Release Notes Summary

December 2020
R72

This document contains detailed descriptions of release notes for the release date/month shown above.

Release Information

Release Dates

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

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

Supported Operating Systems and Browsers

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

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

TLM Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ***For full details on any of the following enhancements, including screen shots, please see the detailed TLM release notes for December 2020.***

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!

Added Document to Time Off Request / Modify Time Off Request

Attach Documents in Time Off Request Pop-Up

WFR-198069: Users can now attach a document to a Time Off Request. A new setting has been added to the *Default Settings* widget in the *Time Off Request Profile, Employee Can Attach Document*. When this option is enabled, a paperclip icon will display on the *Time Off Request* pop-up, giving users the ability to attach documents to the request.

Document Link Added to Pop-Up/Ability to Delete

WFR-198080, WFR-198566: From the pending Time Off Request pop-up, users will be able to view documents that were attached to the Time Off Request.

All Time Off Documents Report

WFR-203714: An *All Time Off Documents* report is available, which will contain information on uploaded documents related to the time off request. This report can be accessed in Desktop, the Mobile App, and the Mobile Version on Desktop from the following:

- *Time > Reports > Time Allocation > All Time Off Documents*
- *My Reports > Time Reports > Time Allocation > All Time Off Documents*

Added Option to "Run Each Day of Frequency Period" in Extra Flat Pay Rule

WFR-199693: Previously, for Pay Calc 2.0 companies, in the *Extra Flat Pay* rule, the system would calculate based on hours worked in the week or the last day of the period one time at the end of the period.

What's been added: A new option, *Run Each Day Of Frequency Period*, has been added to the *Extra Flat Pay* settings for the *Weekly* frequency. When this option is enabled, the rule will calculate the counter amount for each day of the week where Overtime is calculated.

All Time Entry Report Excludes Deleted Time Entries

WFR-201029: Previously, deleted time entries from the timesheet would still display and were grayed out on the *All Time Entries* report. Going forward, deleted time entries will no longer display on the *All Time Entries* report, along with the *Approve Time Entries* reports and *Approve Time Entries* Report Dialogs notification report.

Bulk Timesheet – Manager Policies

Bulk Timesheet v2 – All Manager/Employee Changes Require Comment

WFR-164029: Users can add comments after updating the timesheet if the *All Employee Changes Require Comment* option is enabled in *Employee Policies* in the Bulk Hours Timesheet Profile, and/or the *All Manager Changes Require Comment* is enabled in *Manager Policies* in the Bulk Hours Timesheet Profile.

Bulk Timesheet v2 – All Manager/Employee Changes Require Reason Codes

WFR-164030: After saving a modification to the timesheet, a *Review Changes* pop-up will display for the user to choose a reason code and/or enter comments if the *All Employee Changes Require Reason Codes* option is enabled in *Employee Policies* in the Bulk Hours Timesheet Profile, and/or the *All Manager Changes Require Reason Codes* is enabled in *Manager Policies* in the Bulk Hours Timesheet Profile.

Change Cost Center Time Allocation Difference Between Classic and New Timesheet

WFR-198931: In the classic timesheet and new timesheet on Desktop, employees are able to split their time for a day without the ability to add or delete time.
With this release, employees on the Mobile App and the Mobile Version on Desktop can now split time with the *Edit Personal Time* option enabled.

Configuration Documents

Pay Calculations Profiles Rules Structure in Configuration Documents

WFR-198777, WFR-198848, WFR-198779, WFR-204538, WFR-204535, WFR-204536, WFR-204539: For companies utilizing Pay Calculations 2.0, users can download an easily understandable Configuration Summary document so that non-technical audiences can digest the document. The following Pay Calculation rules now have a customized structure in the PDF configuration document:

- *Exception Based On Start Time*
- *Exception Based On End Time*
- *Apply Counter Limits*
- *Apply Rate Table (Counters)*
- *Daily Overtime*
- *Weekly Overtime*
- *Identify Lunch And Breaks (v.2)*

CSV Format Exported an Extra Row When Using Two Data Records

WFR-203071: When exporting using a Custom Tabular (CSV) export format, most companies use a single Data Record when building the columns out that will be exported. However, if a second Data Record was needed that required different columns to export data in a different order, the second Data Record would export even if there was no relevant data, producing empty rows.

What's been added: A new checkbox has been added when *Data Record* is selected for the *Type*. When this box is enabled, empty rows will not display in the exported file for the second Data Record.

Data Collection

Allow CC1-10 to be Selected on InTouch

WFR-187086: Previously, InTouch devices only allowed Cost Centers 1-5 to be displayed for employees to transfer at the clock.
What's new: For organizations that need more cost centers to be available at the clock device, a new section has been added to the *Terminal Configuration* page, *Data Collection*. In this section, you can enable up to 7 Cost Centers for the *Change Cost Centers* soft key Type, and each cost center enabled in this section can be mapped to any of the cost center fields that are set up in Cost Center 1 through 10.

Deprecation Inline Message – "Time Entry Approval" Setting in Detailed Hours Overview Reports

WFR-208951: In a future release, the setting in the *Detailed Hours Overview* report, *Time Entry Approval*, will no longer be supported. The following warning message will display at the top of the report: *The Time Entry Approval report setting in the Detailed Hours Overview will be retired in the February 2021 release. Time Entries can alternatively be approved from the All Time Entries report, Approve Time Entries report, or directly within timesheets.*

InTouch Firmware v2.3.2.51 Verification

WFR-202216: Firmware for InTouch clocks has been updated to version 2.3.2.51.

Mass Delete Requests via Pending Approval Reports

Mass Delete Functionality on Overtime > Pending Approval Report

WFR-190018: Previously, managers did not have the option to delete outdated or invalid overtime requests via the *Pending Approval* report (*Time > Overtime > Pending Approval*) as a mass action.
What's new: A *Delete* button has been added to the overtime request *Pending Approval* report under *Time > Overtime > Pending Approval*. This will affect the *Pending Approval* report and *History* report (MSS and ESS).

New UI Conversions

Notification Report "Time Entries To Approve"

WFR-196732: The notification report *Time Entries To Approve* has been converted to the Mobile App and the Mobile Version on Desktop. You can now set this report from the *First Screen* lookup in the Security Profile to be the user's first screen.

Overtime Enhancement for Pay Calculations 2

WFR-191200: To assist in Australian users needing to be able to apply overtime to a contracted number of hours, a new *Contract* option has been added to the *Non-Rolling Period (N-Days) Overtime* rule. This will allow users to assign hours worked over *Weekly*, *Per Month*, *Per Year*, or *Per Pay Period* hours set in the employee's specific contract.

Personal Rate Table Reason Codes

Rate Tables – Security Permissions for Extensions

WFR-184665: Previously, when users were given security permission to view/edit rate tables, those users were able to edit rate table entries as well as rate table extensions; there was no option available to separate view/edit permissions from rate tables and rate table extensions.
What's been added: A new security permission has been added under the *HR* tab within the *Rates* section, *View* or *View/Edit Rate Tables Extensions*.

Rate Tables – Require Reason Codes for Rate Table Entry Changes (Manual/HR Action)

WFR-184529, WFR-202650: Previously, there was not an option available to require a reason code for a rate table entry change, which made it difficult to track all changes made to rate tables by managers, as well as why the changes were made.
What's new: Users can now require managers to choose a reason code when manually, or through an HR Action, creating a personal rate table change. A new global setting has been added, *Personal Rate Table Changes Require Reason Codes*, under *Company Settings > Global Setup > Company Setup*, from the *Global Policies* tab.

Rate Tables

Added Global Rates History Report

WFR-189791: Currently, the *Detailed Rates* report only displays the employee's personal rate table.
What's new: A new report is now available, *Global Rates History*, under *Team > HR > Reports > Employee Maintenance > Global Rates History*. This report is similar to the *Detailed Rates* report, but the *Global Rates History* report includes historical rate changes for each rate table entry, and users can also edit the report.

Reporting

"Automatic Punch Out On Certain Labor Punch In" Timesheet Rule to Work with Early/Late Punches

WFR-202055: The Timesheet Profile rule, *Automatic Punch Out On Certain Labor Punch In*, allows for an Out punch to be auto populated for the day based on an employee's In punch, and the Out punch is generated based on hours from the employee's schedule, standard work day or a custom setting. Previously, the auto population did not work if an employee punched

before their scheduled start time. This caused managers to have to manually enter the Out punch for the day.
What's new: A new field, *Scheduled Start Grace Period*, has been added to the *Populate Settings* section of the *Automatic Punch Out On Certain Labor Punch In* rule. When enabled and with time entered, this will allow the system to still calculate the auto population of time if the employee punches within the configured range of the scheduled start time. If a start punch is entered within that grace period from the scheduled start time, the automatic punch out will be auto populated with the scheduled end time.

Start/End and Bulk Hours – Extra Settings

Enabled Keyboard Navigation

WFR-164020, WFR-163959: As seen in the Classic UI, in the new timesheet for both timesheet profiles, users can now navigate the timesheet fields using the arrows on the keyboard.

Start/End – Extra Settings

Start/End Timesheet v2 – Highlight Edited Time

WFR-163960: In the *Extra Settings* widget, the option *Highlight Edited Time* is available to enable, which will make manually entered or edited time on the timesheet under the *Time Entry* tab within the *From* and *To* columns highlighted with a red *e* symbol.

Start/End Timesheet v2 – Highlight Weekends

WFR-163966: In the *Extra Settings* widget, the option *Highlight Weekends* is available to enable, which will highlight Saturday and Sunday red on the timesheet.

Start/End – Manager Policies

Start/End Timesheet v2 – All Manager/Employee Changes Require Comment

WFR-163988: Users can now be required to add comments upon updating the timesheet if the *All Employee Changes Require Comment* option is enabled in *Employee Policies* in the Start/End (All Days) Timesheet Profile, and/or the *All Manager Changes Require Comment* is enabled in *Manager Policies* in the Start/End (All Days) Timesheet Profile. When the timesheet is updated, a *Review Changes* pop-up will display.

Start/End Timesheet v2 – All Manager/Employee Changes Require Reason Codes

WFR-163989: After saving a modification to the timesheet, a *Review Changes* pop-up will display for the user to choose a required reason code and/or enter comments if the *All Employee Changes Require Reason Codes* option is enabled in *Employee Policies* in the Start/End (All Days) Timesheet Profile, and/or the *All Manager Changes Require Reason Codes* is enabled in *Manager Policies* in the Start/End (All Days) Timesheet Profile.

Time Input Component Updates

WFR-205609: The following updates have been made to the Time Input field:

- The "*m"* symbol has been replaced with an "*e*" in the Time Input field in the Timesheet.
- The "*e*" symbol is highlighted in red in Read-Only Timesheets.

Time Entry Logic on Days with Multiple Entries – Timesheet v2

WFR-194406: When users enter time in the time entry field, the system chooses whether to select AM/PM based on what the previous entry was. Previously, when a second time entry was made on the same day, the system did not consistently select AM/PM correctly. Going forward, the system will interpret AM/PM correctly for multiple time entries in the same day.

Time Off Reports and Card View Consolidation

Time Off History <MSS> Employee's Name Added to Cards

WFR-198919: Previously, if the employee selector was empty, there was no way to differentiate employees' time off cards.
What's been added: In order to help distinguish employees' time off cards in the *Time Off History*, the employee's name will now be included in each time off card whether the employee selector was filled out or not.

Timesheet Punch Settings

Show Change Punch Interpretation (Mobile)

WFR-178856: In the September 2020 release, a newly designed Change Punch In/Out Interpretation icon was made available in the New Timesheet Experience for Desktop users. In this release, the Change Punch In/Out Interpretation icon is now available for Mobile App users, which will allow them to easily change their punch from In to Out and vice versa.

Timesheet v2

Web Punch Access Profile – Clock Widget

WFR-198556: *Web Punch Access Profile* settings are now supported on the *Clock* widget and *Clock* page for the Mobile App and the Mobile Version on Desktop.

Timesheet Views Added Back to Menu

WFR-204066: In a previous release, timesheet views were consolidated and removed from the Menu, which required more clicks from the user.
In this release, all *Timesheet Views* (depending on what is enabled in the user's security profile) have been added back to the Menu under *Team > Time > Timesheets* for Desktop, the Mobile App, and the Mobile Version on Desktop. These views include:

- **All Timesheets**
- **Pending Approval**

- **By Pay Period**
- **By Week**
- **Current**
- **All Open**

Timesheet v2 – Historical Timesheet Corrections

Processed and Locked Timesheets Have Correct Button

WFR-178035, WFR-200399: As seen in the Classic Timesheet, in Desktop, the Mobile App, and the Mobile Version on Desktop, for Bulk Hours and Start/End (All Days) timesheet profiles, managers and employees, if given permission, now have the ability to correct an employee's timesheet if it has been locked. Timesheets that are locked through the Time Prep process will have a *Correct* button that can be used to open the timesheet for corrections.

In order for users to be able to correct timesheets, *Timesheet Correction* needs to be enabled in *Available Functionality*. In addition, *Historical Records* in *Business Process Steps* needs to be enabled. In the manager's security profile, under the *TLM* tab, enable *Correct Timesheet*. For employee's, enable *Correct Personal Timesheet* under the *ESS* tab.

Added Historical Timesheets Tab to Timesheet v2

WFR-178052: For users who have the *View Timesheet Correction History* security permission enabled, a *Historical Timesheets* tab will display on timesheets that have been corrected.

Historical Timesheets Tab – Time Entry – Timesheet v2

WFR-201512: From the *Time Entry* tab under the *Historical Timesheets* tab, users can view the time entry data in the timesheet prior to the timesheet being corrected.

Historical Timesheets Tab – Extra Pay – Timesheet v2

WFR-204437: From the *Extra Pay* tab under the *Historical Timesheets* tab, users can view the extra pay data in the timesheet prior to the timesheet being corrected.

Historical Timesheets Tab – Adjustments – Timesheet v2

WFR-201508: From the *Adjustments* tab under the *Historical Timesheets* tab, users can view the adjustments data in the timesheet prior to the timesheet being corrected.

New Require Note on Corrected Timesheet

WFR-190033: Previously, users could require a note to be included upon rejecting or approving a timesheet but could not require a note when correcting a timesheet. Going forward, employees and managers can be required to leave a comment when correcting a timesheet.

In the Timesheet Profile, within the *Extra Settings* widget, enable the setting, *Require Timesheet Correction Note*.

Corrected Timesheet Note Included on Timesheet Approval History

WFR-199651: Previously, when employees and managers corrected timesheets after they were locked, there was no way to track a reason for these corrections.

A note can now be required after a user corrects a timesheet. The note will display in the *Timesheet Approval History* pop-up on the timesheet and the *Timesheet Approval History* report.

View Historically Corrected Timesheets from Current Timesheet/Time Entries from Pop-Up – Timesheet v2

WFR-178054, WFR-201426: A *Historical Corrections* button will display in the current timesheet if there are historical timesheet corrections that coincide with the timesheet dates. When you select *Historical Corrections*, a pop-up window will display with any timesheets that have timesheet corrections associated with the timesheet.

Verify CC Lookup List Component – Rate Table

WFR-196351: Previously, the Cost Center lookup was not displaying cost centers in the *HR Detailed Rates* page if the option in the *Settings* section of Cost Center Properties, *Allow Time Allocation Towards This*, was disabled. Going forward, cost centers will display in the lookup if *Allow Time Allocation Towards This* is not enabled.

New Timesheet Feature Gaps

All New Timesheet feature gaps (outlined in the *New Timesheet Feature Gaps* table in the September 2020 R70 TLM Release Notes) have full feature parity with the Classic Timesheet.

Table of Relocated Pages

In the full version of the TLM Release Notes, please refer to the *Table of Relocated Pages* for details on pages that have moved to another part of the menu. These menu changes affect either the Mobile App, the Desktop Experience, or both.

PAYPRO
Workforce Management

Scheduler Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ***For full details on any of the following enhancements, including screen shots, please see the detailed Scheduler release notes for December 2020.***

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!

Added Monthly and Weekly Schedule Overview Pages

WFR-196701, WFR-196700: In a previous release, the *Schedule Overview (Monthly)* and *Schedule Overview (Weekly)* pages were deprecated. Going forward, these two pages will be available in Desktop, under *Team > Schedule > Schedule Overview (Monthly)* and *Team > Schedule > Schedule Overview (Weekly)*.

Added Checkbox Multi-Select Option and Edit Button for Mass Edit in Summary By Employee Report

WFR-173867, WFR-173868: In Desktop, the Mobile App, and the Mobile Version on Desktop, in the *Summary By Employee* report, checkboxes are now available for you to select multiple shifts. When selected, you have the option to mass delete by clicking the *Delete* button at the top of the report. In addition, there is an *Edit* button available, which will display a *Manage Shift* pop-up window. From the *Manage Shift* window, you can apply edits to the date, time, cost center, skill, etc. for the selected shifts all at one time.

MSCC and SCC Widgets – Search

WFR-193184, WFR-193183: In the Mobile App and the Mobile Version on Desktop, a search bar has been added to the *Scheduled Cost Center* and *Managed Scheduled Cost Center* widgets in the Employee Profile.

Replaced Time Frame for Total Hours on Time Off Display on Schedules (Bulk Type Only)

WFR-173847: Previously, time off displayed on schedules as a timeframe (i.e. 12a-8a) for a full day or partial day (bulk) time off. This could be confusing to managers, as it indicated the employee was only off during those hours but may be available outside those hours.
What's new: Time off hours that do not have a defined start and end time will now display the total amount of hours taken off instead of a timeframe.

Time Off Hours in Schedule Hours Calculation

WFR-187276: Previously, for time off in schedules, the time off was included by default in the scheduled hours, which caused issues such as the time off being included in total hours, as well as visually misrepresenting the scheduled hours in the schedule views.
What's new: You can now choose whether to include time hours off in schedules. From the *Time Offs* page (*Company Settings > Global Setup > Time Offs*), in the *Time Off Properties* widget, a setting is available to enable within the *Settings* section, *Include Time Off in Scheduled Hours*. This setting will control if time off should be taken into calculation for total hours on schedules and reports and will reflect visually in the schedule views.

Weekly Schedule by Daily Rule Available in Mobile Version on Desktop

WFR-199256: The *Weekly Schedule (By Daily Rule)* report is now available in the Mobile App and the Mobile Version on Desktop, under *Team > Schedule > Team Schedule View > Weekly Schedule (By Daily Rule)*. Edit actions in the report will be available in a future release.

HR Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ***For full details on any of the following enhancements, including screen shots, please see the detailed HR release notes for December 2020.***

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Benefit Plans

Vendor Copy Column Added to Benefit Plans Report Page

WFR-198465: In the October 2020 system release (WFR-14701), a setting was created at the parent level of the benefit plan to allow the system to automatically copy employee level vendor information from one plan year to the next. As a benefit administrator, you can now easily see on the benefit plan listing page which plans have that setting enabled (*Company Settings > Profiles/Policies > Benefits > Plans*). New **Benefit Plan: Vendor** columns can now be added to the report page via the *Select Columns* option. If there are multiple vendors, additional columns are available.

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

Checklists

Checklist Bell Count

WFR-202745: The My Checklist Bell Count will be restored to its previous functionality. This feature allows users to easily identify how many checklists have open items assigned to them by viewing the Bell Count. **IMPORTANT NOTE***: The Bell Count will not be available immediately following the system release. This functionality will be restored in a phased rollout over a period of several weeks.*

Compensation Management

Link Added for Loop Dependencies found within Organization Chart

WFR-196656: Loop dependencies can happen within a company's organization chart. For example, Monique is the boss of John and John is the boss of Monique; this loop dependency is a problem that will prevent Compensation Management from being used. To solve this, when an error message is shown within Compensation Management, the error message will now contain a clickable link.

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

Custom Forms

Employees Able to See Manager Notes on Modified Custom Forms

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

Demographic Custom Fields

Default Value After Employee Creation

WFR-178985: Previously, when a Demographic Custom Field containing a default value was used to hire employees, the default value was not filled on the employee profile page. This applied to manual hire, hire through HR Action and employee import.

- Now, when a Demographic custom field with a default value is defined in the Company (*Company Settings > Profiles/Policies > Demographic > Custom Fields*), this default value will now appear in that demographic custom field upon hire of the employee whether through manual hire, HR Action hire, API or import. This will function just as it does when a default value is entered into an HR custom field.

Employee Information

Training/Certification: Lookup List Added

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

HR Actions

Limiting Codes Presented to Users for Position Assignment Action Item

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

Future Dated HR Actions for Pay Grades

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

Imports

Employees Import: Personal Email Field Added

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

Managed Cost Centers

In the February 2020 system release, work was done to Managed Cost Center functionality to make it available in more areas of the application. This included adding a new Cost Center Managers widget to cost center maintenance under Global Setup where managers and permissions could be added. In this release, we are continuing to expand this functionality by adding additional managed cost center functionality for HR Recruitment.
NOTE: This is an extensive write up. For details, please download the regular HR release notes for December 2020.

National ID

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

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

Imports: Employees Contacts Import Template Updated with National ID Fields

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

Notifications

Reminder Notification for Expired Visas

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

Pay Grades

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

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

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

Warning Message Added When Changing Step and Grade via Mass Edit

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

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

Performance Management

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

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

- From the All To Do Items report, located under *My Info > My Reports > System Reports > System Utilities > All To Do Items*, a **Show Lost To Do Items** selector will now be available to view these items when selecting **Performance Review** from the selector drop-down. The items displayed will give the option to **Assign** the lost item to a valid user. That user will then get the To Do item assigned to them and it will appear in their Mailbox To-Do Items and will appear on the All To-Do Report now as a valid To-Do Item vs. a Lost To Do Item.
- In the Lost To Do view, the *Select Row* and *Delete To Do Item* checkboxes will not be available in the row-level actions and the *Delete To Do Items* and *Delete All To Do Items* buttons will also not be available from the top of the page. The reason for this is due to the status of the items being lost and they were never created/sent to a specific person. You would need to delete the performance review from the actual Performance Reviews page, which will then delete it from the All To Do Items report page.

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

Bulk Download of Performance Reviews

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

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

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

Performance Reviews: E-Sign of Reviews After Finalizing

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

- Managers are not required to be part of the review steps piece of the workflow but can still sign if they are associated to the Manager sign step.
- Using the E-sign framework for employee and manager, the administrator can add the Sign steps in the workflow that would come <u>after</u> the finalizer step allowing a user to e-sign before the finalizer step.
- When the E-Sign button is clicked on either Employee or Manager sign steps, it will automatically bring the user to the Summary tab instead of the Instructions tab first.

- The message piece on the manager sign and employee sign steps that state "and before the "Finalize" step" has been removed. This piece of the step message was a reminder to include sign steps prior to the Finalize step and no longer applies.

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

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

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

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

Performance Review Workflow: Visibility Options for Reviewees

WFR-99094: Based on configurations, employees historically have been allowed to view feedback from all managers, both while in progress and at the completion of the review. In the **Use Visibility Settings For Reviewee** section of the **Review** and **Check** steps of Performance Review workflows, we have updated the logic so when these settings are enabled in one step, the logic will be retained on each subsequent Review or Check step in the workflow and the settings will be visible in those subsequent steps to the workflow creator(s).

- For example, if you have three Review steps in a workflow, and on Review Step 2 you enable the visibility settings for reviewees, those settings will carry forward to Review Step 3, will be viewable to the workflow creators in workflow configuration but will be grayed out and read-only so the settings cannot be changed.
- These workflow visibility settings for reviewees override any visibility settings in the Options widget of the employee's assigned performance review profile. . If the workflow doesn't have the visibility settings enabled, the profile will determine what they can see.

Performance Review Workflow: Visibility Options for Reviewers

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

- These workflow visibility settings for reviewers override any visibility settings set in the *Options* widget in the user's assigned performance review profile. If the workflow doesn't have the visibility settings enabled, the profile will determine what they can see.

Position Management

Reports: Default Column Changes in Position History Report

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

- Position Name
- Employee Full Name

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

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

WFR-152942: A new **Show All Positions** security setting has been added to security profiles that will allow users to view position assignment details and exception reporting that goes beyond the user's set hierarchy of positions.

- The setting is located in the Position Management Reports widget on the Reports tab of security profiles and affects the Position Headcount Detail report, Position Headcount Summary report and Exceptions for Reports-To Position report.

Recruitment

Offer Letters

EPIC WFR-181802, EPIC WFR-181785
A new ***Offer Letters*** option is now available to support creating and maintaining offer letters for both internal and external applicants. The option is located under *Team > Recruitment > Offer Letters*. The letters contain pre-defined text with multiple system tags that will auto-fill account and system data. You can edit the text with a full HTML text editor and can add other tags. These letters will be sent via email to the recipient(s) using the email address on file for the applicant.
NOTE: This is an extensive write up. For more details, please download the regular HR release notes for December 2020.

Recruitment & Position Management

Position Fields Added to Recruitment Report Pages

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

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

Recruitment Questionnaires

Questionnaires Available for Internal Applicants

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

Warning Message Icon Added to Questionnaire Link

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

Reports

Course/Certification Fields Added to Training/Certification Report

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

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

Select All Option in Multiple Report Pages

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

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

Payroll Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ***For full details on any of the following enhancements, including screen shots, please see the detailed Payroll release notes for December 2020.***

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!

Ceridian XML Update for Social Security Tax Deferral

WFR-195856: In response to the COVID-19 related deferral of employee Social Security tax, Ceridian has added new tax codes to the XML file. Please see the detailed Payroll Release Notes for a full list of the new tax codes.

Forms 1099-NEC and 1099-MISC

1099-NEC Forms Can Be Downloaded

WFR-194462: Users can now download form 1099-NEC at the following locations:

- *Payroll > Forms > 1099-NEC*
- *HR > Forms > Governments Forms > 1099-NEC*

1099-MISC Forms Can Be Downloaded

WFR-198096: Users can now download form 1099-MISC at the following locations:

- *Payroll > Forms > 1099-MISC*
- *HR > Forms > Governments Forms > 1099-MISC*

Forms 1099-NEC and 1099-MISC Can Be Delivered from Year End Processing

WFR-193255, WFR-194432, WFR-198063, WFR-198093: Administrators can initiate delivery of forms 1099-NEC and 1099-MISC at:
Maintenance > Administration > Year End Processing > Payroll Year End Processing > Utilities

Override Unemployment State Field Renamed

WFR-198270: In the Mass Edit Pay Statements window, the Override Unemployment State field is now named Override Unemployment State/Province to clarify that it can accept a Province when required.

Payroll Country Verification

WFR-187306: When the system processes a payroll or calculates pay statements, it now verifies that the Country configured for the payroll matches the Country of the default company bank and the originating bank.

Cross Product Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ***For full details on any of the following enhancements, including screen shots, please see the detailed Cross Product release notes for December 2020.***

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!

Affordable Care Act (ACA)

ACA Data Summary & ACA Data Detailed Reports Performance

WFR-203571, WFR-203327: The system has been updated so the ACA Data Summary and ACA Detailed reports run more quickly and do not give a Difficulty retrieving data error when processing very large numbers of employees.

2020 Form 1094-C

WFR-193279: The 2020 version of From 1094-C has been added and is available in the system. It is available under *Team > Benefits > ACA > Forms > Employer Forms 1094-C*.

2020 Form 1095-C for Employees and Dependents & Pressure Sealed Form Updates

WFR-193273, WFR-193274, WFR-193275, WFR-185313:

Employees 1095-C Form

The 2020 version of Form 1095-C is now available for download and use in the system under *Benefits > ACA> Forms > Employee Forms 1095-C* and the year 2020 is selected. This is available when selecting *Add New* or *Mass Add New*.

Dependents 1095-C Form

Form 1095-C for Dependents is also available and is located under *Benefits > ACA> Forms > Dependent Forms 1095-C.*

NOTE: For this menu option to be available, you must check the *Enable COBRA reporting for self-insured health plan* within the ACA Settings widget of Company Setup.

Pressure Sealed Form

The Pressure Sealed 2020 Form 1095-C is available under the *Print Forms* link in the ACA Year End Processing checklist. The form has been adjusted to better fit the required paper so employees and postal service can see everything accurately. These adjustments only apply to the 2020 version.

New Codes for Line 14 in the ACA Timeline

WFR-193819: To assist users responsible for ACA reporting, the system now presents all possible codes that can go into Line 14 of the ACA Timeline, indicating the type of coverage offered to the individual, so that users can complete reporting for the selected year properly.

The following codes have been added to the *Line 14 Codes (Series 1)* drop-down in the ACA Timeline found within the Employee Profile by clicking on the *Manage Employee's ACA Timeline* link within the ACA Timeline Overview widget.

- 1L
- 1M
- 1N
- 1O
- 1P
- 1Q
- 1R
- 1S

NOTE: Due to the late release of the form and lack of specific instructions for these new codes, the system will not generate these codes automatically. If you wish to use these new codes for your 2020 reporting, the ACA Timeline will need to be updated manually or via import.

Support for New Codes for Line 14, New Line 17 to ACA Import

WFR-193820: Users can utilize the new codes for Line 14 and the new Line 17 on the Form 1095-C without having to go month-by-month, employee-by-employee, so that they can make updates in a fast and efficient manner.
On the tab *Sheet 2* of the *ACA Account Data* import template (with instructions), several updates/additions have been made.

New Line 17 Zip Code Row to ACA Timeline

WFR-193822: The IRS released the 2020 Form 1095-C, and this included a new Line 17 for Zip Code. The system now presents users with the new field, Line 17, on the 2020 Form 1095-C, so users can be sure they are providing their employees with the most up to date version of the form and remaining compliant with IRS regulations.
A new row has been added to the ACA Timeline found within the Employee Profile by clicking on the *Manage Employee's ACA Timeline* link within the *ACA Timeline Overview* widget. This new row appears on the *Form 1095-C* section of the page, after *Line 16 Codes (Series 2)*. The row is labeled as *Line 17 Affordability Zip Code*.
REMINDER: It is a best practice to update the ACA Timeline for an employee and not the individual Form 1095-C. Should you need to delete the Form 1095-C, any manual adjustments made to it will be deleted as well.

Advanced People Analytics

Sentiment Analysis on Tablet

WFR-190404: The Sentiment Analysis functionality now works on a tablet (for browser screen < 1370px) the same way as on the Desktop version but displays as a pop-up.

Sentiment Analysis on Mobile

WFR-186409: Sentiment Analysis functionality now works on the Mobile Application the same way as on Desktop version.

Label of Analyzed Questions on Sentiment Panel

WFR-200375: The Analyzed Questions label has now been updated to *Analyzed Responses* to make it clearer to end users what is being analyzed.

Add Sentiment Column to Recruitment Questionnaire Answers Report

WFR-198047: A new column, *Question Sentiment*, has been added to the Recruitment Questionnaire Answers report (*Team > Recruitment > Candidates > Recruitment Questionnaire Answers*). This column is not included by default, but it can be added via *Add/Remove Columns*. The column is available if the Sentiment Analysis functionality is enabled for the company and the appropriate security items are enabled for the user.

Message When a Questionnaire uses Sentiment Analysis

WFR-193533: For companies with the Recruitment Marketplace product and Sentiment Analysis enabled, when the question configuration is saved, an information icon displays next to the question. When users hover over the info icon, text appears that reads: *For privacy, please avoid entering personally identifiable information*.

Guided Analysis Logic Functionality Extended

WFR-200113: Report views generated by the system within the Guided Analysis functionality are differentiated from other report views by the "*Owner*" field value, set to *AIMEE*. The AIMEE prefix has been removed from the Report View. All of the AIMEE views are filtered by "*My*".

Questions 4, 5 & 6 in Guided Analysis for the Internal Benchmarks Report (Cost Center View)

WFR-190168:For companies with *Advanced People Analytics - Full* and *Internal Benchmarks (Beta)* enabled and where the Internal Benchmarks section in *Company Settings > Analytics Setup > AIMEE Definitions* contains domains to detect benchmarks by Cost Centers, the Internal Benchmarks by Cost Center report is available in the system.
The fourth question on the Guided Analysis AIMEE Insights Panel in the Internal Benchmarks by Cost Center report asks, *Which employees are contributing to a specific Cost Center being outside the benchmark?* An input field allows users to enter digits from 1 to 99 to select the number of employees, and the default value is 10.
WFR-192891: The fifth question on the Guided Analysis AIMEE Insights Panel in the Internal Benchmarks by Cost Center report asks, *Which employees are contributing to a specific metric and Cost Center outside the benchmark?*
Users can expand and collapse the following prompts for this question, and can select the needed values for each:

- A drop-down for a Cost Center.
- A drop-down for a Main Metric.

WFR-192559: The sixth question on the Guided Analysis AIMEE Insights Panel in the Internal Benchmarks by Cost Center report asks, *What are the benchmark statistics for a specific metric and Cost Center?*
Users can expand and collapse the following prompts for this question:

- A prompt for a Cost Center (drop-down) that retrieves all possible values from the Internal Benchmarks configuration. This prompt is required, and the default value is the first value in alphabetical order.
- A prompt for a Main Metric that uses the *Grouping of the Metrics* table, and the Main Metric column. This prompt is required, and the default value is the first value in alphabetical order.

Users can select the needed values in the prompts.

Enhanced Guided Analysis Questions

WFR-202122: The drop-down titles for the following questions have been updated to the following verbiage:

- For Question 1, it now reads: Number of Top Cost Centers to Evaluate
- For Question 2, it now reads: Number of Top Cost Centers to Evaluate
- For Question 4, it now reads: Number of Top Employees to Evaluate

No Data for Guided Analysis

WFR-200104: Users cannot run the Guided Analysis report if there is no data uploaded. Users can see an error if the Guided Analysis report cannot be run for any reason.
If there is an error on the Internal Benchmarks report, then the *Guided Analysis* icon is disabled and a tooltip explains *There is no data*. If there is no data for the last 365 days, then after processing, the Guided Analysis - Insight Explorer screen is opened with the error message *There is no data to display for your request. Please try again later*.

Guided Analysis: Header of Answers

WFR-190860: For companies with Advanced People Analytics and Internal Benchmarks enabled, users can see the header of the Guided Analysis answers on the Insights Explorer page so that they understand what questions were answered. The Internal Benchmarks by Cost Center report is available for the users in the system (*Analytics > Reports > Internal Benchmarks > Internal Benchmarks by Cost Center*).
Users who click the *Guided Analysis* icon, choose the question, and then click the *Assist Me* button are directed to the Insights Explorer page, which contains a header that consists of the question text and the passed parameters from prompts, which are in bold. The following headers are displayed, depending on the question(s) selected:
Q1: "*Which Cost Centers are outside the benchmark and which employees are contributing to that? Number of top Cost Centers to evaluate: {Number of Cost Centers}*"
Q2: "*Which metrics are contributing to Cost Centers outside the benchmark? Number of top Cost Centers to evaluate: {Number of Cost Centers}*"

Q3: "*Which metrics are contributing to a specific Cost Center being outside the benchmark? Cost Center to evaluate: {Cost Center Name}*"
Q4: "*Which employees are contributing to a specific Cost Center being outside the benchmark? Number of top employees to evaluate*: Top {Number of employee} for {Cost Center Name}.
Q5: "*Which employees are contributing to a specific metric and Cost Center outside the benchmark? {Main Metric Name} for {Cost Center Name}.*
Q6: "*What are the benchmark statistics for a specific metric and Cost Center? {Main Metric Name} for {Cost Center Name}*

Automate Analytics Customer Data Deletion Process

WFR-155365: For Data Retention purposes, the hard delete process for data and integration with the application has been automated so the process does not need to be manually initiated.

Amount-Based and Quantity-Based Counters in Analytics Counters Report

WFR-182648, WFR-171113: Users with security permissions to view Counters reports can view Counters data, including Amount-based and Quantity-based Counters, and create different charts so they can analyze the data. Under *Analytics Reports > Counters*, the following apply:

- The *Counter Name* column includes Amount-based and Quantity-based counters.
- There is a new default column, *Counter Amount*, for Amount-based counters in the report.
- There is a new default column, *Counter Quantity*, for Quantity-based counters in the report.

Employee Manager 1- 6 History in Analytics Reports

WFR-173253: Historical data for the Employee Manager 1-6 fields is now displayed in Analytics reports such as:

- *HR* report
- *Counters* report
- *Time Off* report
- *Exceptions* report
- *Contribution Factors*
- *Internal Benchmarks by Cost Center*

Time Values on the Insights Explorer Page

WFR-200519: Time values are now shown correctly (HH:MM, HH.00 or HH,00) in the Custom Column on the Insights Explorer page. The values are shown in one of the formats within the Company Settings (*Company Settings > Global Setup > Company Setup*). Some examples of items this applies to are:

- The *TimeOffTotalTime (Requested Time)* Custom Column under *Analytics > Reports > Time Off*.
- Custom columns in *My Reports > Time Reports > Calculated Time > Calculated Time Summary (Counters*).

Calendars

Birthday Calendars Available in Mobile Environment

WFR-196368, WFR-196370, WFR-196367: The monthly, weekly and yearly birthday calendars are now available in the mobile environment. This applies to users with proper security permissions (Reports tab, Employee Information Reports section.)

Monthly Birthday Calendar

- My Info > My Reports > HR Reports > Calendar > Birthday Calendar by Month
- Team > HR > Reports > Calendar > Birthday Calendar by Month

Weekly Birthday Calendar

- My Info > My Reports > HR Reports > Calendar > Birthday Calendar by Week
- Team > HR > Reports > Calendar > Birthday Calendar by Week

Yearly Birthday Calendar

- My Info > My Reports > HR Reports > Calendar > Birthday Calendar by Year
- Team > HR > Reports > Calendar > Birthday Calendar by Year

Company Documents

My Company Documents Converted to a Report Style Page

WFR-202894: The Documents page, located under *My Info > My Company > Documents* has now been converted from a table format to a standard report style page where views can be saved, columns filtered/added/removed, etc. The list of documents is uploaded from *Company Settings > Our Company > Document Upload*.

Configuration Documents

Pay Calculations Profiles Rules Structure in Configuration Documents

WFR-198777: For companies utilizing Pay Calculations 2.0, users can download an easily understandable Configuration Summary document so that non-technical audiences can digest the document. The Pay Calculation rule *Exception Based On Start Time* now has a customized structure in the PDF configuration document.
WFR-198848: The Pay Calculation rule *Exception Based On End Time* now has a customized structure in the PDF configuration document.
WFR-198779: The Pay Calculation rule *Apply Counter Limits* now has a customized structure in the PDF configuration document.

Dashboards

Dashboard Updates

UKG Ticket	Issue

WFR-169636	The tool tip for the Add option on a Dashboard displays only when one of the following scenarios occurs: A user has hit the maximum number of tiles and cannot add any more tiles. A user does not have permissions to modify their Dashboard.
WFR-201044	When selecting your company logo, clickable from any page in the system, you will be directed to your landing page, as defined by the First Screen configuration.
WFR-105979	For users managing their Dashboard views, the Delete confirmation message has been updated to: "*Are you sure you want to delete [View Name]? If the view is shared, it will also be removed for those it is shared with. This action cannot be undone*."
WFR-189317	Administrators configuring dashboard profiles for their users will now be able to preview how the tile will look to their end users as they add tiles. As tiles are added, or size is adjusted, the view will reflect tile size just as the assigned users will see them. This is available on each tab being configured in the profiles.
WFR-192272	The pop-ups displayed when copying tabs from the Classic UI Dashboard have been resized to sit on top of each other, instead of layering, to make a cleaner user experience.
WFR-193252	Employees Import: The Dashboard Layout Profile has been added as a profile option in the Employee Import template (*Company Settings > Imports > Overview*)
WFR-192379	PARTNER RESELLERS ONLY: The Dashboard Layout Profile has been embedded in the Security Profiles so that assignments can be controlled via the security profile (personas/roles/permissions) and at the Admin Company level.
WFR-197938	PARTNER RESELLERS ONLY: A new *All System Accounts* report page-level button has been added to the Security Profiles report. When selected, this will direct users to that report. In the *All System Accounts* report page, a *Dashboard Layout Profile* report column is available and can be added to the report page (this is not a default column.) A new Mass Edit report page-level button has been added to the All System Accounts report. When selected, this will direct users to page where Dashboard Layout Profile can be cleared from employee profile assignment.

Rename Option Added to Report/Chart Tiles on Dashboard Layout

WFR-185292: On the Dashboards, a *Rename* option is available under the ellipsis of Reports/Charts and Pivot Chart tiles. Upon selecting the *Rename* option, users can modify the label that appears on the tile. The Report name is displayed below the user defined name field.

System View on Domain Dashboards

WFR-188776, WFR-206911: When viewing a Domain Dashboard using the default view (*[System]*), if one user made changes (i.e. changing or deleting a widget), the changes were made for all other users with access to that Dashboard. Depending upon the user's assigned security profile settings, other users may not have seen the data in an added widget if their security did not allow it.
The *[System]* view for each Account and Domain Dashboard has been migrated to a privately owned view so that changes made to the view by one account are not reflected for another account. The following apply to the new default view, *[My System]*:

- The *[My System]* view owner is *My*.
- The *[My System]* view cannot be deleted.
- If the *[System]* view was previously set as a user's default, the *[My System]* view is the user's new default.
- If the *[System]* view was not previously set as a user's default, the default view remains as is.

The difference between the previous default view and the new default view is:

- The old view, *[System]*, was owned by everyone.
- The new view, *[My System]*, is owned by the Individual account.

Dashboard Widgets

Announcements Widget - Showing Details In Listings

WFR-147539, WFR-203184: Users can now view text and images in the Announcements widget listings without the need to click on the announcement headline, allowing users to read the important information quickly. The Announcement widget must be included in the Dashboard Layout, and users must have access to the posted announcements based on group or security profile settings.
Users can view and access all documents uploaded to each announcement via one click.

Employee Profiles

MSCC and SCC Widgets – Search Added

WFR-193184, WFR-193183: In the Mobile App and the Mobile Version on Desktop, a search bar has been added to the *Scheduled Cost Center* and *Managed Scheduled Cost Center* widgets in the Employee Profile. This will help users with a large number of cost centers to quickly search for what they need.

Imports & Exports

Employees Import: Behavior Change When Importing Pay Calc Profiles

WFR-180056: When importing Pay Calculations Profiles using the Employees Import template, the existing value can be overwritten it can now overwrite the existing value in the Profiles widget of employee accounts. Previously, if a value existed in the employee account, a second record was created instead of overwriting the existing value. You can also include a new effective date. If no Effective Date is listed in the employee's account, the current date will be used.
New Pay Calculations instructions are listed in the template for an {UPDATE LAST} column to be added after the entered value which will update the last record of the Pay Calculation profile instead of creating a new record.

Employees Import: Personal Email Field Added

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

PAYPRO Workforce Management

Integration Hub

Manage Integration Report

WFR-184690: The client level Manage Integration report is now available in the New UI environment under *Settings > System > Integration Setup*.

Manage Integration Properties

WFR-184692: The client level Manage Integration Properties report is now available in the New UI environment under *Settings > System > Integration Setup*.

Pay Grades

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

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

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

Warning Message Added When Changing Step and Grade via Mass Edit

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

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

Personalized Experience

Dashboard Call To Action (CTA) in Mini Header

WFR-180782: While scrolling on a page, users see a mini Header anchored to the top of the page. A green pill icon is included with the Dashboard CTA mini Header. Each Call To Action is an individual pill icon. When selected, the CTA directs the user to the appropriate destination (My Topics tab, External Link, Internal Link).

Today's Tasks in Mini Header

WFR-180770: While scrolling on a page, users see a mini Header anchored to the top of the page. A blue pill icon with a drop-down is included with all Today's Tasks for a given user. The pill icon contains the Today's Tasks, the "*+ number*" (of tasks), and the drop-down. By clicking the pill, a pop-up with the relevant tasks and counters appears. When the user selects a task, s/he will be redirected to the relevant report/page.

Add Link Indication to Dashboard Call To Action and Today's Tasks Drop-Down

WFR-186687: Users with multiple ongoing Events/Topics now have a clear indication that the list they see in the Dashboard Call To Action (CTA) drop-down is a list of different Events/Topics. This applies where the Home page with the Home Dashboard show several Today's Tasks and Call To Actions presented on the page.
By clicking drop-down icon, a list with Events appears. By selecting an Event from the drop-down list, the My Topics tab of the panel is opened. Upon hovering over an Event name, the background becomes light blue.

Platform

System Themes: Display Clock Setting Added

WFR-169591: Under System Theme configuration, the option to *Display Clock* has been added to the *Look & Feel (New UI)* widget. When selecting the option, the clocks will display in the header near the Search icon. This will also be available in the mini header.
This is done under *Company Settings > Global Setup > Look & Feel > System Themes*.

Notes: Clear Option Added

WFR-56991: A *Clear* button has been added under each note entry to allow users to quickly remove typed text without having to highlight and manually delete. This will be available anywhere in the system where Notes can be entered.

Supporting Documents Widget

WFR-194633: Throughout the system where documents can be uploaded, users can upload files from the Supporting Documents panel when the Integrated Document Storage Marketplace feature is enabled. The Upload action button is positioned on the top of the list with the uploaded files.
On the Mobile Application, Supporting Documents is placed on the level of Categories in the Clip icon. When the user clicks on the Clip icon, a popup with the Supporting Documents panel displays.

Notes Widget

WFR-194635: With the appropriate security permissions, users can view, add, and remove Notes within the widget. When a Note is added, a success message is displayed on the top of the panel. The design of the widget has been updated, and recently added Notes with the name of the person who left it are displayed at the top of the list.
In the Mobile Application, Notes are placed on the level of the *Categories - Notes* icon. When a user clicks on the Notes icon, a new pop-up with the same content as in the Notes panel is displayed.

Company Name on Landing Page

WFR-200595: Users now receive a quick and immediate confirmation that they are viewing their company's environment. The Company Name displays in the Home Dashboard header, and the name is determined in the header section of the System Themes. If the field is left blank, then nothing appears.

My To Do Items and My Mailbox

WFR-190294: The *My To Do Items* and *My Mailbox* have been retired from the Main Menu, Start Widget configuration, and Quick Links configuration in the New UI. Users can access these items by clicking the *My Mailbox* indicator (bell icon) in the upper right corner of the screen within the application, in both the Desktop environment and the Mobile Application.

Update System Theme Colors

WFR-198482: Theme colors for the header and mini header have been updated appropriately. The key default logos have been updated. These changes do not impact custom specific configurations.

Announcements Widget Pop-Up

WFR-156996: When using the Mobile Application, users can now view the Announcements pop-up for one or more Announcements on any First Screen displayed when they initially log in, such as the *New UI Dashboard*, *Current Timesheet*, *My Saved Reports*, etc. Users can now view text and images in the Announcements widget listings via a pop-up without clicking on the headline. A pop-up displays when at least one Announcement is Active with the *Show As Pop Up On Login* option enabled under *Company Settings > Our Company > Announcements*.

Profiles

Security Profiles: New Look Toggle Removed

WFR-201036: During the New UI transition process, we introduced an interim tool/toggle to help users transition between the New UI and Classic UI. With the transition now completed, this has been removed from the application. When enabled, the toggle was located in the banner, in the upper-right portion the user's session. The setting that controlled this toggle was enabled/disabled in user security profiles in the New UI Preferences widget. This security setting has also been removed.

Reports, Report Pages, & Reporting Options

Select All Option in Multiple Report Pages

WFR-101646, WFR-101630, WFR-101488, WFR-101486: Users can select all rows in multiple report pages, whether the rows are on the current or other pages, by using the Select All action. The top-left checkbox, at the header level, provides the *Select All* action.
When selected, a pop-up provides the ability to *Select On Page* or *Select All*. When the *Select All* checkbox is enabled, the top-left checkbox and all row-level checkboxes remain selected when a user navigates to multiple pages of rows within a report.

- **Employee Documents** report page (*Team > HR > HR Maintenance > Employee Documents*)
- **All Open Timesheets** report page (*Team > Time > Timesheets > All Timesheets > View By > All Open*)
- **All Open Timesheets** report page (*Team > Time > Timesheets > All Timesheets > View By > All Timesheets*)
- **Pending Approval** report page (*Team > Time > Timesheets > Pending Approval*)

Payroll Setup: Delivery Destinations Report Page Grouped by Type

WFR-205511: When selecting a destination from the *Deliver To* drop-down in the Export Report pop-up, listings are grouped by the type of destination, which is set via *Company Settings > Payroll Setup > Delivery Destinations*. For example, all Email destinations will be grouped together, all Printer destinations will be grouped together, etc.

Support for Deliver To: Google Drive Destination

WFR-206208: For companies using the Google Cloud Marketplace App, a Google Drive destination folder can be created to deliver and store reports.

Pre-Requisites

- Google Cloud Marketplace App must be installed and properly configured.
- Users should have access to Deliver Report security setting in their security profile (Reports section, Reports tab).

Creating the Destination Folder

- User logs in via Google Account and selects *Export > Deliver To*, then selects "Google Drive" Delivery Destination.
- User selects "Export" - export pop-up closes, and success message displays.
- User will see exported file in PDF within Google Drive, in the folder specified in Destination.

Run Immediately - Preserving Report State

WFR-167347: Where *Run Immediately* is unchecked for a report set to *Data Only* or *Charts & Data* view, when a user runs/executes a report that returns records, if the user navigates away and returns back, the executed report state is preserved. The report state is preserved when:

- The user performs an operation and navigates to another page.
- The user performs a row level action which navigates the user away to another page.
- The user navigates via Quick Links.
- The user navigates via the Employee Profile link.
- The user navigates to Company Settings via links in a report.

NOTE: Currently, if users open a saved report view set to a view type, such as "View Data", "View Charts", or "View Charts & Data", then if they change the view type to something else such as from "View Charts & Data" to "View Data" and then navigate away and return to the report, the original view type tied to the saved report view is shown instead of the last chosen view type. This is a known issue and will be addressed in a future release.

Complex Employee Lookup: Available Tab, Saved Lists Tab & Selected Tab (Single List)

WFR-200100: Users can now select, create, and overwrite Saved Lists in the Employee Filter of reports. The Saved Lists tab allows users to select multiple lists at a time by selecting the appropriate lists using the Checkbox column. The columns available for Saved Lists are:

- *Checkbox* column
- *Remove List* (trash can icon)
- *Name*
- Size
- *Created*

Users can select one or multiple Saved Lists and choose *Add To Selection*. After the user adds the selected lists, they appear in the *Saved Lists* on the *Selected Tab*. Users can also cancel the lookup by clicking on the *Cancel* button.

Complex Employee Lookup: Saved List(s)

WFR-202664, WFR-202666: Users can select multiple Saved Lists in the Employee filter as well as *Apply* the selection(s) based on Saved List together with other criteria such as a Group, Profile, or Advanced Filter, making Employee filter criteria selection quicker and more convenient.

Selecting Saved Lists

When a user selects the Saved List(s), the user can expand the list(s) to a static Employee list upon clicking *List As Employees* from the *Saved Lists* section. Upon clicking *List As Employees*, a confirmation message displays.

When a user expands Saved List(s) to a list of employees, the filter retrieves only those employees who are included into the Saved List(s) currently. If employees are added/removed from the Saved List, the change will not impact the applied filter. If the same employee is included in multiple Saved Lists, upon expansion to an Employee list, the employee is counted only once.

Removing Saved Lists

A trash can icon is available to delete or remove a Saved List under the Selected tab. If all lists are removed, the Saved Lists section will not display under the Selected Tab.

Complex Employee Lookup: Share View Based on Advanced Filter

WFR-205398: When a user shares a report view with other employees and the user sets Advanced Filter criteria to select employees to share the view with, upon applying the filter, a warning message displays.

The Advanced filter is expanded to an Employee List when the user clicks *Apply* on the *Selected*/*Available* tab of the Employee Lookup.

- This is not applicable for Groups, Profiles, or Saved Lists. It is only applicable for the Advanced Filter.
- This is not applicable for any other areas where the Employee Lookup is used (for example, the report employee selector). This is only applicable for the Share View action.

Deliver To Functionality for Reports

WFR-67702: Administrators now have access to the *Deliver To* functionality for reports so they can send reports to destinations such as Printers, Email addresses, Google Drives, etc. from the *Export* option within a report. Company Administrators must have *Full Access* enabled in their assigned security profile, and for System Administrators, the *Deliver Reports* security item must be enabled within the user's assigned security profile (*Maintenance > Admin Company > Configurations > Security Profiles*, *Reports* section on the *Reports* tab). Users must also be able to export reports via the appropriate security profile permission, *Export Reports*, in the *Reports* section on the *Reports* tab of their assigned security profile.

Retired Options/Features

Turtles Widget in the Classic Dashboard

WFR-14085: As of December 2020, Flash will no longer be supported in Google Chrome, and possibly other internet browsers. The Turtles widget in the Classic Dashboard and Dashboard Premium experiences will not work correctly since it requires Flash.

The Turtles widget in the New UI Dashboard experience does not require Flash and it works correctly with all supported browsers such as Google Chrome and Microsoft Edge. Users are encouraged to adopt the New UI Dashboard experience to ensure that the Turtles widget functions correctly.

SMS Twilio/Broadcast Messaging

Opt In/Out for Broadcast Messages

WFR-180326: Users can now opt in or out of Broadcast Messages, giving them added control over the types of notifications that they receive. A user can opt in/out from the Notification Preferences under *My Info > My Profile > Notification Preferences*. All Broadcast Messaging options are checked and active by default.

2-Way SMS Message for Approve/Reject Response

WFR-197864: When users receive an SMS text message to approve or reject a request, and the request is rejected and requires a comment as to why, the instructions in the text message will clearly instruct the user how to respond and allow them to enter the comment in the text message.
Example outgoing message
Please reply Y/N followed by this code 73756 to Approve/Reject this request. If N, please also provide a brief comment.
Reply STOP on +13173427186 to unsubscribe.
Response/Reply Example
N 76542 Employee no longer eligible at this time.

2-Way SMS Messages for Scheduler

WFR-183046: In Scheduler, some of the items that can be sent via SMS text messaging require additional details in addition to the approve/reject.
These items will contain additional details related to the request. For example: "*Please reply Y/N <space> followed by this code 11234 to Approve/Reject this request. Please note that the reply will automatically be applicable to the first Peer to Approve Peer request. Please login to WFR to change peers/modify this request.*"

- Schedule Open Shift
- Schedule Request for Coverage
- Schedule Shift Swap

Wiki Pages

WFR-197575: The Wiki functionality is now officially retired as of this release. All elements, pages and menu paths in the application that support access to Wiki have been removed.

Retired Products

The table below documents functionality that has been retired or is planned to be retired. These tables will be updated as needed with every system release. Please see the detailed Cross Product release notes for December 2020 for the full table(s).

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Retired Features

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
HR	**HR SBE (Small Business Edition) **Partner Resellers Only****	***Available Functionality***	All	Functionality No Longer Supported	December 2020
Platform	**My To Do Items** **My Mailbox**	***Main Menu Start Widget Quick Links***	New UI, Desktop and Mobile	Updated in the New UI. To access My To Do Items and My Mailbox users can click the My Mailbox indicator (bell icon, upper right hand corner)	December 2020
Full Application	Wiki	*Company Settings > Our Company > Wiki* *My Info > My Company > Wiki*	All	Functionality No Longer Supported	December 2020
TLM	*Time Entry Approval* report setting in *Detailed Hours Overview* report	*My Reports > Time Reports > Time Allocation > Detailed Hours Overview*	Desktop	This report is no longer supported. A warning message at the top of the report will display in R72, "The *Time Entry Approval*	February 2021

				report setting in the *Detailed Hours Overview* will be retired in the February 2021 release. Time Entries can alternatively be approved from the *All Time Entries* report, *Approve Time Entries* report, or directly within timesheets."	
TLM	VCA Configuration For Report Dialogs In Notifications	*Employee Profile*	Desktop, Mobile Version on Desktop, and Mobile	The VCA Configuration For Report Dialogs In Notifications section of the Employee Profile (which includes the *Enable Virtual Code Authentication* checkbox) is no longer supported. In replacement of the verification code, a security	December 2020

				token has been built into the link of the report.	
Classic Mobile App - WFR	Workforce Ready	N/A	Classic UI	Update to New UI version, *Kronos Workforce Ready*	August 2020
Classic Mobile App - Partners	TotalHRWorks	N/A	Classic UI	Update to New UI version *HCMToGo*	August 2020
Our Company in Company Settings My Company in My Info	Wiki Functionality	*Company Settings > Our Company Also removed from Online Help*	New UI	Functionality Removed	August 2020
TLM > Timesheet Profiles	Non-supported Timesheet Profiles	*Company Settings > Profiles/Policies > Timesheets*	New UI	Non-Supported Timesheet Profiles	October 2020

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Published by Kronos SaaShr, Inc., a UKG Company

3040 Route 22 West, Suite 200, Branchburg, NJ 08876