

# Workforce Management Release Notes for Version 5.6.6

Scheduled for Tuesday 21st May 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

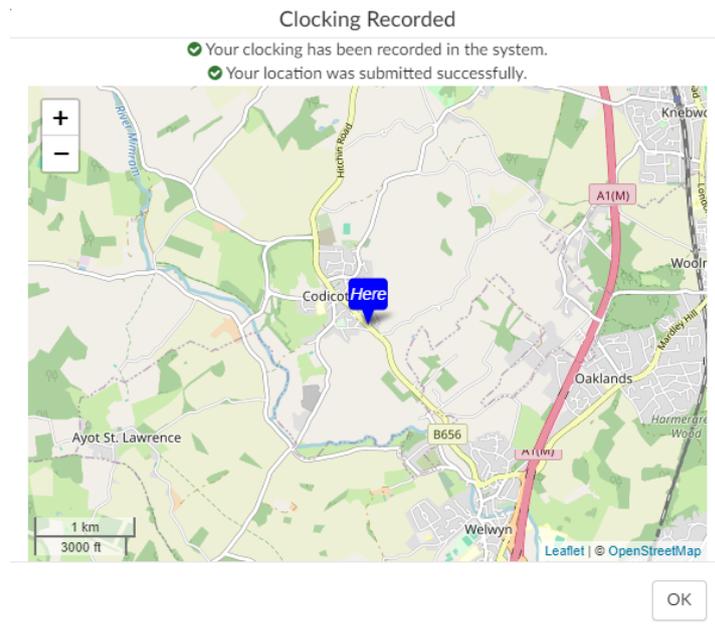
### **Geo-location of Self-Service Clockings** *T&A & Flex*

When employees clock into HFX Workforce Management on Self Service their current location can now be captured. This new feature requires the Geo-location license, and employees will need the permission 'Self-clocking in Employee Self Service records current geo-location if available' set.

When employees clock into Self-Service via a computer or mobile, they will first be asked to allow their location to be known, on clocking will see a message saying their clocking has been recorded and location submitted. A map is also displayed as shown below.

Employees can view the history of their geo-location clockings by clicking on the pin icon shown on the Clockings tab of the Self-Service calendar.

For Managers, the pin icon will be displayed in the 'Info' column of the history screen of the employee.



*Please contact your account manager if you are interested in this feature.*

## Realtime Employee Requests can be Accept or Declined from Email Notifications *T&A & Flex*

The email notification now includes links to approve or decline requests as well as the existing link to log into the app to deal with a request. When clicking on either of the new links a confirmation page is opened. Selecting the Confirm button will then display that the request has been accepted or declined.

### Accept Employee Request

Please press the Confirm button to proceed with this operation

**Employee:** Xavier Laurent (Sales Executive)  
**Type:** Absence  
**Date(s):** 20 May 2024  
**Detail:** Annual Leave (Full Day)

©2015 - 2024 by hfx Ltd. All rights reserved.

### Employee Request Accepted.

Your accept response was successfully processed.

©2015 - 2024 by hfx Ltd. All rights reserved.

### Decline Employee Request

Please press the Confirm button to proceed with this operation

**Employee:** Xavier Laurent (Sales Executive)  
**Type:** Absence  
**Date(s):** 20 May 2024  
**Detail:** Annual Leave (Full Day)

©2015 - 2024 by hfx Ltd. All rights reserved.

### Employee Request Declined.

Your decline response was successfully processed.

©2015 - 2024 by hfx Ltd. All rights reserved.

When a person may have more than one manager, if another manager has dealt with the request, selecting Confirm will show that the request has already been dealt with.

There is a new client setting, under the Communications Options 'Allow users to enable accept/decline links in realtime request notifications' which is on by default. A new user Alert Preference 'Include accept/decline links in realtime employee request notifications' is on by default.

## Staff Roster Planning Screen *T&A & Flex*

More information has been added to the planning screen in the left-hand columns. The columns added are Organisation, Contract Group, Payroll Group and User Group. The selected columns can be changed by right clicking on the left-hand side of the grid, ticking which columns are required and saving the changes. Having all the columns on maybe a bit much!

Roster											Profile: Staff Rosters							
Name	Job Role	Location	Grade	Cost Centre	Organisation	Contract Group	Payroll Group	User Group	Planned Hours	Contracted Hours	Cost	May 2024						
Aaron Feszling	Production Supervisor	Cambridge	Grade 2	Production	Production	Test8	Weekly	Test 2	38.00	38.00	£586.50	6	7	8	9	10	11	12
												Public Holiday	21:00-07:00 Production ...	21:00-07:00 Production ...	21:00-07:00 Production ...	21:00-05:00 Production ...		

The **Simple View** of the Roster screen will now display a full day's absence as well as the planned shift. Previously if the absence was a full day only the absence was displayed.

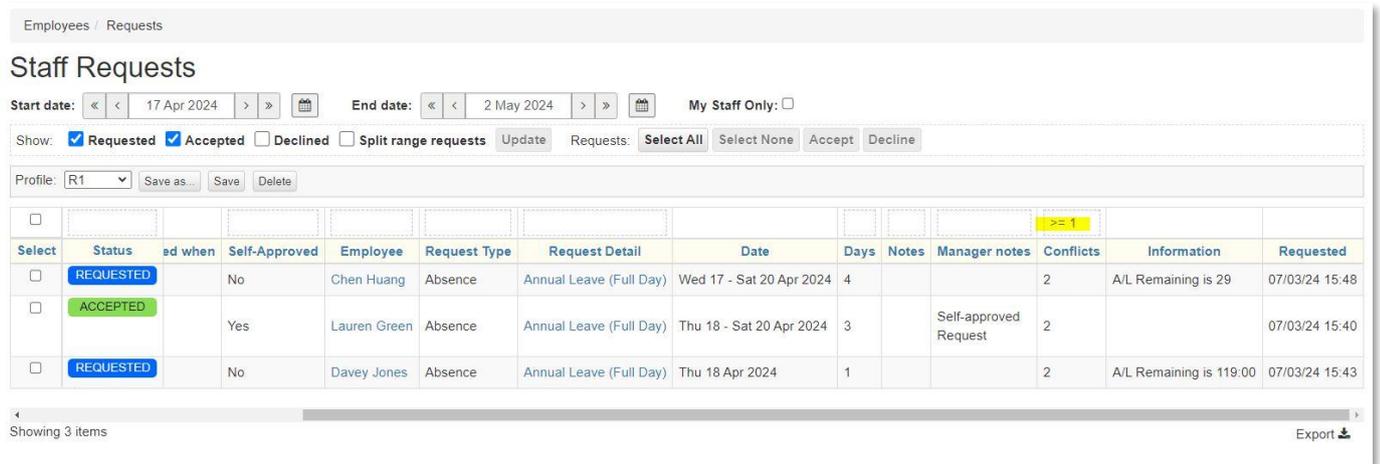
Roster											Profile: Staff Rosters							
Name	March 2024																	
Rick Strong	11	12	13	14	15	16	17											
	10:00-18:00 Field Service - Contract visits	11:30-20:30 Field Service - Contract visits																
	AM Annual Leave	PM Annual Leave	Full Annual Leave	13:00-15:00 Annual Leave														

Prev 1 Next Filter: All Staff Name: Rick Strong Display: Simple Hide empty rows:

## New Option for the Staff Requests screen *T&A & Flex*

To help give managers more information when approving employee requests the Conflicts column has a new option to count already approved requests, including self-approved ones. To use this a new User Preference 'Requests Screen: Include accepted absence requests in "Conflicts" count' should be set on. The Accepted box should also be ticked on the screen.

When the new option is used the Staff Requests can be filtered to show when there is more than 1 conflict by filtering the Conflicts column using '>=1', see the example below.



Employees / Requests

### Staff Requests

Start date: 17 Apr 2024 End date: 2 May 2024 My Staff Only:

Show:  Requested  Accepted  Declined  Split range requests Update Requests:

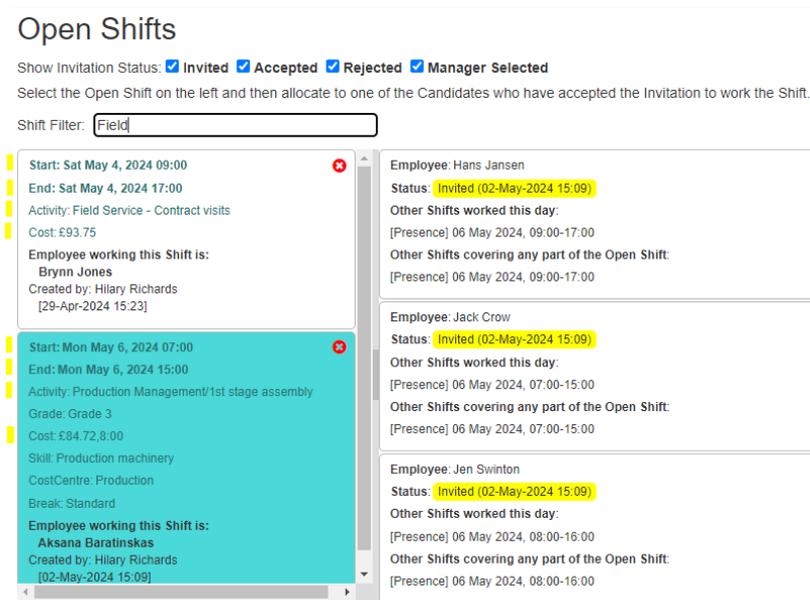
Profile: R1 Save as... Save Delete

Select	Status	Requested when	Self-Approved	Employee	Request Type	Request Detail	Date	Days	Notes	Manager notes	Conflicts	Information	Requested
<input type="checkbox"/>	REQUESTED		No	Chen Huang	Absence	Annual Leave (Full Day)	Wed 17 - Sat 20 Apr 2024	4			2	A/L Remaining is 29	07/03/24 15:48
<input type="checkbox"/>	ACCEPTED		Yes	Lauren Green	Absence	Annual Leave (Full Day)	Thu 18 - Sat 20 Apr 2024	3		Self-approved Request	2		07/03/24 15:40
<input type="checkbox"/>	REQUESTED		No	Davey Jones	Absence	Annual Leave (Full Day)	Thu 18 Apr 2024	1			2	A/L Remaining is 119:00	07/03/24 15:43

Showing 3 items Export

## The Open Shift Screen has a New Search Facility *T&A*

The Shift Filter box allows free text searching in the shift fields; Start, End, Activity and Cost of the Open shifts shown on the page. In the example below, searching for the Activity 'Field' only the first of the two Open Shifts shown below will be displayed.



### Open Shifts

Show Invitation Status:  Invited  Accepted  Rejected  Manager Selected

Select the Open Shift on the left and then allocate to one of the Candidates who have accepted the Invitation to work the Shift.

Shift Filter:

**Start:** Sat May 4, 2024 09:00

**End:** Sat May 4, 2024 17:00

**Activity:** Field Service - Contract visits

**Cost:** £93.75

**Employee working this Shift is:**  
Brynn Jones  
Created by: Hilary Richards [29-Apr-2024 15:23]

**Employee:** Hans Jansen

**Status:** Invited (02-May-2024 15:09)

**Other Shifts worked this day:**  
[Presence] 06 May 2024, 09:00-17:00

**Other Shifts covering any part of the Open Shift:**  
[Presence] 06 May 2024, 09:00-17:00

**Start:** Mon May 6, 2024 07:00

**End:** Mon May 6, 2024 15:00

**Activity:** Production Management/1st stage assembly

**Grade:** Grade 3

**Cost:** £84.72,8:00

**Skill:** Production machinery

**CostCentre:** Production

**Break:** Standard

**Employee working this Shift is:**  
Aksana Baratinskas  
Created by: Hilary Richards [02-May-2024 15:09]

**Employee:** Jack Crow

**Status:** Invited (02-May-2024 15:09)

**Other Shifts worked this day:**  
[Presence] 06 May 2024, 07:00-15:00

**Other Shifts covering any part of the Open Shift:**  
[Presence] 06 May 2024, 07:00-15:00

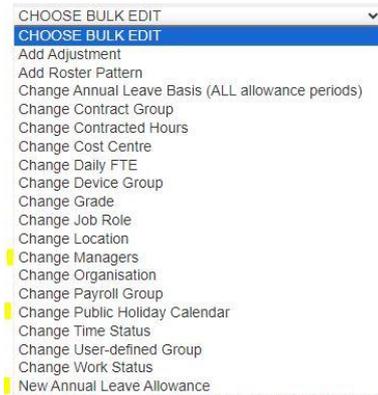
**Employee:** Jen Swinton

**Status:** Invited (02-May-2024 15:09)

**Other Shifts worked this day:**  
[Presence] 06 May 2024, 08:00-16:00

**Other Shifts covering any part of the Open Shift:**  
[Presence] 06 May 2024, 08:00-16:00

## Additions to the Bulk Edit Screen *T&A & Flex*

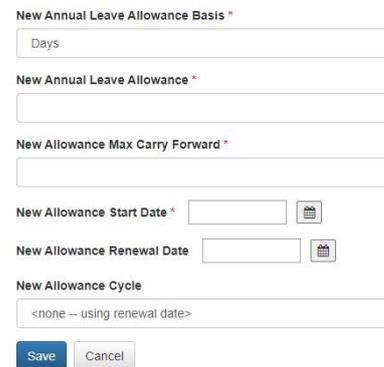


On the Bulk Edit screen, on the the All Employees screen there are two new additions.

### Change Public Holiday Calendar and New Annual Leave Allowance.

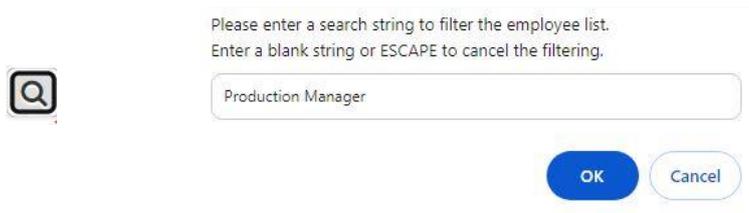
The New Annual Leave Allowance allows a group of employees to have their Annual Leave allowance changed rather than having it edit the allowance against each job/assignment. The previous annual leave entitlement are automatically truncated on the day before the new one starts. Another option is to enter zero in the New Annual Leave Allowance field which only truncates the allowance without adding any new allowance.

*(Note, this feature is not for use with the Advanced Balance Entitlements license).*



The **Change Manager** option in Bulk Edit – has a new search tool.

Select which employees will have their assignments updated to add and now rather than scrolling through the list of employees, selecting the magnifying glass icon, allows a search string to be entered, e.g. job role to narrow the list down for selection.



## Line wrap on Long Balance Names *T&A*

Long Balance names can now be line wrapped by entering a double pipe '||' where the wrap should happen. For customers who already have the pipe character set in the User Preference Delimiter character for the multi-create of config items, the escape character set in the user preference 'Delimiter character for multi-create of config items' should use this character when setting a wrap in along balance name before each pipe character e.g. Working at\\|customer site. Note – only add the wrap in the Name field of the balance not the Description field.

**T&A Patterns can now Include Overtime Periods** *T&A*

For organisations that forward plan overtime for regular times /days, Time & Attendance patterns can now, with configuration changes, include overtime.

*Please contact your account manager if you are interested in this feature.*

**Accepted Absence Requests Included in Data Migration** *T&A & Flex*

The feature, Migration of Employee Job data from one job/assignment to another now allows for accepted absence requests in the selected date range to be migrated to the new job as well as any pending cancellations. This allows employees to request these absences be cancelled from their latest job/assignment.

**Flexitime functionality in Roster Patterns** *T&A*

Target hours can now be added manually or in a roster pattern to emulate a Flexitime set up where presence within a time period earns credit, for example a period of 08:00-20:00 with 7 hours of working target.

*Please contact your account manager if you are interested in this feature.*

**Link to View Contract from Calculation Analysis** *T&A*

When selecting the Calculation Analysis Mode  in the History screen there is now a View Contract button to link directly to the contract for the selected assignment to allow faster resolution of queries.



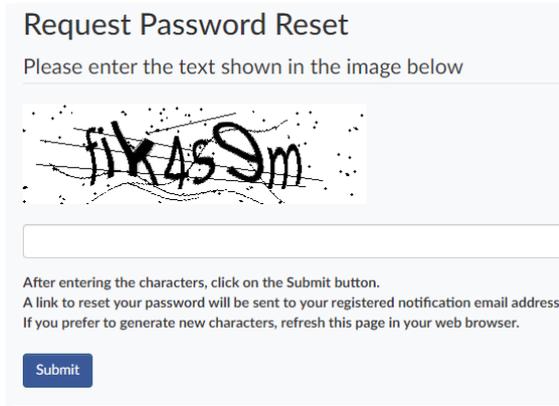
**Default Shift Attribute Changes and Update** *T&A*

When an employee’s job has a required default attribute edited e.g. Location on a presence period, the roster shifts from the date changed onwards will auto populate with the new default attribute. Attributes previously manually edited by a user will not be changed.

**Actual Detail Reports** when the report is run will now calculate shifts that have been entered without having to wait for history to be recalculated. This is dependent on the User Preference ‘Allow Reports to auto calculate’ being on. *T&A*

## Forgotten Password Security Improvement *T&A & Flex*

As a security improvement the Forgotten your password option on the Sign In screen no longer displays the email address of the person the reset will be sent to but shows 'A link to reset your password will be sent to your registered notification email address.'



**Inactive Hierarchy** items will not be displayed in drop downs to be set against assignments/jobs or on date tracking. Jobs where the hierarchy item was set when active will retain then. This is for Location, Cost Centre, Job Role, Grade and Access Control Group. *T&A*

## View Restrictions Permissions *T&A & Flex*

View Restrictions allows administrators of the HFX Workforce Management system to restrict employees to view only particular balances on the Self-Service Calendar and Home page (*T&A*), and certain adjustments in the Add Requests page (*T&A & Flex*). It is also used to restrict managers to view particular balances on the employees history screen on the Administration site (*T&A*). Previously, View Restrictions was only available on the Edit Employee screen. There is now a new client setting "Employee Viewing Restrictions -- where they are defined", which has 3 options, 1 = against a permission profile only, 2 = against the employee only, (as before) and 3 where it can be on a permission profile and employee but if set against an employee will take precedence over the permission setting.

## Resolved Issues

### Prevention of period types being changed on existing roster periods *T&A*

Presence periods which have been saved by clicking Save on the icon toolbar can no longer be changed to an Absence. They can be changed to an Overtime period.

When adding a period in the Create Roster Period box, using Save here will still allow the period type to be edited and changed before clicking Save on the icon toolbar. *Note - There is an existing quick override feature which if enabled allows the period type selector to be set to Absence and then double clicking on a Presence period will automatically generate an absence period with the same times.*

### **Create Open Shift Icon Disabled when there are Unsaved Changes** *T&A*

When creating Open Shifts using the Create Open Shift icon from the Staff Roster tool bar, if there are any existing unsaved changes for roster periods the following message will now be displayed,

‘You have pending changes. These changes must be saved before creating an open shift. Proceed?’

### **Deleted Assignments and ‘Ghost’ Periods** *T&A*

Assignments/jobs that had been deleted and had a roster pattern were displaying 'ghost' periods in the roster. The jobs should have been end dated rather than deleted. *Note – when an HR system is integrated with HFX Workforce Management it is important to ensure both systems are kept in synchronisation for data about people and jobs.*

### **Incorrect Times on Greater than 12-week Pattern in Block Mode** *T&A*

When viewing and editing Roster patterns lasting longer than 12 weeks in ‘Block View’ the shift times were not correctly displayed.

### **Removal of Adjustment from a Batch when the Reason is Changed** *T&A*

When an adjustment covers more than 1 date e.g. 10 days of annual leave it is added as a linked batch. From this version if part of the batch has the adjustment reason changed for example from Paid Leave to Unpaid Leave it is unlinked from the original batch. If the time of the adjustment is changed e.g. from a full day to am this is kept in the original linked batch.

### **Pop-Up Map Intermittently not Loading** *T&A & Flex*

The location tag generated from geo location clockings and shown in the Info column of the history screen intermittently did not load the pop-up map of the location when clicked on.

### **Sequential Assignment Balances and Night Shift** *T&A*

When a sequential assignment on a T&A contract-based person had a night shift on the first date of the second assignment, the Annual Leave balance was not carried over from the previous assignment.