Eligibility rule.**

Added Option to Select Status for Timesheet Auto Submit

WFR-242710: Previously, for timesheets with Auto Submit enabled in the Timesheet Profile, there was no way to include/exclude certain employee statuses such as Not in Payroll, and managers were consequently seeing auto submitted timesheets for inactive employees.

What's been added: A new option has been added to the **Employee Policies** widget for both Timesheet Profiles, **Only Auto Submit Employees in Payroll**. When enabled, only timesheets of employees that are in payroll status will be automatically submitted.

Highlight Missing Punch

WFR-242993: For users who need to correct missing punches from the timesheet and would like an easier way to see missed punches, a new setting has been added to the **Punch Settings** section in the Timesheet Profile, **Highlight Missed Punch**.

When this setting is enabled (it is disabled by default) and a time entry has a missed punch based on the criteria set in the Timesheet Profile, the missed punch field in the timesheet will be highlighted in red.

Missed Punch Exception

WFR-242994: Managers are currently able to define missing punch criteria on the timesheet and can access the **Missing Punches** report, but exceptions could not be generated on the same criteria.

What's new: A new Pay Calculations 2.0 rule has been added, **Exception Based On Missed Punch**, which allows you to apply exceptions on shifts linked to missed employee punches. Triggering these exceptions does require the Pay Calc to be applied and/or the timesheet to be saved.

New Timesheet Now Accepts Decimal Input for From and To Fields

WFR-251982: The New Timesheet previously did not allow you to enter **From** and **To** times in a decimal format for Start/End timesheet profiles.

What's changed: If you enter a decimal in the timesheet **From** and **To** fields, the system will now accept the decimal and automatically convert it to the time format.

Option to Remove Automatic Blank Time Entry Line to Current Day

WFR-241264: You now have the option to disable a new blank time entry from being automatically added to the current day on the timesheet.

What's been added: A new setting (enabled by default) has been added, **Add Blank Time Entry Row to Current Day**, in the **Extra Settings** section of the Timesheet Profile. If disabled, a new blank time entry row **will not** be automatically added to the current day upon saving the timesheet. If enabled, when a user has the current day expanded on the timesheet and enters a time entry then saves, a new blank time entry will automatically be added.

Removed Deprecated Settings from Timesheet Profiles

WFR-210161: Now that there is only one timesheet view, the following settings do not apply to the new timesheet and have been removed from both Start/End and Bulk timesheet profiles:

- **Timesheet View**
- **Mobile View Enabled For**
- **Labels/Formats section**
- **Manager Change Cost Center On Mobile**
- **Show Employee Information checkbox**
- **Enable Keyboard Navigation (this is now on by default)**
- **Fixed Headers (headers are fixed by default)**
- **Status Look & Feel**

Timesheet Change Request: In/Out Date Fields in Modify Punch

WFR-239650: You can now give employees the option to select the date of the punch when they are submitting a **Modify Punch** change request.

What's been added: In the Timesheet Profile within the **Change Requests Employee Can Perform** widget, two new options have been added, **Modify Punch In With Date** and **Modify Punch Out With Date**. The option(s) enabled will display as a **Change Type** for employees to choose. The **In Date** / **Out Date** fields will display in the **Change Request** pop-up, which will allow employees who have a punch in and/or out that needs to go to another date to select that date in the **Modify Punch** change request.

Time Off

Time Off Calendar by Month: Added Supporting Documents

WFR-239417: From the **Time Off Calendar by Month** report (**Team > Time > Time Off > Reports > Time Off Calendar >Time Off Calendar by Month**), a paperclip **Documents** icon will now display in the pop-over for pending and approved time offs. When selected, a **Supporting Documents** pop-up will display where you can attach and review documents.

Time Off Calendar by Month: Added Dynamic Duration Icons

WFR-243807: Dynamic duration icons will now display next to pending time off requests on the **Time Off Calendar by Month** report.

Time Off Calendar by Month: Approve/Reject Time Off Actions in Popover

WFR-235677: Managers can now approve/reject from the pending time off request popover from the **Time Off Calendar by Month** report.

Time Off Calendar by Month: Changed Dotted Pending Request Bar

WFR-245047: Pending events in the **Time Off Calendar by Month** report Request Calendar previously contained a horizontal dotted bar at the bottom of the request.

What's changed: Going forward, on desktop, the dotted pending request bar will display as a vertical bar next to the request.

Time Off Request Calendar: Added Documents Icon to Time Offs in Calendar

WFR-220913: Previously, there was no way to quickly see if a time off contained a document attached without having to open the popover (or **Modify Time Off Request** pop-up) in the **Time Off Request** calendar.

What's changed: For pending and approved time offs, a non-selectable paperclip Documents icon will display next to the request in the **Time Off Request** calendar.

Time Off Request: Submit Time Off Request from Timesheet

WFR-243736: Previously, when users submitted a Time Off Request (not time entry based) from a timesheet, they had to switch to another page and then come back to the timesheet.

What's changed: Users can now submit a Time Off Request directly from the timesheet. For employees (with the **Request Time Off** permission enabled) and managers (with the **Request On Employee Behalf** permission enabled), a **Request Time Off** option is now available to choose from the three-dot ellipsis **More Actions** icon on the timesheet for both timesheet profiles. When this option is selected, the **Request Time Off** pop-up will display for users to enter details and submit the time off request.

Time Off Request: Added Comment Field in Modify Pop-Up

WFR-239214: Previously, managers could not review comments while approving time offs via the **Modify** link in their My To Do Items because there was not a comment field in the **Modify Time Off** pop-up.

What's been added: A **Comment** field (currently read-only) is now available in the **Modify Time Off** pop-up when you select the **Modify** link from your My To Do Items.

Time Off Request: Changed Pending Request Bar

WFR-236939: The time off pending request bar was previously a horizontal bar at the bottom of the request.

What's changed: Going forward, on desktop, the time off pending request bar will display as a vertical bar next to the request.

Time Off Request: Hide Approve/Reject if Manager is Not in WF Approve State

WFR-244881: Previously, the **Approve**/**Reject** buttons were displaying on the **Time Off Request** page and would error out (as well as the **All Open** report) due to the manager not yet being in the workflow stage that would allow them to approve/reject the request.

What's changed: If a manager is not in the stage of the workflow to approve/reject a time off request, the **Approve**/**Reject** buttons will not display for the manager.

Web Clock

Added Mobile Quick Punch/Web Clock Setting to Allow Badge Number Punch

WFR-241283: Previously, users could only punch on the .clock **Web Clock** page and with Mobile Quick Punch using a username and password. For many companies using SSO to log in, employees who did not know their credentials could not use the .clock **Web Clock** page or Mobile Quick Punch to punch in.

What's been added: Employees now have the option to punch through the Mobile Quick Punch and .clock Web Clock using their badge number instead of a username and password. Under **Global Setting > Company Setup**, a checkbox setting, **Allow Punch with Badge #**, has been added to both the **Web Clock** and **Mobile Quick Punch Preferences** widgets. Check this setting in one or both of these widgets (depending on what employees use to punch) to allow employees to quickly punch in using their badge number.

Workflows

Timesheet/TSCR Workflows: Option to Hide To Do Items in Approve/Reject

WFR-174917, WFR-246950, WFR-247447: A **Hide To Do** checkbox option was previously available only for override managers.

What's been added: The same **Hide To Do** checkbox option has been added to the **Approve/Reject** step of the Timesheet and Timesheet Change Request workflows, and is available for any groups that can be chosen from the **To Be Completed By** drop-down. When this setting is checked, any timesheet or timesheet change request to-do items will be hidden from the to-do bell counter.

In addition, a new filter, **Data With Hidden To Do Items**, is available to enable in the **Pending Timesheet Change Requests Approval** report (**Team > Time > Timesheets > Change Requests > Pending Timesheet Change Requests**) and **Pending Approval** report (**Team > Time > Overtime > Pending Approval**). If this filter setting is checked, the report will display to-do items that were hidden. If it is unchecked, the hidden to-do items will remain hidden from the report.

Scheduler Enhancements

This section provides a summary list of the enhancements for the next system release. In-depth explanations of these enhancements are available in the regular, detailed release notes.

Tip: For full details on any of the following enhancements, including screen shots, please see the detailed Scheduler Release Notes for August 2021.

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community.

Availability/Preferences

Availability Calendar Weekday Selector/Input Component/Preferences Button

WFR-237903, WFR-237904, WFR-237906: The following minor updates have been made to the **Availability/Preferences** calendar (under **Schedule > Team Setup > Availability/Preferences**):

- Checkboxes have been added next to the names of the weekdays so that managers and employees will know more readily that they can select the checkbox in order to select all the days for that specific weekday in the month.
- The browse and select for an employee's name was moved from underneath the **Availability/Preferences** header to next to the date.
- The gray bar at the top of the page has been removed.
- The **Existing Availability/Preferences** link was renamed to **View Existing**, and the button was moved to the top-right corner of the page.
- The **Availability/Preferences** pop-up window previously displayed in the middle of the page, and will now display in a panel to the right of the calendar.

Public Webservices

Migrated v1 APIs for Basic Schedules to v2 APIs

WFR-244253: The Basic Schedules APIs have been migrated to from v1 APIs to v2 APIs. All customers using Basic Schedules APIs need to update their integration to use the v2 API.

Shift Requests

Time Off Requests to Look at Work Schedule Profiles in Advanced Scheduler

WFR-207722: Previously, Advanced Scheduler employees could not request time off for a future date unless there was a posted schedule or the employee had defined working days in their Availability.

What's changed: The Advanced Scheduler engine will now look at an employee's Work Schedule Profile to see what days the employee would have been scheduled at that future time they were requesting time off so that the system will know when to apply time off and when to skip.

Schedules

Added Rule to Create Open Shifts and Allow Shifts to Remain Assigned for TO

WFR-232797: Underneath the setting, **Remove Employees From Scheduled Shifts On Days That Have Been Approved For Time Off**, in the **Time Off Policies** widget (**Global Setup > Company Setup > Global Policies**), a new setting has been added, **Keep Shifts Assigned To Employees And Create New Open Shifts On Days That Have Been Approved For Time Off**.

When enabled, an open shift will be created when an employee is scheduled to work on a day that they later get an approved time off for, and the existing shift will remain assigned to the employee so that the employee will receive extra pay/shift premium (depending on what their scheduled time was).

HR Enhancements

This section provides a summary list of the enhancements for the next system release. In-depth explanations of these enhancements are available in the regular, detailed release notes.

Tip: For full details on any of the following enhancements, including screen shots, please see the detailed HR Release Notes for August 2021.

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community.

Employee Pay Information API Updated with Pay Grade Info

WFR-247932: The Employee Pay Information API (v2) has been updated to include data for Pay Grade Parent ID, Pay Grade Parent Code, and Pay Grade Parent Name.

Benefits

Adding Beneficiaries in Auto-Enrollment Benefit Plan Change Requests

WFR-245202: For companies with configured benefit plans that are part of an auto-enrollment profile and are also configured to accept beneficiaries and/or dependents, users with proper access can now use the **Modify** step in the auto-enrollment workflow and add, remove, or modify dependents and beneficiaries in plans configured with these elements. New dependent/beneficiary contacts to use in this process cannot be added during this process.

Overriding Deduction Dates in Benefit Plans

WFR-196332: A new **Override Deduction Dates** checkbox has been added to the pop-up when adding benefit plans to employees. When checked, you can then override the deduction effective dates for one or all of the deductions listed. The checkbox is also available when editing deduction effective dates for an existing benefit plan.

Checklists

Inline Error Message When Deleting 'In Use' Checklist

WFR-205501: When attempting to delete a checklist under Settings > HR Setup > Checklist and that checklist is in use, an inline error message will be generated, stating "You are unable to delete this checklist because it is assigned to a user."

Company Settings

Account Contacts: Phone Default Added

WFR-246995, WFR-249003, WFR-247015, WFR-230310, WFR-246442: Previously, when adding a new account contact for an employee, the primary phone of the contact defaulted to the Home phone. As we did with the employee phone default, we have now added an option to default the Account Contact phone to either Work Phone, Home Phone or Cell Phone from the **Default Primary Phone** drop-down. This is configured in the **Account Contacts** widget under **Settings > Global Setup > Company Setup**. For backwards compatibility, the Default Primary Phone will automatically be set to Home Phone.

Custom Forms

View Button Added for Multi-Page Viewing

WFR-85975: A **View** button has been added to the **Custom Form** page. When selecting one or more pages from the **Pages** widget, the **View** button can be selected. When selecting multiple pages and selecting **View**, navigation arrows will display under the **Form Page** heading allowing you to scroll back and forth between the selected pages. You will be able to view, edit, add fields, and save each page between scrolling.

Everything Benefits & eBN

Support of Legal First Name

WFR-246779 & WFR-246778: In the June release, we introduced a new Legal First Name field to employee profiles. We have extended this functionality to include the eBN and Everything Benefits integrations. For compliance purposes, if an employee profile contains a Legal First Name, it will be used in lieu of the name listed in the First Name field.

Note: This field currently displays for all companies except those who also have the Payroll sub-system enabled. We explained in the June release that this field will be available to Payroll companies in a future release. As of this release, that work is still pending.

Forms

EEO-1 Forms Preserve Settings in Pop-Up

WFR-232370: In the **EEO-1 Populate Form** pop-up, when setting the filters needed to generate the form, the system will now save the settings so they will be available for subsequent population of the form. Previously, the settings would be cleared and users were required to enter the information for each subsequent use. The form is located under Team > HR > Forms > Government Forms > EEO-1.

EEO-1 Mass Add & Populate

WFR-232371 & WFR-239367: Users can now mass add EEO-1 forms by using the **Mass Add & Populate** button. When selecting this option, you will be presented with multiple steps to guide you through the process.

- **Select EEO-1 Type**: Select Component 1 or Component 1 & 2, and select Employer Report (single or multi establishment)
- **Generate Form Based on**: EINS or Cost Centers. If EINs, select which EINS are impacted. If Cost Centers, select cost center tree.
- **Workforce Snapshot**: Set dates for the time period (select dates between October 1 and December 31 of preceding year), optionally include synced employees, additional cost centers, account status, and employee type.

EEO-1 Mass Edit

WFR-232373: An **Edit** option has been added under the ellipsis of the EEO-1 report page. When selecting one or more forms, this button will allow common changes to be applied to multiple forms at the same time.

- All selected forms must have the same type; either Component 1 or Component 1 & 2.
- A form with blank fields will display for editing.
- Fields that are editable in a single form will be editable with mass edit. (Section D is not editable in single or mass)
- Clearing of fields not allowed.
- Not available in mass edit are: Download PDF, Electronic File, and Populate Form.
- Upon Save, any edited fields will be applied to all selected forms. If a field is left blank, the corresponding field in each of the selected forms remains with its previous value.

EEO-1 Mass Delete

WFR-232374: Users will now have the ability to mass delete EEO-1 forms by selecting multiple forms and then selecting the **Delete** option under the ellipses of the report page.

- A confirmation pop-up will display prior to deletion.
- If a form is in Pending status, a message will display indicating that forms with this status cannot be deleted.

EEO-1 Report Page Columns Added

WFR-239411: New columns can be added to the main EEO-1 report page which will display details about forms created using the **Mass Add & Populate** option. The data in the columns will not display for existing forms or single, manually created forms. The columns are:

- **Population Status**: Will show new forms with statuses of: Pending, Populated, and Failed.
- **Generated For**: Displays the EIN(s) and/or any cost centers associated with the selected EIN(s) for which the form was generated.
- **Snapshot From**: Date From and time stamp of the generated form. Dates are generated according to user's Locale settings.
- **Snapshot To**: Date To and time stamp of the generated form. Dates are generated according to user's Locale settings.

HR Actions

Employee Lookup Page Updated

WFR-208773: When navigating to Team > HR > HR Actions and selecting employees for HR Actions including the Performance Review Profile and/or Succession Profile pages, the employee lookups have been updated to the newer single lookup common throughout the application.

Imports

Incident Import: Incident Date Color Update when Not Required

WFR-245577: Previously, when importing employee Incidents, Incident Date was always required as part of the import but not required in the application. Because we added a requirement checkbox for Incident Dates in the June release, the requirement will be determined by validation of this field. Because of this, the column heading for Incident Date in the Template tab will now show as black and not red (required).

Position Management

Employee Assignments Report: Salary Column Date

WFR-240922: The **Salary** column of the Position Management **Employee Assignments** report will now update according to the **As of Date** set in the report. Previously, the salary data populated in this column showed the salary as of Today instead of the date selected.

Terminating a Manager with Direct Reports

WFR-225520: When terminating a manager who is set as a **Directly Reports to Manager** type, with one or more direct reports, the termination process will now provide an opportunity to assign another manager in the same position. A pop-up will display allowing you to replace, ignore, or simply proceed with removing the manager. A **View** hyperlink can be selected to view the manager's employees.

Reports

Employee Assignments Report: New Columns Added

WFR-229796 & WFR-229791: New columns have been added to the Employee Assignments report page used with Position Management. These are not default columns and must be added.

- Employee: Benefit Salary 1-5 (the amounts displayed will be as of the date selected for the report)
- Demographics: Is Veteran
- Demographics: Is Recently Separated Veteran
- Demographics: Is Disabled Veteran
- Demographics: Is Armed Forces Service Medal Veteran
- Demographics: Is Active Wartime Or Campaign Badge Veteran
- Employee: Type
- Job Attribute: Those defined by customer
- Demographics: Ethnicity
- Demographics: Disability

Employee Contracts Report: Page Level Actions

WFR-239821: Previously, users had to manually select individual employee contracts in order to delete them.
What's been added: A row to mass select contracts is now available on the **Employee Contracts** report under **Team > HR > Reports > HR Maintenance > Employee Contracts**. This allows users to quickly delete multiple employee contracts.

Recruitment - General

Forgotten Passwords: Applicant Forgotten Password Configuration Options

WFR-245404: Applicants who forget their passwords will now be able to see and answer their security question for validation of the password reset. When the applicant clicks on Forgot Password and they enter their username on the Reset Password page, the system will present them with their security question and a field to answer (providing a security question was set). If a security question is not set, the applicant will still be able to continue with the forgot password process.
WFR-186939: Admins can now enable/disable the forgotten password options for applicants. This widget was previously named **Forgotten Username Preferences** and only contained options for forgotten usernames. This widget is located on the **Applicant Tracking/Recruitment Configuration** page under **Settings > HR Setup > Applicant Tracking/Recruitment/Configuration**.
It has now been renamed to **Forgotten Username/Password Preferences** and can be set to allow applicants the ability to reset their forgotten passwords and well as their usernames. Upon validation of a password reset request, applicants are sent a pre-configured password reset notification.

- Within the widget, a **Notification** hyperlink can be selected which will open the maintenance page where you can view and/or edit the notification. A default **Applicant Password Reset** notification will be sent to the user if a custom notification hasn't been configured.

When checking the **If Account Security Question Is Not Set, Require On Login** is checked, applicants who do not have a security question already configured, will be presented with a **Set Up Security Question** screen which must be filled out before the applicant can proceed.

Passwords: Validation and Error Handling

WFR-184559 & WFR-245296: We have updated password validation for employees and former employees applying for a job through the career portal.
The system will check and validate users based on the Username. Based on their response, if the system cannot validate the user as a single account for a non-active employee, the system will not allow the user to proceed and will give errors based on the use case when the validation failed. Users' email and phone will be partially masked.

Forgotten Password Flow - No Security Question on File

WFR-175817: When an applicant selects **Forgot Password**, they will get a screen containing a **Reset Password** option, **Username**, **Continue** and **Back To Account Login** button.

Job Requisition Configuration: Display/Required Fields Added

WFR-246100, WFR-231906, WFR-231907: Within the **Job Requisition Configuration** widget of Recruitment Configuration, located under Settings > HR Setup > Applicant Tracking/Recruitment > Configuration, updates have been made to allow you to display or hide certain job requisition fields and mark certain fields as Required. Having this ability will allow companies to hide fields that may not apply in certain countries or companies. These options also apply to templates.
When saved in Configuration and then creating, viewing, or editing a Job Requisition or Job Requisition template, those options not marked as Display will not show in the Job Requisition or Job Requisition Template. For backwards compatibility, all fields will be marked as Display by default. For those options marked as Display, they may also be marked as Required to contain an entry upon saving the requisition or requisition template. Job Requisitions are created under Team > Recruitment > Job Requisitions.

Note: Display visibility options in certain sections within the Job Requisition Configuration widget will be updated in a future release. These are: **Visibility Dates**, **Cost Centers**, and **Hiring Managers**. Certain fields cannot be disabled for Display settings as they may be necessary for items such as integrations with job boards.

Applicant Communication Templates: Description/Subject Updated

WFR-214198: In the **Applicant Communications** page, the **Description** column heading name has been changed to **Subject** to better reflect that this column will display the text from the **Subject** line of the email message, and not the text from the message body. This is accessed from the applicant's record (Team > Recruitment > Candidates > Applicants, select View Applicant) and selecting the Communications tab. The column is in the Applicant Communications widget of that page.

Recruitment - Workspace

Job Requisitions: Links Added to Application Header Counts

WFR-253403: In the header of Job Requisitions where **New Applications** and **Total Applications** shows a number totaling each category, those numbers will now be hyperlinked. When the hyperlinked numbers are selected, it will jump you to the **Applications** tab where you can quickly view and process your job applications.

Offer Letters: Added to Workspace

WFR-227090: Offer letters can now be accessed from the job requisition workspace via a new **Add Offer** button. This is available in the **Quick Actions** panel when opening/viewing a job application from the **Applications** tab of the workspace. When selecting the button, the offer letter page will open where you can create, preview, save and submit your letter, as well as download the PDF and send the offer to applicants.

- Upon **Save** of the offer letter, options to **Preview**, **Save** and **Submit** will remain in place until submitted.
- Once saved, or submitted, the **Add Offer** button will convert to **View Offer** in the **Quick Actions** panel.
- Once submitted, options of **Download Offer** and **Send Offer** will become available within the Offer Letter page.
- From the Offer Letter page, the **Send Offer** button will open a communication pop-up where you can send an email and/or SMS (if set up) to the applicant. A PDF of the offer letter will be attached to the communication. When the applicant receives the communication, they can open the PDF and view their offer.

Offer Letters: Custom Fields Configuration Now Available

WFR-246503: A new menu option has been added that allows you to create custom fields for Offer Letters. The option is located under **Settings > HR Setup > Applicant Tracking/Recruitment > Custom Fields > Offer Letter Custom Fields**. The configuration process is the same as creating custom fields for applicants or job requisitions. Once created, the custom fields will be available in the offer letter (not available in offer letter templates), however the custom fields will be available in the **Add Tags** list when creating an Offer Letter or Offer Letter Templates.

- A new **Offer Letter Custom Fields** security option to give users permission to create these custom fields is available under the HR tab of security profiles in Recruitment section. Options are View, View/Edit, and Add. Users must at least have View to see the option in their menus.

SSNVS

SSNVS Button Added to Employee Profiles

WFR-251732: In the June system release, we added back the **Social Security # Verification** button in the hire page accessed from Employee Information. In this release, we are adding the button to the Employee Profiles, which will allow verifications to be performed on existing employees. From the Employee Information report page, open one or more employee profiles for viewing and the button will be visible at the top.

Workflows

HR Action Request Workflow: Notes Tag Added to Generate Notification Step

WFR-231947 & WFR-248278: In the **Generate Notification** step of an HR Action Request workflow, a **Notes** tag has been added to the list of emails tags. This tag can be added to the **Message** section. Including this Notes tag in a notification will conveniently collect all notes added for the workflow up to the point the Generate Notification step is processed.

- It will include the same information displayed when selecting the Notes icon, including the person who added the note along with the date/time the note was added.
- When adding the Notes tag in the Message section of the Generate Notification step, the tag will be replaced with the actual text from the notes collected.

Payroll Enhancements

This section provides a summary list of the enhancements for the next system release. In-depth explanations of these enhancements are available in the regular, detailed release notes.

Tip: For full details on any of the following enhancements, including screen shots, please see the detailed Payroll Release Notes for August 2021.

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community.

American Rescue Plan Act Updates

WFR-231706, WFR-243535: The system is updated with the following changes related to FFCRA and ARPA legislation:

- New ARPA earning codes are available for the updated taxation.
- The system calculates the OASDI tax credit as specified in the new legislation.
- Tax vendor files have been updated or will be updated soon.
- Wage limits have been updated or reset.

The 2nd Quarter Form 941 and instructions were finalized by the IRS on June 25, 2021. The system is now updated to calculate payrolls based on these IRS updates. If you paid an employee FFCRA wages on or after April 1, 2021, you must take action to move those 2nd Quarter wages to ARPA earnings codes.

BSI Tax Files Report Column Added

WFR-247257: The **BSI Tax Files** report now includes an optional **Company EIN Names** column that users can add to their report view to more easily see the EIN for which each report was created.

Ceridian XML Update

WFR-250124: The system now includes Ceridian's XML file specification update Version 2021.2.0.

DE-4 Form Update for California

WFR-239463: The system now includes the new version of California withholding form DE-4.

Economic Aid Act Changes to Cash Compensation

WFR-241916: Prior to the U.S. Economic Aid Act, forgivable cash compensation included in payroll costs for employees (other than owner-employees) was capped at $15,385 per employee if the borrower used an 8-week covered period, or capped at $46,154 if the borrower used a 24-week covered period. The amounts equaled $100,000 divided by 52 and multiplied by 8 or 24, as applicable, rounded to the nearest dollar.

The Economic Aid Act retroactively provided borrowers with the ability to use any period between 8 and 24 weeks. The per-employee cap on cash compensation now requires borrowers to determine the cap based on the covered period selected by the borrower. For example, if a borrower uses a 20-week covered period, the cap on cash compensation must be $38,462 ($100,000 divided by 52 multiplied by 20).

Now, in the system, when users select a **Period for Date Range**, the system includes a new option named **Loan Forgiveness between 8 and 24 weeks**. When users select this option, the system will calculate the number of weeks in the Date Range and use that number for the $100,000 pro-rated cap.

Note: If the number of weeks in the Date Range is less than 8, the system will use 8 weeks for the cap. If the number of weeks in the Date Range is greater than 24, the systems will use 24 weeks for the cap.

Intuit W2 Marketplace Product

WFR-246757, WFR-246759: In companies that have the **Intuit W2** marketplace product enabled but have the **Payroll Direct** option disabled, and in companies that do not have the **Intuit W2** marketplace product enabled, the **Year End Process** page does not display the **Send Intuit W2 File** section and the **Enable TurboTax W-2 Import** button.

MasterTax Export Progress Indicator

WFR-175989: The system now includes an improved progress indicator for MasterTax file exports. When users export a MasterTax file, the system displays a **Processing** box so that users can see the percentage complete while the export is processing.

MasterTax Oregon State Income Tax

WFR-154155: In MasterTax PTS files, when an employee has Oregon State Income Tax withheld and has a retirement plan with the **Mark W2 Pension Box** set to **Yes**, the system now populates a **Y** in the **Reference Ein** field for row 210 of **OR0000-001**.

MasterTax Uncollected Tips

WFR-24282: The system is updated to report uncollected Social Security and Medicare related to GTL and Tips in MasterTax RTS and PTS files.

The total uncollected Social Security and Medicare related to GTL appears in **FE0000-124 Federal - Employer Uncollected Group Term Life**.

The total uncollected Social Security and Medicare related to Tips appears in **FE0000-123 Federal - Employer Uncollected Tips**.

TCC WOTC Updates

WFR-201796: The system now includes a **Pay Check Date** for employees in the TCC WOTC Payroll file.

W-4 Form Update for Oregon

WFR-241713: The system now includes the new version of Oregon withholding form OR-W-4.

Cross Product Enhancements

This section provides a summary list of the enhancements for the next system release. In-depth explanations of these enhancements are available in the regular, detailed release notes.

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

Affordable Care Act (ACA)

New Line 17 on Form 1095-C Added to ACA Reports

WFR-203293: The IRS introduced a new Line 17, **Zip Code**, within Part II of the 2020 Form 1095-C. This field is different than the two zip code fields in Part I as this does not have to do with the employee or the employer address, but with affordability. We added this new line to the ACA Timeline, and now we have also added it to the following ACA related reports:

- ACA Data Detailed
- ACA Audit Trail

This allows users to pull all Lines from the Form 1095-C for their employees in the same reports so they can see all of the details at the same time rather than having to go into each individual's ACA Timeline.

A new available column, **1095-C Line 17 Zip Code**, has been added to the ACA Data Detailed Report found under **Benefits > ACA > ACA Data Detailed Report**. This column is not included by default, but it can be saved into a view by a user and is included in the exported data if a user exports the report.

Legal First Name on Form 1095-C

WFR-229271: The Legal First Name now displays on Form 1095-C if a Legal First Name is present, otherwise the First Name displays. This is applicable for the Form 1095-C, Print form and ACA Year End Processing (all three filings). The following logic applies:

1. When populating the first name of the employee in the Employee Form 1095-C, Box 1, Employee Form 1095-C Box 18, Part (a), and the CA and DC AIR files:
    - If Legal First Name is blank, populate First Name.
    - If Legal First Name exists, populate using Legal First Name.
2. In the Employee Form 1095-C Mailing Address, when the printing options **Use Form Printing On Pressure Seal Paper** or when **Use Form Printing On Letter Paper** and **Employee Name and Address on Separate Page** are selected, the First Name displays/is printed and not the Legal First Name, whether the Legal First Name is null or not.

ACA Timeline History Report

WFR-250073: The system is updated to include a new Marketplace Report titled ACA Timeline History (**Reports > Marketplace Reports > ACA Timeline History**). This report can be viewed and downloaded to see historical ACA Timeline data from 2012 to 2017.

Cost Centers

Unable to Select "All" or "Only" options for a Parent Cost Center

WFR-244726: Previously, when users wanted to select a parent cost center and all items underneath the parent cost center, they could not toggle the **All** or **Only** options; they had to instead expand the cost center list in order for the **All** or **Only** options to be available to select.

Going forward, when selecting the parent cost center, users will be able to select **All** or **Only** without having to expand the list.

Payroll Taxation and Geo-Fencing No Longer Share CC Priority Field

WFR-231883: Previously, if geo-fencing was set up based on a user's location that was also their tax location, priorities could not be separated due to the **Priority** field being shared between geo-fencing and Payroll taxation.

What's been added: In the **Cost Center Tree**, a **Geo-Fencing Priority** drop-down field has been added beneath the **Priority** drop-down field so that you have the option to distinguish which cost centers (geo-fencing (location) or priority (taxation)) are the higher/lower priorities.

Dashboards - General

New UI Dashboard - Links Widget (Quick Links)

WFR-245171: Story: Users are now able to see Open Links from the Links Widget (Quick Links tab) in a new tab using right click. For users with access to the [New] UI Dashboard, where the Links widget is added to the Dashboard with at least one configured link in the Quick Links tab, when they right click on any Quick Link > Open Link, the respective link opens in a new tab.

Progress Bar on Save in Dashboard Layout Profile and Dashboard Tab Library

WFR-241956: Admins now see a progress bar upon clicking **Save** in the Dashboard Layout Configuration and Dashboard Tab pages, so they can understand how long the process will take. For the Dashboard Layout Profile saving, the title for the progress bar shows **Saving** and a message reads **Saving of layout is in progress**. For the Dashboard tab saving, the title shows **Saving** and the message **Saving of tab is in progress** displays.

Resetting Dashboard Layout via Security Profile Improvements

WFR-210585: Admins now receive confirmation and success messages when resetting Dashboard Layout Profiles via Security Profiles, helping them identify how many accounts were impacted. For both client company level security profiles and the admin level Mass Edit Security Profiles screen, the existing button label next to the Dashboard Layout Profile field has been updated from [Reset] to **[Publish]**.

Inline Messages for Empty Dashboard Layouts

WFR-254134: Admins can access the **Add** option from the Dashboard Tab Library pop-up, so they can now add tabs to an empty layout. When an admin accesses a Dashboard Layout without any tabs, the system displays the following informational message: **You can insert one or more tabs to this empty layout. Edit Tabs**. When an admin clicks on the **Edit Tabs** button or the **Edit Tabs** hyperlink in the message, an appropriate pop-up appears with the message **No data to display**.

Dashboard Tab Library

Updated Profiles Pop-Up in the Dashboard Tab Library

WFR-238438: Users can now view how many profiles are associated with a Dashboard tab so they can track its usage. The system shows the list of Profiles and the Layouts where a tab has been assigned.

The Profiles column is primarily sorted in alphabetical order by default, then by a second level of sorting by the Effective From date, from oldest to most recent.

Unassign Action for Dashboard Tab Library

WFR-226480: Users can now unassign tabs from Dashboard Layout Profiles/Layouts so they can delete tabs that are no longer relevant. The **Unassign** page level action has been added to the Dashboard Tab Library report (**Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library**) as a drop-down option under the **Assign** action.

Save As Option for Dashboard Tabs

WFR-227535: Admins can now save a copy of a tab so they can reuse the existing content of a tab and don't have to create a new one. When a user selects the appropriate tab and opens the View/Edit tab page, a **Save** button with a drop-down displays. Upon clicking the drop-down, users will see the option to **Save As**.

The **Save As** button is not available until an admin makes some changes to the tab as the **Save** button is disabled.

Improvements to Assign to Profiles Lookup

WFR-237494: Admins can assign/unassign previously selected tabs to/from Dashboard Layout Profiles/Layouts via one lookup so they don't have to leave the page to perform the unassign action.

Messaging for Publish Changes Option

WFR-247443: Admin can now see more relevant messages when working with the Dashboard Layouts and tabs so they can understand the actual status of the items.

Preview of Widgets Available on Company Hub Tab

WFR-243670: Admins can now preview widgets on Company Hub and Custom tabs so they can see how a tab will look for end users during configuration. In **Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles or Dashboard Tabs Library**, when an admin disables the Edit Mode for a tab, the system shows the content for the following widgets:

- Announcements
- Links
- Content Widget
- Start
- Turtles
- Websites
- Documents
- Events
- Social Media

Add New Button on Dashboard Tab Library

WFR-248966: Users with View and Edit permissions for the Dashboard Layout Profile can now add new tabs using the **Add New** option under **Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library**. **Clone** and **Save As** options are also available.

Manager Tab Template

WFR-245190: Admins can now create predefined tab templates for managers so they can be reused. When clicking on **Add New** at the top of the Dashboard Tab Library report, the system shows the Add New Tab pop-up where a user can select the Custom Tab type and define it as a template via the **Template** drop-down. Choices for the **Template** field are:

- Empty (by default)
- Manager

Dashboard Widgets

ESS View of Leave of Absence Balances: Widget and My Profile

WFR-241265, WFR-241262: Employees can now view their entitlement balances and expiration dates from their dashboard via the new **My Leave Of Absence Balances** widget.

Google Sheets Widget

WFR-201049: Users can now place a Google Sheets widget into a Dashboard. Administrators can configure the widget via a Dashboard Layout Profile layout tab, and end-users can edit the configuration from a Dashboard tab. Users can click on the Widget Title, which opens a new tab to display a spreadsheet in Google Doc sheets.

When access to a Google Sheet spreadsheet has not been shared across users, the spreadsheet will not appear in the widget. Instead, a default browser message displays (for example, **accounts.google.com refused to connect**).

Note: This widget is only available for companies enabled to use the **Google Cloud** functionality.

Links Widget/Quick Links Pre-Configuration for Template Tab

WFR-246556: Managers can now see a pre-configured Links Widget (Quick Links tab) in the Template tab of the Dashboard Tab Library. A preserved Links widget in the Manager Tab Template includes pre-configured Quick Links.

Turtles Widget Renamed and Updated

WFR-250702: The name of the Turtles widget has been updated to **Fun** in both Admin and client companies in the Dashboards. This new name is reflected in the Add Widget pop-up, Rearrange pop-up, and in the Widget. The Allowed Widget permissions in security profiles have also been updated to **Fun (New UI)**.

WFR-218229: Users can now configure a Fun widget, which includes two animal types; Buffalo and Turtles Widget. The **Show Turtles Widget** option has been removed, and if users do not want to see the Fun widget (which is enabled where the **Show Turtles Widget** option was on), the tile can be removed from the Dashboard.

WFR-142209: Users can now view and interact with the new **Fun** widget, which includes two animal types: Buffalo and Turtles. For the new animal type, Buffalo, the following apply:

- Buffalos are shown from a top-down perspective, the same as turtles.
- Buffalos move in a realistic pattern, where they stop and walk on a certain frequency.
- Buffalos can move their head and ears.
- The same food as for Turtles is used.
    - Buffalos move towards food when it is created via left-click/press.

Employee Profile

One Column Default Employee Profile Layout

WFR-214646: The default layout for the Employee Profile has been updated to the Edit Tabs layout (**Company Settings > Profiles/Policies > Security > Screen Layouts**). The **On Entry Show** section has been removed, and a new checkbox, **Show Profiles Panel**, has been added.

The profile has been changed to one column that the widgets can be added to. Column 1 widgets are listed at the top, followed by column 2 and column 3 widgets. Users can reorder the widgets however they like. The following widgets have been removed as options from this page:

- Notes
- Background Checks

Imports

Assign/Switch Primary EIN through Employee Import

WFR-224468: Previously, an employee's Primary EIN could not be changed with the employee import and had to be done manually through the Employee Profile.

What's changed: A new column, **Primary EIN**, has been added to the Employee Import. This non-required column allows users to identify the Primary EIN for an employee and provides a seamless switch of an EIN/Company if needed. Enter a **Y** in this column next to the EIN name that is the new Primary EIN.

Marketplace Features

My Learning Classic (Knowledge Pass) Link Retired

WFR-252759: The end-user navigation link to **My Learning (Classic)** under **My Info > Help > My Learning (Classic)** has been retired and is no longer available to users.

Mobile Application

Back Button in Breadcrumbs

WFR-183868: Within the Mobile Application, the Back button has been moved down to the breadcrumb level, similar to how it displays in the Desktop version. In the Mobile App, the Back button is now placed in front of the breadcrumbs.

Personalized Experience

Today's Tasks: Employee Anniversary and Birthday Custom Permission

WFR-215143: Administrators can now restrict access to employees' start year so that only allowed users can see it. Custom permissions should be enabled so the appropriate Today's Tasks display for users.

Select Today's Tasks by Dashboard Profile

WFR-240047: Administrators can now choose which Today's Tasks will be enabled for a particular group of users. A new Today's Tasks lookup has been added to **Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles > Edit**, and the lookup displays when the **Show Today's Tasks** toggle is enabled.

The lookup contains a list of all Today's Tasks available for that company. and if Today's Tasks are currently on, all Today's Tasks are selected by default. Users can select/de-select Today's Tasks to configure which tasks should display for users assigned to the Dashboard Layout Profile.

Reports

Report Icon in Week Summary Column

WFR-248986: The numbers of events for a week has been replaced with report icons for Monthly, Weekly, and Yearly views. If there is more data in this column but there is no space, a counter (+2, +5, etc.) displays in front of the report icon . It's one click-able area that opens a report view for the week. When there is no data in the week, the report icon is disabled.

Run Report Behavior

WFR-246991: When reports tied to My Reports are setup so that they don't have the **Run Immediately** setting unchecked, the report only executes after the **Run Report** button is clicked. This change has been applied to all reports with the **Run Immediately** setting unchecked, not only for My Prepared Reports.

Security

Read Only Access Option within Security Profiles

WFR-172758: A new option, **Read Only Access**, has been added as a checkbox at the top of the Security Items widget in security profiles that works similar to the **Full Access** checkbox. This is available when accessing a security profile through either a client or admin company.

When **View Only Access** is selected, all options on all tabs become disabled (View Only) so that settings cannot be changed. This new option can be used to enable only those Security Items with a dedicated **View** setting.

Suite Experience and Platform Improvements

Company Settings Icon in Hamburger Menu Updated

WFR-250671: The Gear icon in the hamburger menu has been updated so the hover text now shows **Admin** instead of Company Settings or Settings.

System Theme Support

WFR-229181, etc.: Areas throughout the system are updated according to the System Theme that is selected, such as:

- The main body of Workspace pages.
- All areas where the Upload Files/Supporting Documents is used.
- My Checklists Tab (Mailbox and Dashboard Widget)
- My Notifications Tab
- Hamburger Menu, Employee Icon, Search Results
- My To Do Items
- AIMEE Tab (in Advanced People Analytics)
- Re-arrange Tiles - All colors in the **Rearrange Tiles** panel match the Theme colors called Tertiary1.

System Theme Selection Preview

WFR-242084: A new button, **Preview Colors**, next to the Theme selector drop-down, has been added to the System Themes Look and Feel widget and allows users to see a preview of the selected System Theme.

The preview mode opens in a new tab, and the user can go anywhere within the application with the previewed theme selected. The preview mode is only available during the current session for current user.

Breadcrumb Truncation Logic

WFR-232144: When space does not allow full visibility of the last level in the menu path, the breadcrumb is truncated at the first level. When space is limited, the breadcrumb is displayed only for the first and last levels. When space is available, the breadcrumb is displayed in full.

Delete Action in the Manage Existing Charts Panel

WFR-224411: A Chart is now deleted when the user clicks **Yes** in the confirmation dialogue that pops up upon selecting the Delete action.

Role Profile Access

WFR-245714: Role Profiles are now available to all companies and no longer require the Personal Experience functionality to be enabled. This includes features such as:

- The Role Profile report.
- The Role Profile field in the Employee Profile.
- The Role Profile field in Default Profiles (**Company Settings > Global Setup > Company Setup > Default tab > Default Profiles > Profiles** widget).
- The Role Profile field in Cost Centers (**Company Settings > Global Setup > Cost Centers >** Click **Edit Tree (Cost Center)** control in the Company Cost Centers report > Click **Edit Cost Center Information** in the **Cost Center Selector** (in Cost Center Tree Settings Defaults label should be checked).
- Role Profile field in Job (**Company Settings > HR Setup > Jobs > Edit/Add New**).
- Permissions controlling the visibility of the above (at least View in **Company Settings > Profiles/Policies > Security > New/Edit** > **Profiles** tab > **Profiles** widget > **Roles**), or for Admin companies

under **Maintenance > Admin Company > Configurations > Security Profiles > New/Edit >Profiles** tab > **Profiles** widget > **Roles**).