

# Workforce Management Release Notes for Version 5.1.9

Scheduled for Tuesday 15th November 2022

The update will start at 18:30 and could take up to 30 minutes.

PLEASE SEE UNDER IMPROVEMENTS ITEMS ABOUT RELEASE NOTES AND DISPLAY CHANGES ON THE ADMIN AND SELF-SERVICE SCREENS

## New Features

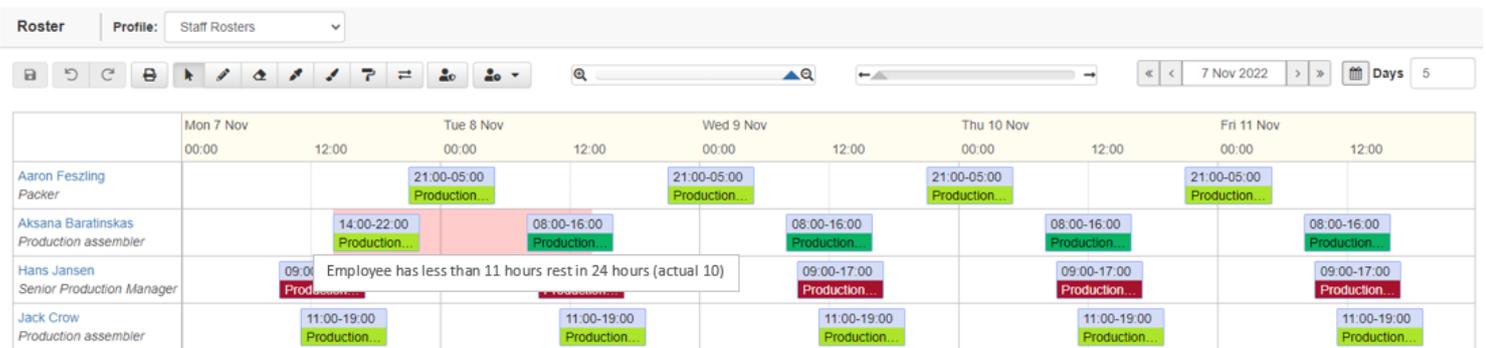
To add the new features which require a *License* please make enquiries to [salesteam@hfx.co.uk](mailto:salesteam@hfx.co.uk)

### T&A Specific New Features

#### Advanced Roster Constraint Rules (*License*)

The Staff Roster screen gives realtime warnings if managers add or edit roster periods that do not meet pre-defined criteria set up in constraint rules suitable for your organisation. It does not stop the manager from proceeding but gives a visual warning by highlighting the periods not conforming to the rules and showing the reasons why.

The constraint rules can help ensure that your organisation conforms to legislative requirements such as the Working Time Directive for the number of hours worked in a week and that your employees have the minimum required rest time between shifts.



	Mon 7 Nov	Tue 8 Nov	Wed 9 Nov	Thu 10 Nov	Fri 11 Nov
Aaron Feszling Packer	00:00 - 12:00	21:00-05:00 Production...	21:00-05:00 Production...	21:00-05:00 Production...	21:00-05:00 Production...
Aksana Baratinskas Production assembler	14:00-22:00 Production...	08:00-16:00 Production...	08:00-16:00 Production...	08:00-16:00 Production...	08:00-16:00 Production...
Hans Jansen Senior Production Manager	09:00-17:00 Production...	Employee has less than 11 hours rest in 24 hours (actual 10)		09:00-17:00 Production...	09:00-17:00 Production...
Jack Crow Production assembler	11:00-19:00 Production...	11:00-19:00 Production...	11:00-19:00 Production...	11:00-19:00 Production...	11:00-19:00 Production...

Constraint rules can be grouped in profiles that can be selectively applied to employees by, for example, by their job role, organisation, location, payroll group and contract group or a combination of these. This allows for greater flexibility for applying different rules to different sets of employees. An example would be for night shift workers; to work a maximum of 4 consecutive night shifts, have a maximum shift length and not starting before 22:00.

Criteria i

4 consecutive periods

matching filter Nights and

with duration between 10:00 and 12:00 and

starting at or after 22:00

The Roster Constraints are also integrated into the new Auto Manager feature for example to auto decline events that break constraint rules in profile(s).

The Roster Constraint Exception Report shows details of when the Constraint Rules have not been adhered to.

**Auto Manager** (License)

The Auto Manager feature reduces the amount of time managers spend dealing with requests. The Auto Manager can be configured to run rules for how to deal with absence requests and shifts swaps depending on their impact on the business. For maximum flexibility filters can select the types of absences and criteria for employee selection such as location and job role.

An example of an Auto Manager rule would be to auto approve a 5-day Annual Leave request if the person has sufficient leave entitlement, and it does not break a constraint rule on the number of employees allowed leave during that period. Similar rules can be set for shift swap requests.

The Auto Manager can auto approve, or auto decline or defer a request to the manager.

Examples of rule, filter and criteria used below

Absence Requests

If  for   --- AND ---

If  for   accept immediately

Edit Filter

Choose an "Employees" filter to restrict the scope of this rule to particular staff. On some rules, it may also be possible to filter on particular absence reasons or other shift attributes. These filters apply to the shift being requested, not to the person's job record.

Rules

- Absence Reasons  equal to
- Employees  equal to

Absence Requests

If  for  decline immediately

Shift Swap Requests

If  for  defer to manager

- <no condition; rule always matches>
- requirement level falls below min**
- requirement level rises above max
- requirement level falls below target
- requirement level rises above target
- requirement levels are between min and max
- roster constraints exceeded
- entitlement remaining is more than
- event is between X and Y days long
- event starts between X and Y days ahead
- event contains day(s) on cycle
- event starts in the last X days of the period
- absence leave level rises above max
- absence leave level rises above target
- absence leave levels are between min and max

## **Requirement Patterns**

Patterns of Requirements can now be defined to detail for example the number of employees by job role, skills and locations where needed with a minimum, maximum and target.

## **Balance Entitlements** *(License)*

Balance Entitlement Schemes can be used to apply and manage annual leave and sickness entitlement balances over time. The schemes can be pro-rated for part time employees.

For example, an Annual Leave scheme can be set up to apply an additional day of leave for each year's service over 5 years. Sickness schemes can be used to define how sickness absence entitlements conform to company sick pay policies. The schemes can be bulk applied, modified and end dated.

## **Staffing Levels**

This feature adds increased functionality to the existing employee level requirements in that a staffing level requirement can be set that now combines different shift types within a duration of time to make up the number of employees required. This is displayed on the Staff Roster to show if the target staffing level has been achieved for each day and group. This feature can be used in conjunction with the Advanced Roster Constraint Rules and the Auto Manager to manage staffing levels.

## **Operational Permissions** *(License)*

Operational Permissions allow managers to view employees who do not report to them but are temporarily deployed to their location or group on the Staff Roster & History screens for the deployment dates.

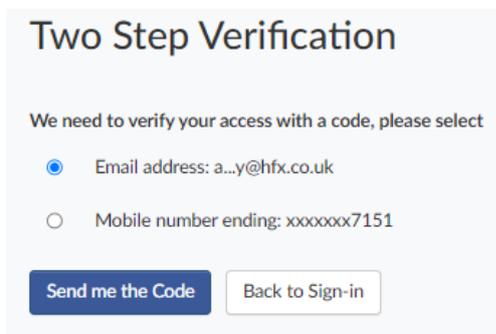
## **Show Full Group Path**

The client setting 'Hierarchy Display Formats' allows hierarchy items such as Location and Organisational Group to be displayed as the Node name, as previously or it's Full Path name.

An example of this is 'York' (Node) or 'England \Yorkshire\North Yorkshire\York' (Full Path). Each part of the group path can only have one 'parent' above it in the path. Changing this setting will be displayed on screens and reports across the system.

## **Other New Features**

### **Two factor authentication** *(License)*



The screenshot shows a 'Two Step Verification' screen. At the top, it says 'Two Step Verification'. Below that, it says 'We need to verify your access with a code, please select'. There are two radio button options: 'Email address: a...y@hfx.co.uk' (which is selected) and 'Mobile number ending: xxxxxxx7151'. At the bottom, there are two buttons: 'Send me the Code' and 'Back to Sign-in'.

For increased security there is a new license and with an employee permission, 'Requires Two Factor Authentication'

When enabled for a person, on login to either the Admin or Self-Service screens they will be prompted to request a verification code to be sent by email or SMS text depending on what is set up in their Comms Preferences.

They will not get access to the system without entering the code.

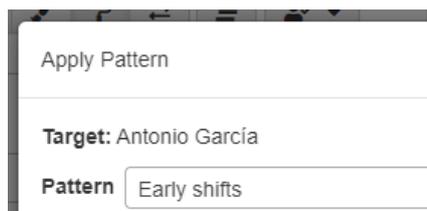
### Hide Config Menu Item

A new permission, “Hide Config menu item if User has read-only access to data” in the Configuration Data section, means that menu items in the Config menu will be hidden if the employee has only read only access for them in their permission profile.

## Improvements

### Display Changes on The Admin Screen

- The ‘User List’ has been moved from the Config menu to the Employees. *(For Flex, T&A and Access Control)*
- ‘Availabilities’ and ‘Break Types’ have moved from the Config menu to Planning. *(For T&A).*
- ‘Zone Allocations’ has moved from the Config menu and is only accessible through the button on the Access Control page. *(For Access Control).*
- The ‘Reports’ menu now lists the reports alphabetically. *(For Flex, T&A and Access Control).*
- Rows can now be highlighted on the History screen to help read across multiple columns. The ‘Today’ row is already highted. To highlight other rows double click in the date column and double click again to undo. *(For T&A).*
- The ‘Employees’ menu now includes ‘History’, if nobody has been chosen before it will display the first person listed alphabetically. *(For T&A).*
- When applying a pattern to a person on the ‘Staff Roster’ screen the person’s name is now displayed in the top of the Apply Pattern screen against ‘Target:’ *(For T&A).*



- When a person has been selected and their name appears in the top menu, the drop-down menu now includes quick access to their Roster. *(For T&A).*

## Changes to The Self-Service Screen



- When using a mobile to access Self-Service, the Calendar, Requests and Schedule pages now have the functionality of displaying a single day in each screen when the mobile is held in portrait mode and expanding to show more when in landscape mode

On the Daily Calendar view only the Schedule line is initially displayed. If tap again on schedule other information displays for the day, e.g.

Adjustments, Clockings and Requests. Changing to landscape mode displays the month.

On the Daily Requests page if there are multiple requests for the day others can be displayed by selecting the next arrow.

The Daily Schedule page defaults to today. *(For Flex and T&A).*

- 'Can view on Self-Service Colleague Schedule page', is a new setting against the Overtime Period. By default it is on, disabling it means that people will not be able to see the overtime periods of their colleagues in Colleague Schedule. *(For T&A).*

On the Home Screen for T&A employee's 'Programme' has changed to 'Today's Shift'. When there are no shifts, 'No Working Shift' is displayed. *(For T&A).*

## Other Improvements

- **IMPORTANT - Release Notes Change** - From the next software release the way release notes are sent out will change. Release notes will be sent out to the administrators of the system who have the permission "Has access to all employees in client". A new permission "Receive Release Notes" is automatically enabled for them. Administrators can opt out of receiving release notes by selecting 'Me' then 'Preferences' on the Admin screen and unticking 'Receive Release Notes'. **NOTE**, please ensure that at least one administrator of the system in your company keeps this preference ticked to continue to receive updates!
- **T&A Shift Patterns Enhancements**  
**Additional Fields** – When adding a pattern to allow for more 'Activity' lines to be seen on the grid some of the configuration fields are now under 'Additional Fields'. There is a new setting, 'Start Date (optional)' where the first date a pattern will start from can be set. This can be used for Fixed Rotation shifts where every employee on the pattern works the same shifts. The day an employee starts on the pattern will not change the pattern of the shifts. See example below in Pattern Preview.

**Block Mode** - Previously patterns were only shown in a single grid line of days. Now when adding a pattern 'Block View' can be ticked and rows added to show in the example below to give a grid block view of a 7-week pattern.

Patterns Profile: Activities

Block View  Days per Block 7 Add or Subtract Rows

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Days 01-07	07:30-16:30 Field Se...						
Days 08-14	09:30-18:30 Field Se...	09:30-18:30 Field Se...	09:30-18:30 Field Se...	09:30-18:30 Field Se...			11:30-20:30 Field Se...
Days 15-21	11:30-20:30 Field Se...	11:30-20:30 Field Se...	11:30-20:30 Field Se...			15:00-23:00 Field S...	15:00-23:00 Field S...
Days 22-28	15:00-23:00 Field S...	02:30			17:00-02:00 Field Se...	17:00-02:00 Field Se...	17:00-02:00 Field Se...
Days 29-35					22:00-07:00 Field Se...	22:00-07:00 Field Se...	22:00-07:00 Field Se...
Days 36-42		22:00-07:00 Field Se...					06:00-14:00 Field S...
Days 43-49	06:00-14:00 Field S...	06:00-14:00 Field S...	06:00-14:00 Field S...	06:00-14:00 Field S...			08:00-16:00 Field S...
Days 50-56	08:00-16:00 Field S...	08:00-16:00 Field S...	08:00-16:00 Field S...			10:00-18:00 Field S...	10:00-18:00 Field S...

Name \*  
Field Service 7 week rota

Additional Fields

**Pattern Preview**- When applying a pattern, a preview can now be displayed, and the start date can be applied by clicking on a date in the preview as shown in the example below.

Apply Pattern

Target: Ian Jones

Pattern: Field Service 7 week rota

From \* 7 Nov 2022 To \* Start Day 15

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Days 01-07	07:30-16:30 Field Service ...						
Days 08-14	09:30-18:30 Field Service ...	09:30-18:30 Field Service ...	09:30-18:30 Field Service ...	09:30-18:30 Field Service ...			11:30-20:30 Field Service ...
Days 15-21	11:30-20:30 Field Service ...	11:30-20:30 Field Service ...	11:30-20:30 Field Service ...			15:00-23:00 Field Service ...	15:00-23:00 Field Service ...
Days 22-28	15:00-23:00 Field Service ...			17:00-02:00 Field Service ...	17:00-02:00 Field Service ...	17:00-02:00 Field Service ...	17:00-02:00 Field Service ...
Days 29-35				22:00-07:00 Field Service ...	22:00-07:00 Field Service ...	22:00-07:00 Field Service ...	22:00-07:00 Field Service ...
Days 36-42	22:00-07:00 Field Service ...						06:00-14:00 Field Service ...
Days 43-49	06:00-14:00 Field Service ...	06:00-14:00 Field Service ...	06:00-14:00 Field Service ...	06:00-14:00 Field Service ...			08:00-16:00 Field Service ...
Days 50-56	08:00-16:00 Field Service ...	08:00-16:00 Field Service ...	08:00-16:00 Field Service ...			10:00-18:00 Field Service ...	10:00-18:00 Field Service ...
Days 57-63	10:00-18:00 Field Service ...	10:00-18:00 Field Service ...	10:00-18:00 Field Service ...				

- **The 'Assignment Date Changes'** screen – is a facility for Administrators to display original and amended dates on employee jobs, (assignments). Retrospective changes can also be displayed, so for example, if an assignment is end dated on a date after the actual end date this can now be displayed as well as the migration status to another new assignment. When employee information from external systems is updated via an API, (Application Programming Interface) the source column will show API rather than User. Access to this screen is allowed by setting the permission 'Assignment Audit (Date Changes)'. *(For T&A)*.
- **Added flexibility for controlling changes of balances on the history screen and who can adjust them.** Against balance types there is a new checkbox 'Allow Direct Edits to Balance Values (by double-clicking on the history screen)'. This defaults to on.  
There are two new permissions, 'Directly Edit Balance Values (where allowed on the balance)', defaults to on and 'Directly Edit Balance Values (where not allowed on the balance)', defaults to off.  
This allows an administrator flexibility to select which balances can adjusted on the history screen and which employees have permission to do so. Should an administrator be required to adjust a balance which has the checkbox 'Allow Direct Edits to Balance Values' off they will need to have the 'Directly Edit Balance Values (where not allowed on the balance)' permission set on. *(For T&A)*.
- **Roster Change Notifications** now have more information with details of who made the change to the shift and what the change is, for example a different start/end time. *(For T&A)*.
- There is a new client setting, '**Requirements - minimum percentage of a shift** that an Employee must be present for to fulfil a Requirement'. The default is 100%. *(For T&A)*.
- **Long overnight shifts have had the cut off time increased** so that if an out clocking is up to 2 hours and 59 minutes after, for example a 12 hour shift the 'unexpected presence' exception can be authorised. This allows for example authorised overtime to be linked to the date the overnight shift started on. *(For T&A)*.
- **Open shifts** can now be cancelled by a manager or by the person requesting the open shift unless it has already been assigned to another person. *(For T&A)*.
- **There is a new client setting that allows** payroll periods to be Auto unapproved when performing assignment data migration. This would need to be discussed with and enabled by HFX. *(For T&A)*.
- The **notifications for declining swap requests** when sent to the person declining the swap previously referred to 'your colleague' rather than 'you'. *(For T&A)*.
- Additional tables have had the ability to export them including Budget types, Budget values, Costing rules, Filter profiles and Roster terms. *(For T&A)*. Also, on Date Cycles. *(For Flex, T&A and Access Control)*.
- **Rehires** - For customers who have experienced difficulties importing a rehired person over the API when their previous username/email address has not been updated to add Leaver for example there is a new configuration setting for the API, 'Automatically re-hire returning employee'. Please speak to Support to enable this.

### Resolved Issues

- On the Home page of the Self-Service screen there was a large gap between the logging in person's name and the top of the information panels.
- The Flex working pattern limit has been increased from 6 to 10 weeks.

### Resolved T&A Specific Issues

How managers can see data for employees indirectly reporting to them or if they have the permission to view employees in their own Group, has changed.

Viewing indirectly reporting employee will only be shown if their manager has an active assignment reporting to the manager viewing on the date they are logged into the system, it is not dependant on the date range of the information being viewed.

If a manager has permission to view employees in the same group, they will only be able to view employees in that group if they are a member of that group on the day they are logged into the system, it is not dependant on the date range of the information being viewed.

**Displaying the Planning Staff Roster screen in Simple Mode** had two issues which have been resolved.

1. Overtime shifts did not show the start and end times.
2. The Find Cover for a shift was not working.