Workforce Management Release Notes for Version 5.5.2

Scheduled for Tuesday 6th February 2024

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

During the update, the Workforce Management Manager's Administration screen and the Employee Self Service screen will not be available.

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

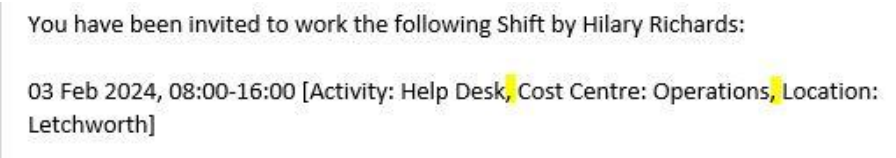
Administrators can opt out of receiving release notes by selecting 'Me' then 'Preferences'. on the Admin screen and unticking 'Receive Release Notes'.

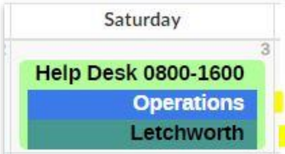
New Features and Improvements

Changes to Open Shifts In Roster Screen *T&A*

Open Shifts are used to re-assign shifts or create shifts which need assigning.

Additional attributes configured for Open Shifts are now displayed in the invitation email and in the Self-Service Calendar view. The examples below show the additional configured attributes of Location and Cost Centre.

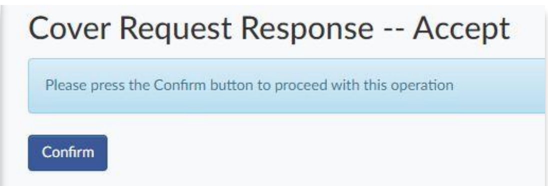


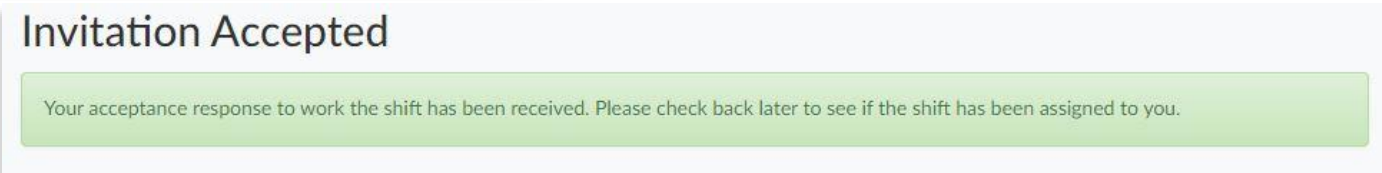


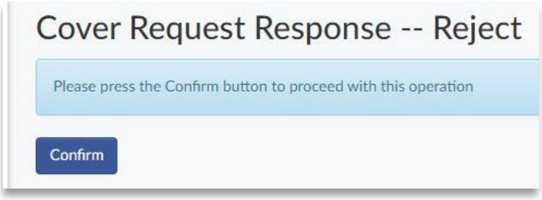
Custom Fields can now be included in the Open Shift invitation emails. An example of a custom field could be the contact details of a person at a location. *To request any changes please talk to your HFX Project Manager.*

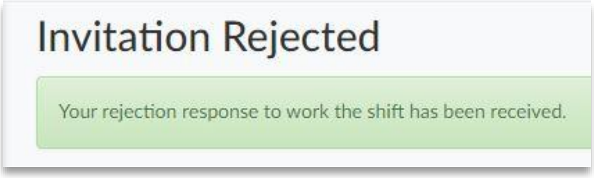
An **Open Shift Icon** is displayed on a shift once an Open Shift has been created for it. This is displayed until the Open Shift has been allocated or is deleted.

A new **Cover Request Response** Screen is displayed when the accept or reject links are clicked on the Open Shift Invitation to Work emails. To accept or reject the invitation the 'Confirm' button needs to be selected. When the Confirm button is selected a message is displayed to confirm it has been received.

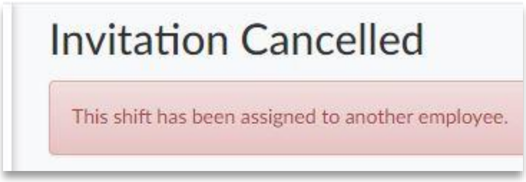








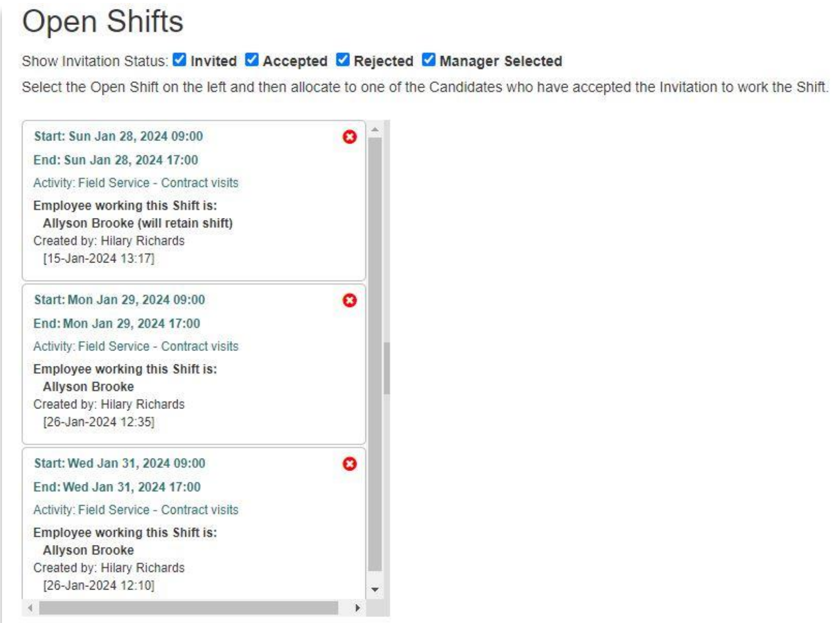
When the Open Shift has already been assigned and another person clicks on the Accept link in their invitation email, the Cover Request Response Accept screen is displayed, when Confirm button is clicked a screen to show the invitation has been cancelled will be displayed.



Improvements to the Open Shifts Screen

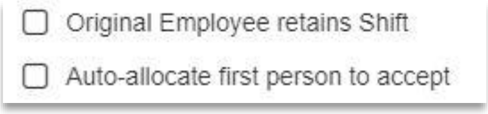
The Open Shifts Menu now displays a list of Open Shifts in the date order and time of the shifts rather than in the created date order. The Open Shift closest to today's date is displayed at the top.

The start and end times of each Open Shift are now displayed on the first line of each open shift information box, who created it and when is now at the bottom.



HFX Ltd, Solutions House, Dunham's Lane, Letchworth, Hertfordshire. SG6 1BE

Auto Allocation of an Open Shift can be selected to be allocated to the 1st person to accept the invitation, (by email link or on Self-Service Open Shifts tab). On the Open Shift: Invite Employees to work this Roster Period there is a new tick box, 'Auto-allocate first person to accept'. The default is for this box to be off.

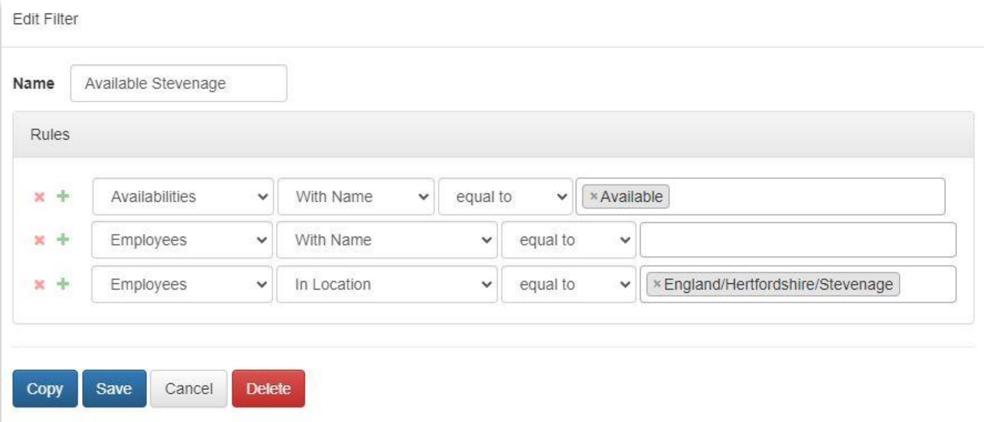


There are two new client settings to control the default for the new Auto-allocate box and the existing 'Original Employee retains Shift' box. These are,

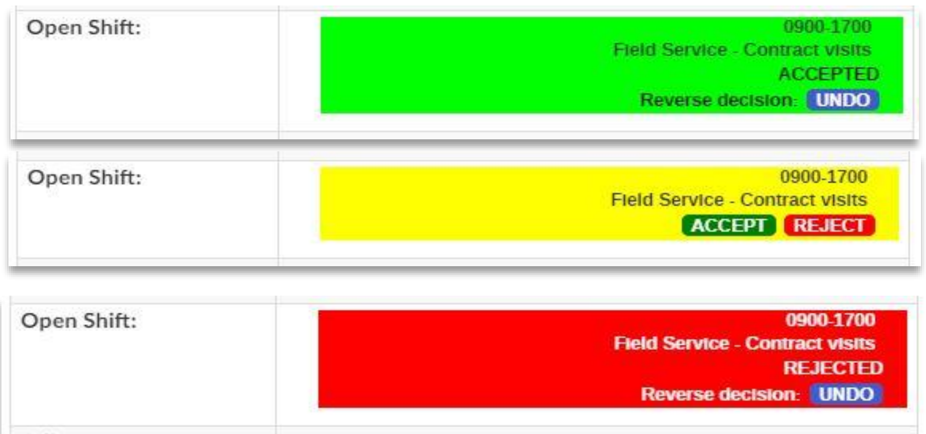
Open Shifts -- default value for "Auto-allocate first person to accept" on create dialog (manager can amend), off as default.
Open Shifts -- default value for "Original Employee retains Shift" on create dialog (manager can amend), off as default.

Open Shifts Invitations & Availability

When creating an Open Shift, the invitation can be sent to employees that have marked themselves up as being Available in their Self-Service calendar on the Availability tab. The Availability filter should be the only one selected from the list of filters on the invitation. An example of a filter for Availability by location is shown below.



Employees can Change the Status of an Open Shift – before a manager allocates an Open Shift an employee can change their mind and the status of their response to the invitation from their Self-Service calendar. On the Open Shifts tab accepted invitations are shown in green and rejected in red. Clicking on the 'UNDO' button allows the status to be changed by selecting the ACCEPT or REJECT buttons. The status can be changed again up until the manager allocates the Open Shift to an employee.



Open Shifts and Operational Permissions

Managers with Operational Permissions to view employees not in their reporting chain, now have access to see all Open Shift invitees e.g. by location and assign Open Shifts to them.

Other Changes

The **Client Links** page is used to configure links to navigate to other web addresses e.g. your company website. This has a new setting 'Open in new Tab' . When this is enabled, the link opens in a new browser tab or if not enabled will navigate to the URL address in the same browser tab. *T&A & Flex*

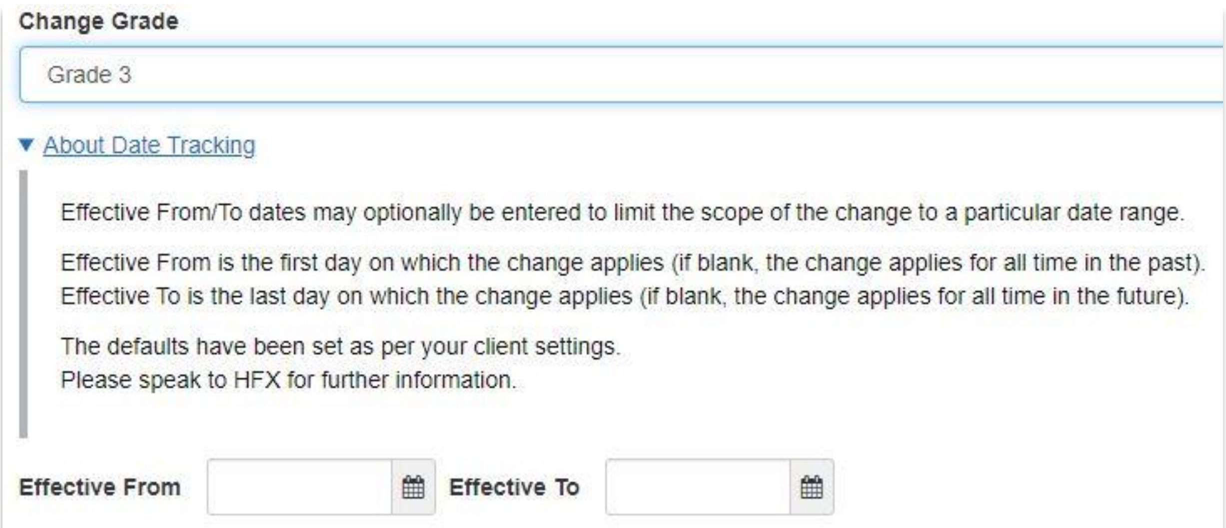
Evaluate Requirement is a new selection shown when right clicking on a Requirements period. This will immediately check if the employee(s) matched to the requirement are still fulfilling the requirement conditions and if not remove them. This could be used when an assignment is end dated. However, requirements are also automatically checked and updated every 5 minutes for any changes to assignments that mean the requirement is no longer fulfilled. *T&A*

Self-Service Long Name Wrap – against My Account and then Preferences there is a new setting 'Wrap Long Names.' Ticking this will wrap long hierarchy attributes e.g. locations. *T&A & Flex*

New Red error message 'Sorry the system was not able to complete this operation' - Unfortunately, it does happen to us as well! When the HFX Workforce Management software cannot complete a process and produces an exception error, a red error message is shown with encrypted details of the stack trace. Please send HFX Support the encrypted information by copying and pasting after selecting the Toggle Advanced Information button or by using the download option and include any additional information suggested on the page. *T&A & Flex*

All Employees Screen Changes - The 'Source' column has been renamed to 'User Source' and a new column has been added called 'Job Source'. These columns show how a User (An employee without a job role) and a Job against an employee have been added to the database. When the User or the Job is added by for example by the Client Administrator typing in the details the columns will show User. When the information is supplied over an API, (Application Programming Interface) from, for example an HR system the columns will show API. *T&A & Flex*

Bulk Editing with Date Tracked Fields - For customers using Date Tracking, when bulk editing date tracked assignment fields, e.g. Location, Organisation, User Group, Grade, Job Role, and Contract Group the relevant dates for the field can be changed as shown in the text below. *T&A*



Resolved Issues

Assigned Open shifts were displayed in Self-Service even though the actual assigned shift had been deleted from the roster. *T&A*

Payroll approved locked periods were editable on different roster views, e.g. if not grouped by assignment. *T&A*

Editing an employee to Auto-generate a PIN caused an error screen. *T&A & Flex*

Occasionally when applying a pattern users would see a timeout error from the Cloud security software. The patterns were still applied. The processing time for pattern application has been improved for this release. *T&A*

Adding Additional Contacts from the View Client screen caused an error screen. *T&A, Flex & Access Control*

The Authorise option in the exceptions screen did not work if the user only had 1 period type for Overtime exceptions. *T&A*

The Annual Leave Detail report showed an incorrect starting balance for the year following an adjustment to increase annual leave balance on the first day of the previous year. *T&A & Flex*

For Flex customers searching on the Staff Roster screen by employee name gave an error screen. *Flex*

Incorrect deletions and addition of adjustments when overnight shifts were created on days with full day absence adjustments. *T&A*

For one specific workflow Bulk Adding roster periods sometimes put incorrect attribute times which prevented correct calculation of hours. *T&A*

In reports the 'Working Pattern' column wasn't available for T&A clients. *T&A*