

Workforce Management Release Notes for Version 5.2.6

Scheduled for Tuesday 18th April 2023

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

These release notes have been sent to you as you are a designated administrator on the system.

New Features and Improvements

- Absences can be created more simply on the Roster Planning screen by selecting the absence period type on the icon tool bar and then using the arrow select to double click on a presence period, an absence period with the same times will be automatically generated. The presence period type will need 'Enable quick override on Planning screen' option set. T&A
- The Payroll Approval screen now has additional columns for the details of dates a payroll has been approved and who by. T&A
- For T&A customers there is a new Manage Balances screen under the Employees tab showing a selectable daily balance each day for employees, over the date range selected. The total is shown and totals for other selected T&A balances for that period.
- T&A Exceptions can now be multi accepted and authorised in one go, for example for a group of employees who work past shift end time and need overtime authorising.

Staff Exceptions

Start date: << < 1 Mar 2023 > >> End date: << < 7 Apr 2023 > >> My Staff Only:

Show: Unacknowledged Acknowledged Update Exceptions: **Select All** Select None Perform Actions Authorise

Profile: <none> Save as... Save Delete

Select	Status	Actions	Employee	Post	Date	Category	Exception	Payroll Group	User Group	Location
<input type="checkbox"/>	UNACKNOWLEDGED	✓	Hamish McDonald [712893]	Field Service	23 Mar 2023	Departed Late	Departed Late. Departure expected at 17:00 left at 18:00	Weekly	Customer Service	England-Hertfordshire-Stevenage
<input type="checkbox"/>	UNACKNOWLEDGED	✓	Cristos Kyriakou [336255]	Field Service	23 Mar 2023	Departed Late	Departed Late. Departure expected at 17:00 left at 18:00	Weekly	Customer Service	England-Hertfordshire-North Hert
<input type="checkbox"/>	UNACKNOWLEDGED	✓	Declan Brady [123684]	Field Service	23 Mar 2023	Departed Late	Departed Late. Departure expected at 17:00 left at 18:00	Weekly	Customer Service	England-Hertfordshire-North Hert

Showing 3 items Export table: Excel CSV CSV with BOM PDF

Authorise Exceptions

Hamish McDonald [712893]: Departed Late. Departure expected at 17:00 left at 18:00 - 23 Mar 2023
 Cristos Kyriakou [336255]: Departed Late. Departure expected at 17:00 left at 18:00 - 23 Mar 2023
 Declan Brady [123684]: Departed Late. Departure expected at 17:00 left at 18:00 - 23 Mar 2023

Period Type: Overtime For ad hoc OT

Attributes: Activity Company Management

Save Cancel

- New for Delegation, the manager can select who system messages are sent to, for example the manager and their representative or just the representative.

During the delegation period, many messages for the original user will be redirected to the representative and will not be sent to the original user. This applies to all relevant media types (Email, ESS, SMS) depending on client license, configuration and user preference.

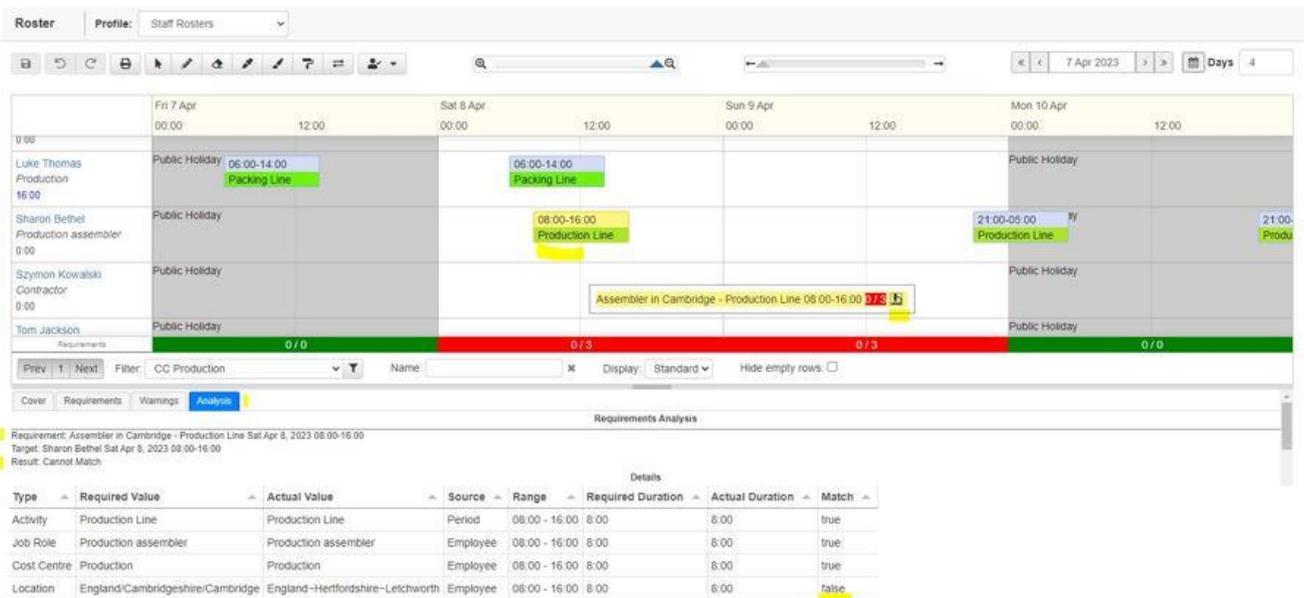
The following message categories will be redirected: **Requests and Exceptions Alerts, Roster Change Notifications, Open Shifts, Absence and Adjustment Request Workflows, Scheduled Reports.**

Other messages will be sent to the original user as normal (e.g. 2FA codes, password reset links).

- If a delegated user logs in unexpectedly during the date range, a warning message is displayed to show where communications are being sent.

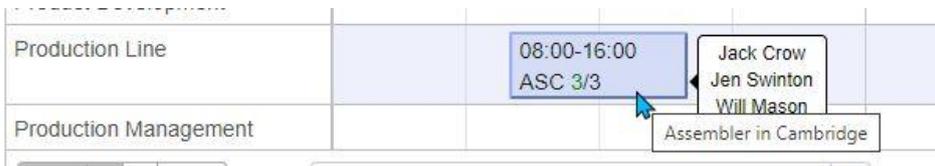


- Clicking on the microscope tool in the Requirements context menu and then clicking on a shift will analyse the shift to check if the criteria match the requirement. On the example below the new Analysis tab shows that the requirement location is not matched as it shows False in the Match column. T&A



Type	Required Value	Actual Value	Source	Range	Required Duration	Actual Duration	Match
Activity	Production Line	Production Line	Period	08:00 - 16:00	8:00	8:00	true
Job Role	Production assembler	Production assembler	Employee	08:00 - 16:00	8:00	8:00	true
Cost Centre	Production	Production	Employee	08:00 - 16:00	8:00	8:00	true
Location	England/Cambridgeshire/Cambridge	England-Hertfordshire-Letchworth	Employee	08:00 - 16:00	8:00	8:00	false

- On the Requirements screen the employees matched to the requirement are displayed by hovering over the right-hand side. T&A



- When Requirements use an attribute, for example location, this can be displayed when selecting the Requirement context menu on the Staff Roster screen. T&A



- The requirement context menu, shown above, can be clicked on, and moved to avoid obscuring roster screen elements and wrapping menu items if it on the right-hand side of the roster screen. T&A
- Absence Requirements – can now match default attributes on assignments, for example by location. T&A

- When adding Roster periods or patterns, required attributes for example, location or cost centre can now be populated from the employee's assignment details. *T&A*
- The new Auto Save mode can speed up adding roster periods. To enable it right click in the roster screen grid to display the options list and select 'Enable Auto Save' at the bottom of the list. *T&A*
- Flex employees will be able to see a new TOIL tab in their Self-Service calendars showing their TOIL balance for each day. *Flex*
- Clawback can now be implemented for employees with varying target hours across pay periods. *T&A*
- The client settings have a new Communications option for selecting how categories of system notifications are sent e.g., by email, SMS or Self-Service or a combination of these.
- The login link on email alerts to managers for requests will now navigate directly to the request after login.
- In Bulk Edit there is a new feature for adding rotating roster shift patterns and applying them incrementally to the employees in the selection list. For the example shown below, all the employees use the same shift pattern and on the same start date employee 1 is on week 1, employee 2 on week 2 and so on. *T&A*

Lauren Green -- Field Service
 Lucy Appleton -- Field Service
 Molly Duncan -- Field Service
 Rick Strong -- Field Service

Pattern

Field Service 7 week rota

From * 5 Jun 2023 To

Start Rotation

Apply Incrementally

Start Day in Pattern *

1

Cycle

<none>

Override existing Patterns

Save Cancel

Roster	Profile: Staff Rosters													
	Mon 5 Jun		Tue 6 Jun		Wed 7 Jun		Thu 8 Jun		Fri 9 Jun		Sat 10 Jun		Sun 11 Jun	
	00:00	12:00	00:00	12:00	00:00	12:00	00:00	12:00	00:00	12:00	00:00	12:00	00:00	12:00
Lauren Green Field Service 45.00		07:30-16:3 Field S...		07:30-16:3 Field S...		07:30-16:3 Field S...		07:30-16:3 Field S...		07:30-16:3 Field S...				
Lucy Appleton Field Service 45.00		09:30-18:3 Field S...		09:30-18:3 Field S...		09:30-18:3 Field S...		09:30-18:3 Field S...						11:30-20:3 Field S...
Molly Duncan Senior Field Service Engineer 0.00		06:00-14: Field ...		06:00-14: Field ...		06:00-14: Field ...		06:00-14: Field ...						08:00-16: Field ...
Rick Strong Field Service 0.00			15:00-23: Field ...						17:00-02:0 Field S...		17:00-02:0 Field S...		17:00-02:0 Field S...	17:00-0: Field S...
Requirements	0/0		0/0		0/0		0/0		0/0		0/0		0/0	

- To avoid duplication employees requesting leave or adjustments will now see information about other requests they have made for the same date and if they have been accepted or are pending.

You have a pending Annual Leave request on 18 Apr 2023.

Request Type *
Absence / Adjustment

Absence / Adjustment Reason *
Annual Leave

Start Date * 18 Apr 2023

End Date * 18 Apr 2023

- Adjustment reasons can now be copied, and the resulting copy be modified.
- For customers where most shifts or overtime are the same length there is a new option in the Period types, 'Default Length' e.g., could set 7:30 for presence periods and 1:00 for overtime. *T&A*
- Hierarchy items e.g., Activity now include an 'Active Until' date which can be used to control their display on the Roster screen. This is useful for short term activities e.g., an exhibition. *T&A*
- There is a new Employee Constraints screen, displaying employees and Constraint rules and profiles applied to them. *T&A*
- Roster Constraint rules can now filter on overtime and absence as well as presence. *T&A*
- Roster Constraints rules now include an option to 'Extend On'. This is used to increase the length of a reference period, to take into account an absence for example for the Working Time Directive. A Constraint filter will need to be added to be able to use the new option in the Constraint rules. *T&A*
- Availabilities now have a colour attribute. *T&A*
- There is a new client setting, 'Annual Leave Reports -- include information from previous sequential assignments if current assignment does not cover the current leave year'. This is off as a default. The setting is also to show details in Self-Service.
- The 'Auto Manager' feature has been renamed to 'AI Manager'. *T&A*
- Annual Leave Balance Entitlement Schemes have been added to Annual Leave Detail & Summary reports.
- When adding T&A permission profiles there is a new Profile Type selection for Standard or Operational. The Operational profile is used for Operational Permissions. These are restricted to three permissions View Employee History, View Time Based Roster, and Edit Time Based Requirements. *T&A*

Name *
Manager Operational Permissions

Profile type
Operational

A profile marked as "Operational" is for use on the "Operational Permissions" page only. This contrasts with "Standard" profiles which are those used throughout the product and linked to a user login record.

"Operational Permissions" grant managers limited access to view rosters and histories of staff belonging to a particular location. This allows managers to view shifts and clockings for staff on temporary deployments, where standard system security (based on the line management chain) would not ordinarily permit these staff to be seen.

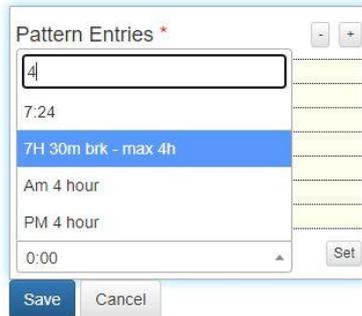
Operational profiles are limited to a small set of permissions -- for further information please refer to the "Operational Permissions" page itself.

Please select which permissions belong to this profile

Permission	View	Add	Edit	Delete	Action
Employee history	<input checked="" type="checkbox"/>				
Time Based Rosters	<input checked="" type="checkbox"/>				
Time Based Requirements			<input checked="" type="checkbox"/>		

- The Client settings page now has related settings grouped together.

- For setting up/editing Flexi Working Patterns Adding there is now a quick search field of Daily Programmes rather than having to scroll through the whole list. *Flex*



- When adding/editing a T&A pattern rather than having to scroll through Activities in the left-hand column if there are more than shown in the display, there is a new box called 'Find' at the bottom of the column which will auto scroll the display grid to the activity. *T&A*
- There is a new information tip for scheduled reports, see below.

i The report will not start gathering data before the time entered. Please enter a time at which the data you are reporting on is known to be up to date.

For example if your staff work Monday-Friday and you wish to view summary information on Monday morning for the previous week, the data will have been calculated by Saturday morning.

Time taken to run a report (and hence time at which your report will be made available to view) depends on a number of factors. For the example above, to ensure you get your report when you need it we would recommend running the report on Saturday afternoon so it can be viewed at 9am on Monday.

- Date tracking now includes 4 additional Flex related fields, Deduct Contracted Hours at Period End, Personal Cutback Limits, Period Credit Limit Override and Period Debit Limit Override. *Flex*
- Password reset emails now include a line at the bottom with the timestamp the email was sent.
- A new Roster term has been added to support non-clocking employees. If there are no clockings on a day, they will be assumed present for their entire presence shift and any overtime periods on the day, except any times covered by authorised absence periods. If there is one or more clocking on the day, this is not done and the clockings are used to signify periods of presence as for a normal employee. *T&A*

Other Improvements

- **IMPORTANT - Release Notes Change** - From the last software release the way release notes are sent out has changed. Release notes are 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!

Resolved Issues

- On clock change days only exception times were displayed incorrectly when displaying and authorising an exception.
- Some employees with multiple assignments were not ordered by date in the employee record.
- For the Auto Manager, (now AI) rule - Shift Swaps "two shift match on" will display all possible attributes. Grade, Organisation and Job Role have been added. *T&A*
- The Roster Change notification email sent to an employee contained their name unnecessarily *T&A*
- Additional contacts for an employee can be saved in the Edit Employee screen but could not be opened.
- On the Planning Staff Roster screen, on the Name filter selecting x will now clear the name and reload the screen. *T&A*
- Previously a manager with permissions for Staff Exceptions View and Edit ticked were not allowed access to acknowledge exceptions in the history screen.
- Exported reports with clockings were displaying unusual characters due to the way Excel was interpreting them. A new export option 'CSV with BOM' has been added for this. BOM stands for byte order mark.
- When the 'find cover' option was used the Shift assigned to a person was not shown automatically if they were not on same roster pagination page as the person being covered for. *T&A*
- In the All Employees screen when an assignment has no active managers, the Managers column now shows '(not assigned)' to allow filtering.