Workforce Management Release Notes for Version 5.8.6

Scheduled for Tuesday 7th January 2025

The update will start at 18:30 and could take up to 90 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.

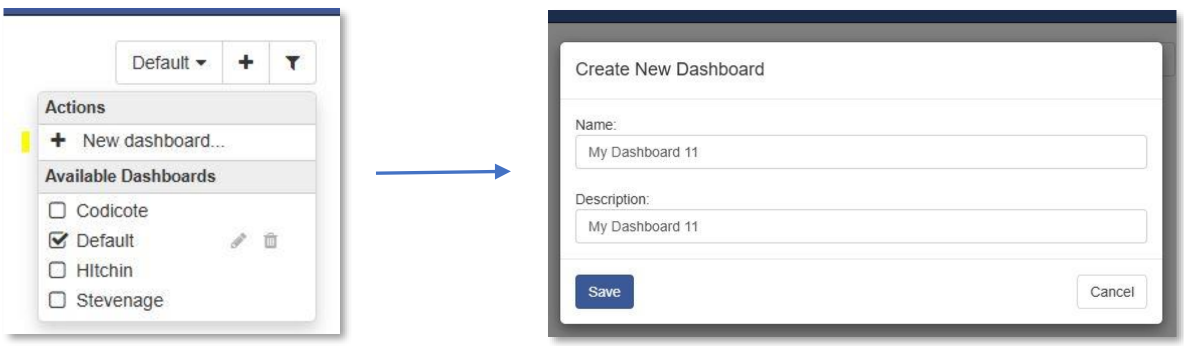
Administrators can opt out of receiving release notes by selecting 'Me' then 'Preferences'. on the Admin screen and unticking 'Receive Release Notes'.

New Features and Improvements

Customised Dashboards

Administrators and Managers can set up their own Dashboards on the Home Page. The Dashboards can be customised by selecting which people to include, which panels and the configuration of the panels for those with options.

Adding a Dashboard

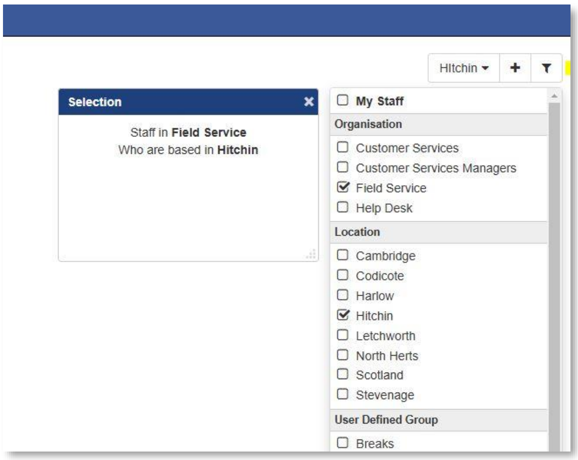


After the update each login has a default Dashboard with the Home Screen panels, they last used on the Home Screen.

To add a new dashboard, click on the drop-down selector box with 'Default' on. A new 'My Dashboard xx' will be generated, where the x is a number. A new title and description can replace this. The panels currently on display will be added to the new dashboard but can be deleted. When selected, each Dashboard can be re-named or modified by clicking on the pencil icon or deleted by clicking on the bin icon. The panels, the position and their configuration will be saved to the dashboard as the last time they were used/modified.

Customising a Dashboard

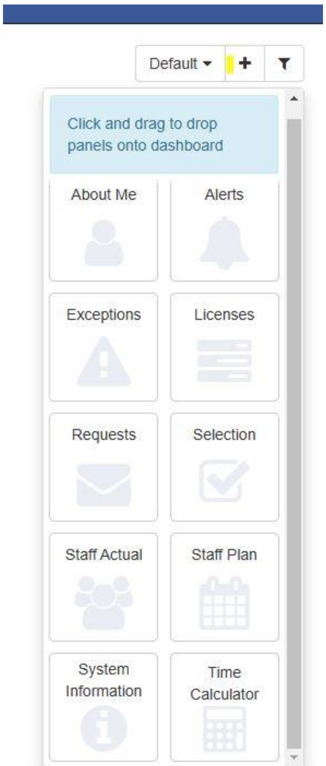
Managers may wish to save differing versions of the same panel to different dashboards, so for example, if a Manager has teams at three locations they could save one Dashboard as Location A, the second as Location B and the third as Location C.



When the Dashboard is selected, using the 'Choose People' filter icon the Selection Panel will allow the people selection for the Dashboard. In this example the Dashboard is named Hitchin, and the selection filter has filtered for People in the Organisation 'Field Service' who are the location 'Hitchin'. The Selection Panel will display the filter criteria. The dashboard can have a name to imply the selection criteria. If not, it could be a good idea to keep the Selection panel in each Dashboard version.

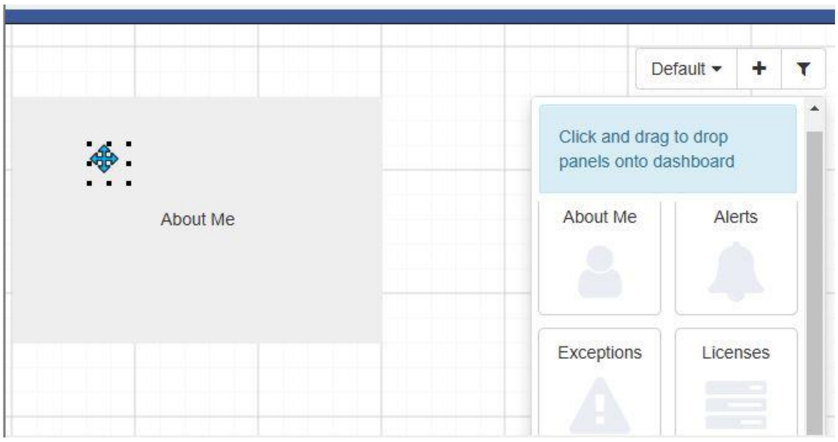
The other panels that are on/ added to the Dashboard e.g. 'Staff Actual' and 'Requests' will display data for the selected people in the Dashboard.

Selecting Panels



Select Panels by clicking on the + 'Add Panels' icon.

The panels available to the user will be displayed and can be dragged into position. As a panel is dragged a grid is displayed to show where the panel will 'snap to' when it is released. The panels have a default size but can be enlarged by clicking over the dots displayed in the bottom right-hand corner until the cursor changes to a double headed arrow.



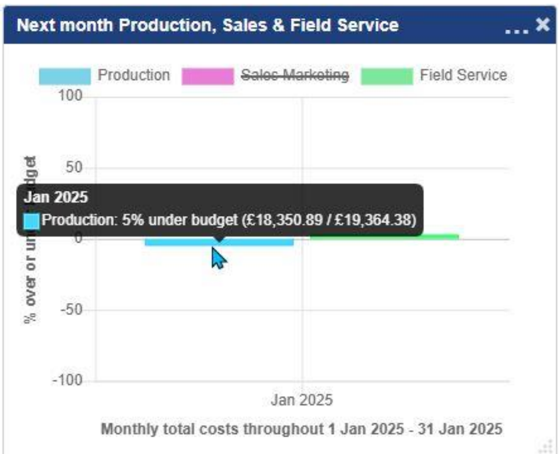
New Panels

There are three new panels, Costing vs Budgets Chart *T&A* (needs the Budgeting license), Requirements Chart *T&A* and Calculator.

Costing vs Budgets Charts *T&A*

The Costs vs Budgets Chart gives a visual indication of the difference between Staff Costs and the Budget set for the Cost Centre they are attached to. Access to the Chart is controlled by having the Budget licence and the permission 'Roster Budgets Chart'.

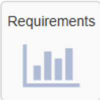
Bars above the horizontal axis indicate costs are exceeding the budget and below the line are under budget. The Chart can be configured to display cost centres, days, weeks, months and years with a maximum of 1 year. Future or past dates can be displayed. The Chart defaults to starting on the 1st of the current month. The Chart can be set for example to display next month's figures and be grouped by days to display the pro-rated figure for each date.



A cost centre can be temporarily removed from the Chart by clicking on the cost centre name at the top of the Chart, this is indicated by being crossed out.

Hovering over a bar on the Chart will display the percentage under or over budget and the actual figures for the staff cost against the prorated budget figure for the period.

Requirements Chart *T&A*

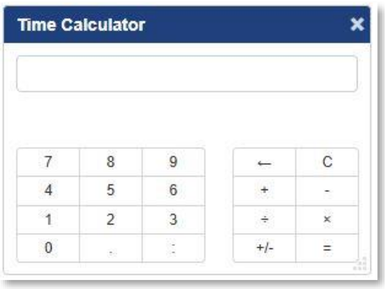


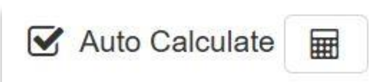
The Requirements Charts give a visual indication of where there are deficits or surplus against requirements for number of employees. Above the horizontal axis is surplus and below deficit. The date ranges can be set to display days, weeks, months and years with a maximum of 1 year. Future or past dates can be displayed. The Chart defaults to starting on the 1st of the current month.

In the chart configuration a definition can also be set to display a filter of the requirements for example of a particular activity. The default definition is set to display All Requirements. The definitions for Requirements Chart configuration are set in 'Requirements Charts' under the Planning tab.

On the chart clicking on the month name on the horizontal access label drills down to displaying weeks, which are shown with the date for the first day of the week. Clicking on that number will drill down again to view the week by days. Clicking on the up arrow icon next to the date range label changes the display to the previous level. Hovering over a bar will display the number of surplus/deficit staff.

Time Calculator





The new Time Calculator is available from the Home Screen panels or on the History screen when clicking on the icon next to the Auto Calculate text.

This behaves like a normal pocket calculator, i.e. you type in the first amount, then press +, then the second amount ,then press equals. For + and - times can be used in decimal or HH:MM format. For * and divide, the first amount must be a time (decimal or HH:MM) and the second amount is a plain number.

So can add and subtract times but multiplying and dividing a time is by a number (i.e. to increase it or split it into portions). Each button has a tooltip with an explanation and example. When numbers are input as decimals they are displayed in the time format.

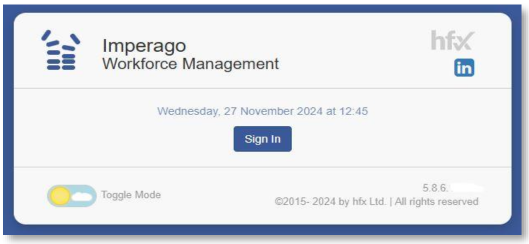
Other Changes to Panels

- On the Licenses Panel the actual number of licenses is now displayed as well as the percentage of used against available. The colour associated with the license is green for less than 70% used, orange for 70% or more and red is now shown for 5 or fewer licenses remaining.
- The Staff Plan and Staff Actual panels instead of displaying ‘Rest’ in the key for the diagram show ‘Not on Shift’.
- The selection filter for the Staff Actuals panels is now remembered from the previous login.

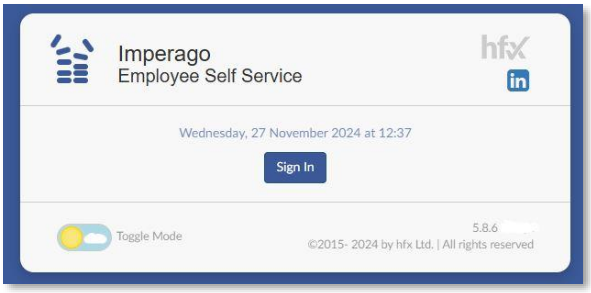
Improvements to Imperago Home and Login Screens

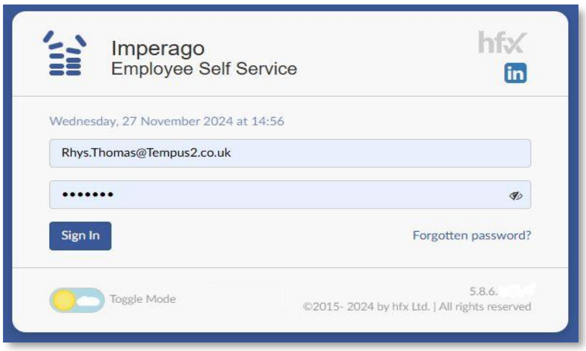
The styling of the Home and Login screens have been updated. Light and dark mode can now be toggled from the screens before logging in. The Imperago name and logo have also been added.

Admin site



Self-service





Sending Messages to Staff Using Imperago

Client Admins and Managers can now use Imperago to send messages to staff on the system.
The messages can be sent by email, Employee Self-Service or via SMS to mobiles.
The messages are sent using the Choose Bulk Edit facility on the All Employees screen.

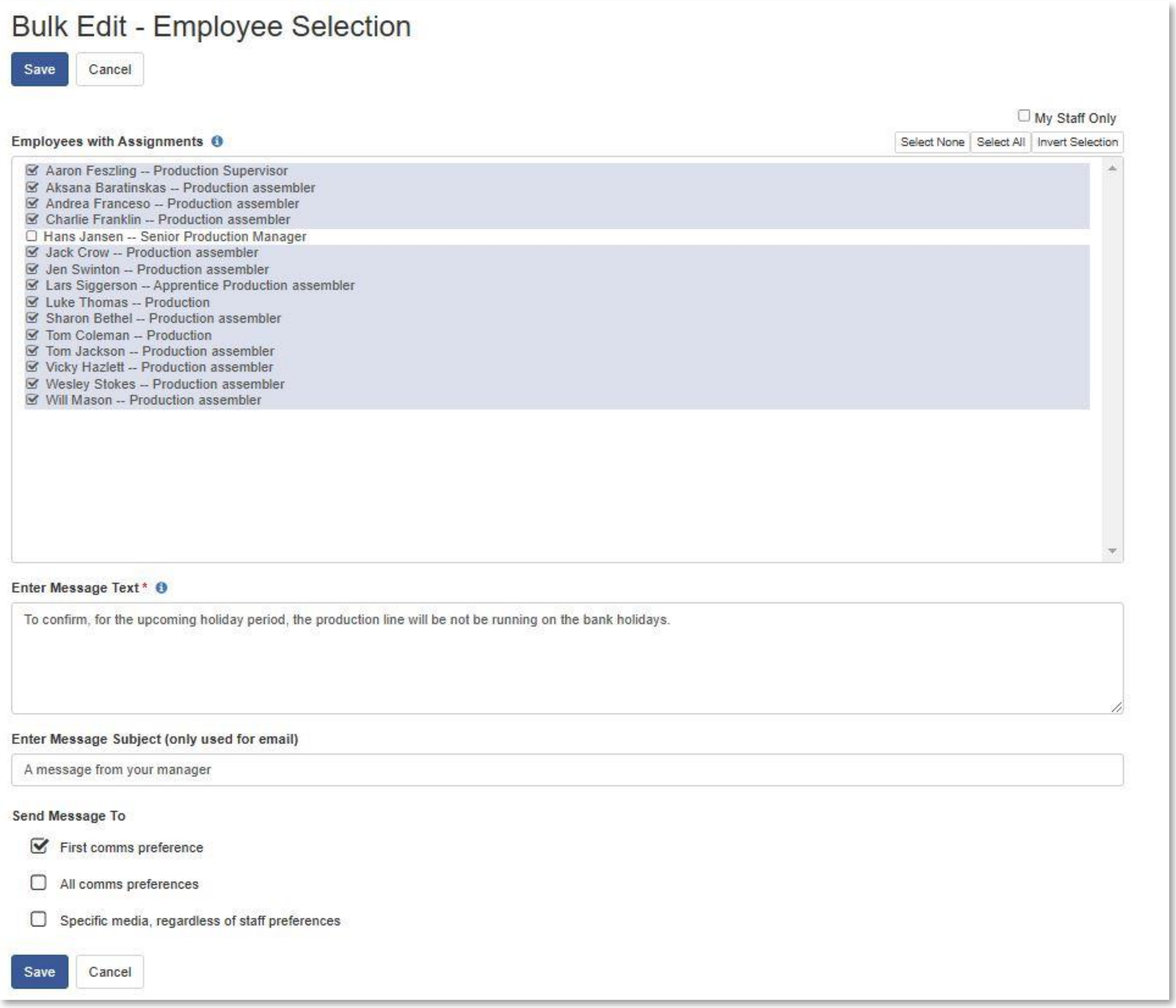
<u>Send Messages Configuration</u>

The licence ‘General Communications’ is required for messaging and ‘SMS’ for messaging to mobiles.
A new permission ‘Send General Communications Message’ controls access to the feature.
The staff should have in the Employee Notifications settings an email address and or a mobile number.
Messages to Self-Service will go to employees with permission to access Self-Service.

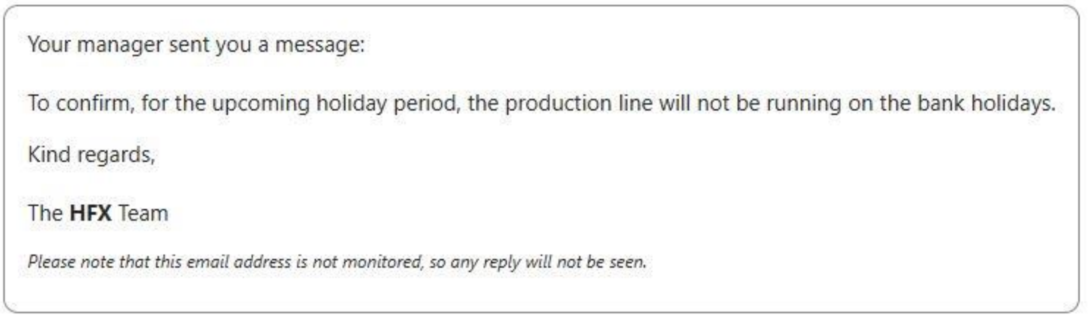
Another new permission ‘Communications preference is read-only and cannot be changed by staff in Self Service’, off by default, allows if required, company policy to override preferences the staff may have set for themselves ensuring they can be messaged.
To change existing Communications Preferences there is also a new Bulk Edit selection, ‘Change Notification (Communications) Preference’.
The All Employees grid has two new columns, ‘Notification Mobile’ and ‘Notification Preference’.

Messaging Work flow

To send a message to staff, on the All Employees menu, filter for who to send the message to, e.g. by ‘Job Role’ and ‘Location’.
Then from the ‘Choose Bulk Edit’ selection pick ‘Send General Message to Staff’.
The Bulk Edit – Employee Selection Screen will be displayed, on which staff can be de-selected if needed.
In the ‘Enter Message Text’ box add the message to be sent. Keep messages brief, especially if using a media type other than email.
The ‘Enter Message Subject’ box is only used for email and defaults to ‘A message from your manager’
Under ‘Send Message To’, the default is to send to ‘First comms preference’, this helps reduce staff possibly receiving multiple messages. The other options are ‘All comms preferences’ or ‘Specific media, regardless of staff preferences. When selecting the Specific media option selection boxes are shown for Email, Employee Self Service and SMS Text Message.



Once the message is saved there will be confirmation of how many people were notified and by what method. Example below of the message sent by email


Your manager sent you a message:

To confirm, for the upcoming holiday period, the production line will not be running on the bank holidays.

Kind regards,

The **HFX** Team

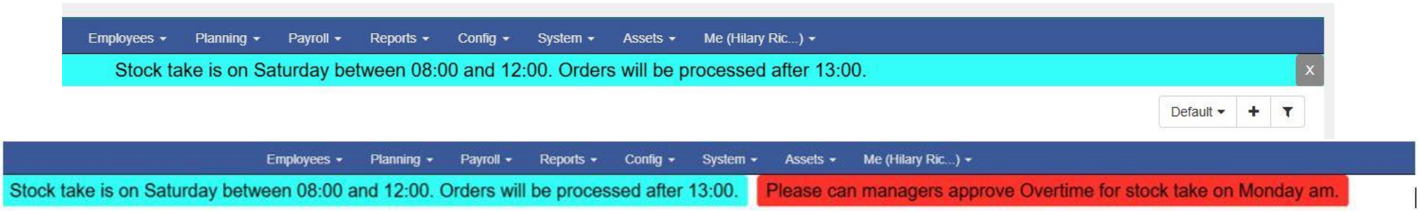
Please note that this email address is not monitored, so any reply will not be seen.

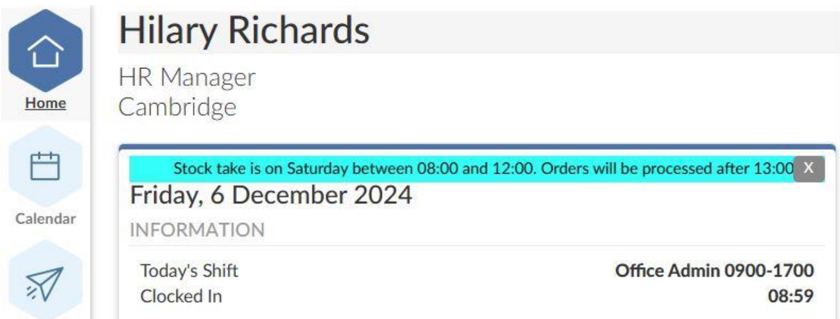
Home Page Banners

Home Page banners can be added on the Admin and or Self Service sites to give information to **all staff** on the system. This requires the Home Page Banner license and that the Client Admin has the permission ‘Manage Home Page Banners for own Client’.

The Home Page Banners screen is on the System tab of the menu. On the Your Client Home Page Banners screen are listed the current and expired banners unless the Show Expired Banners box is unticked. Banners can be copied and used again with new dates with the same or different settings.

Multiple banners can be configured with different start and end dates. The banners can also be configured to display in a certain order. Banners can have different colours and can be sent to both Admin and Self Service or either of them. The banner(s) are no longer displayed from the expiry date or if the user selects the ‘X’ at the end of the banners to dismiss them.





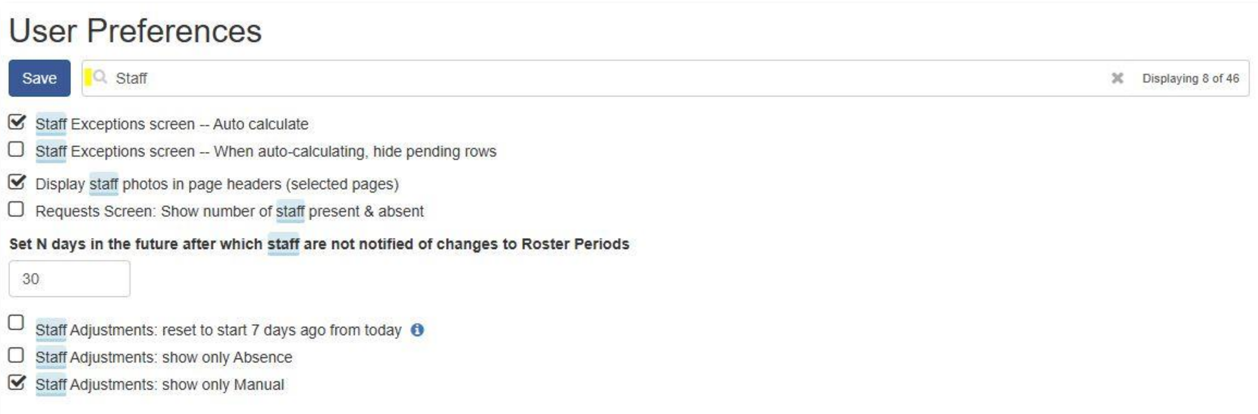
Searches - New searching functionality has been added for User preferences, Permission Profile settings, Client settings and Contract Rules.

For User Preferences, Permission Profile settings and Client Settings when the search function is used only the results are displayed and changes to them can be saved at the same time as the Save button is alongside the search bar. Any search data can be cleared from the search field by clicking on the X.

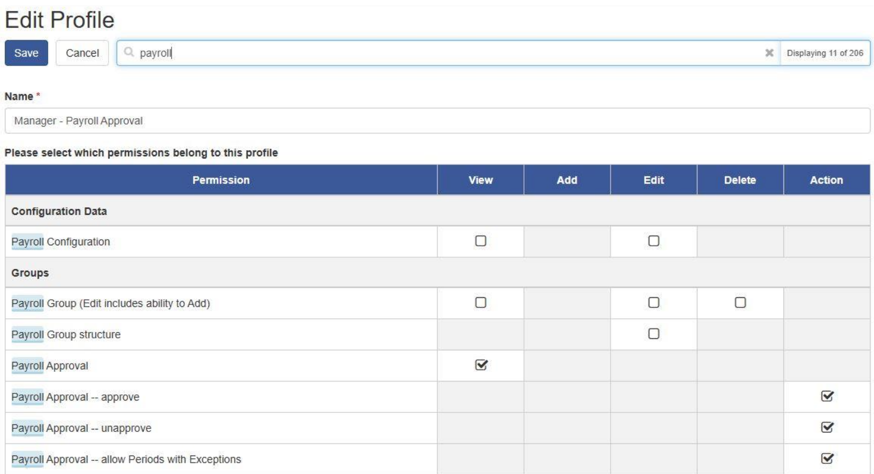
Client Settings Search

All the Client Settings can now be searched for, including the settings within panels which expand to show the result.

The User Preferences search



Permissions Search - A new Permissions Profile Search bar is shown at the top of a Permission Profile. The search bar will search settings in and outside the permissions table. The search bar and the table headings are still shown when scrolling down the page.


Edit Profile

Save Cancel payroll Displaying 11 of 206

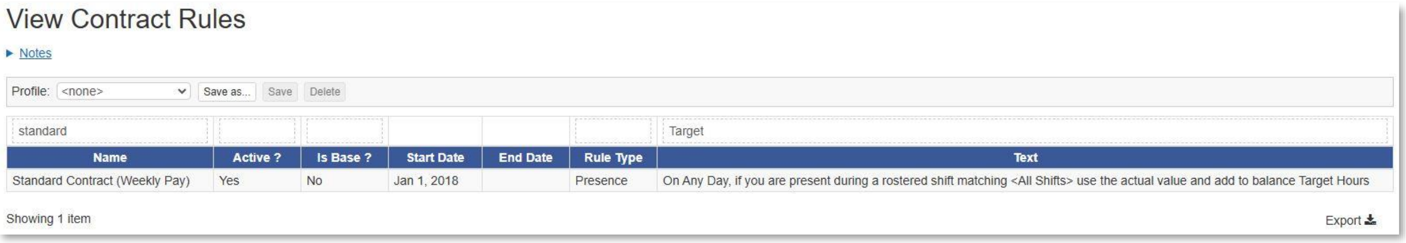
Name *

Manager - Payroll Approval

Please select which permissions belong to this profile

Permission	View	Add	Edit	Delete	Action
Configuration Data					
Payroll Configuration	☐		☐		
Groups					
Payroll Group (Edit includes ability to Add)	☐		☐	☐	
Payroll Group structure			☐		
Payroll Approval	☑				
Payroll Approval -- approve					☑
Payroll Approval -- unapprove					☑
Payroll Approval -- allow Periods with Exceptions					☑

Contract Rules Search *T&A* - Client Admins can now view, filter and search the contract rules for all contracts. The data itself cannot be changed. Going forward the table is updated as contracts are added or edited. The 'View Contract Rules' page is on the Config tab.

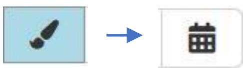


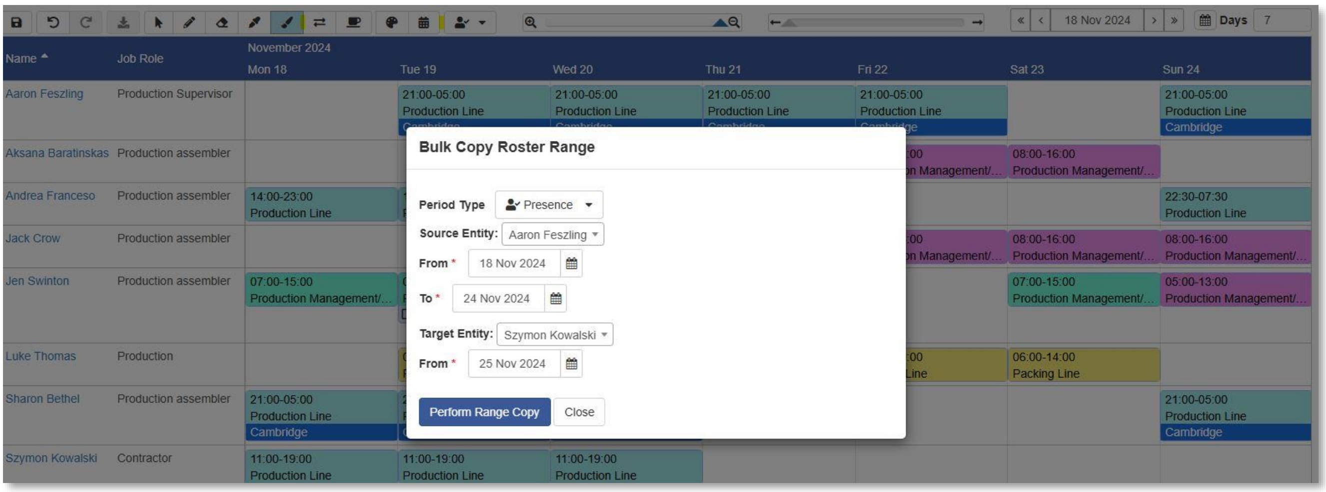
Name	Active ?	Is Base ?	Start Date	End Date	Rule Type	Text
Standard Contract (Weekly Pay)	Yes	No	Jan 1, 2018		Presence	On Any Day, if you are present during a rostered shift matching <All Shifts> use the actual value and add to balance Target Hours

Improvements to the Roster Planning Screen *T&A*

Roster Copy Mode is a new feature allowing managers to copy, for example a set of shifts from last week and paste them to this week, either for the same person or for a different person.
Selecting the 'Paint Mode' icon then displays the new 'Paste Range' icon. Either Presence, Absence, Overtime or Availability periods can be copied but only 1 period type at a time.
Select the name of the person and the date range to be copied from. The roster periods will only be copied if they have already been saved. Then select the name of the person to be copied to and the start date. The start date being copied to does not have to be visible on the screen. Then select 'Perform Range Copy' to paste the copied periods.
Copy and pasting periods will not overwrite/delete any on the target person in the pasted to date range.

The 'Undo' icon will delete any unsaved changes.

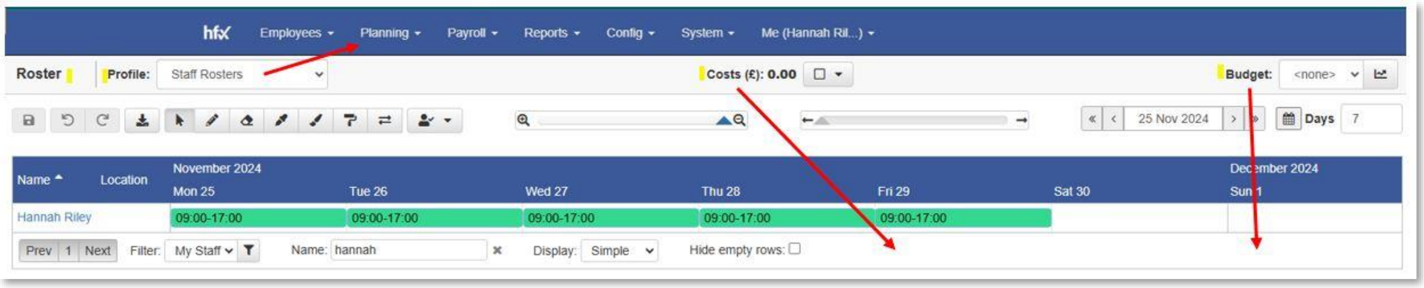




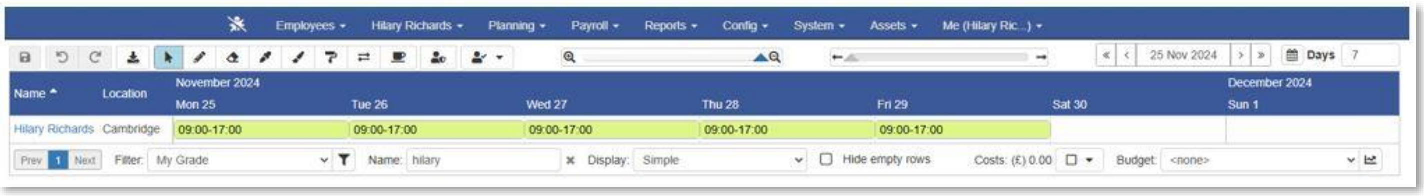
Visual improvements to the Planning screen

- The roster profiles have been moved onto the Planning menu.
- The Budget and Cost bars have been moved to the bottom of the roster screen, (if have the Budgeting license).

The current Staff Roster display with where the changes are

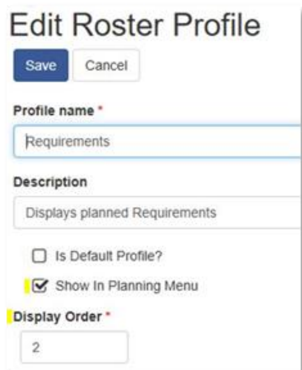


The new Staff Roster layout

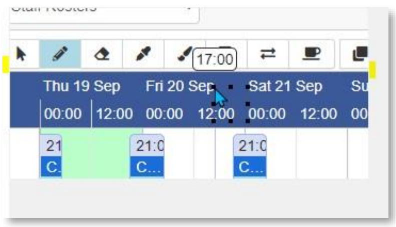


The Roster Profiles are now displayed in the Planning Menu dropdown.

Under Roster Profile, (also in Planning), there are new options whether to display profiles in the Planning Menu and in which order.

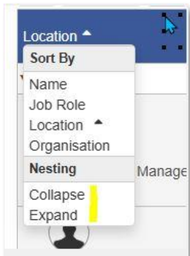


- The "time indicator" now floats over the menu icons.



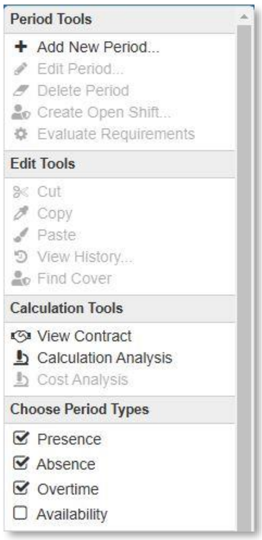
- The selected icon on the Roster screens toolbar is more obvious. When hovering over the colour changes to a darker grey and then blue once the icon is selected.

- Roster Screen Display Modes that use the option to group/nest by attributes, for example by Location can now select to Collapse or Expand all the locations on the roster page by clicking in the top left-hand corner of the grid.



- **Roster Menu Improvements**

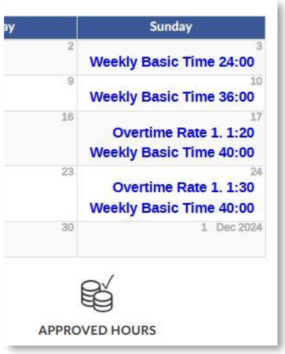
  The control to select what is displayed on the roster screen has been updated. There are new section headers, and an item can be selected by clicking on the label as well as using the check box. For example, to remove Absences from showing on the roster screen either click the tick box or click on 'Absence'.



- Changing the Roster Profile or navigating back to the roster screen will no longer automatically load the Standard Display on the screen. When a Display Mode, e.g. Simple is selected this is retained until a different mode is selected by the user.

Self Service Changes

New Self-service Calendar Tab to show Approved Payroll balances to help reduce payroll queries. A new user permission 'View own payroll balances in Self Service', once set on shows a new tab called Approved Hours. Approved balances are displayed on the last date of the payroll period. If the payroll approval is removed the balances are not shown but re-shown on re-approval and are still shown after a payroll extraction is run. *T&A*



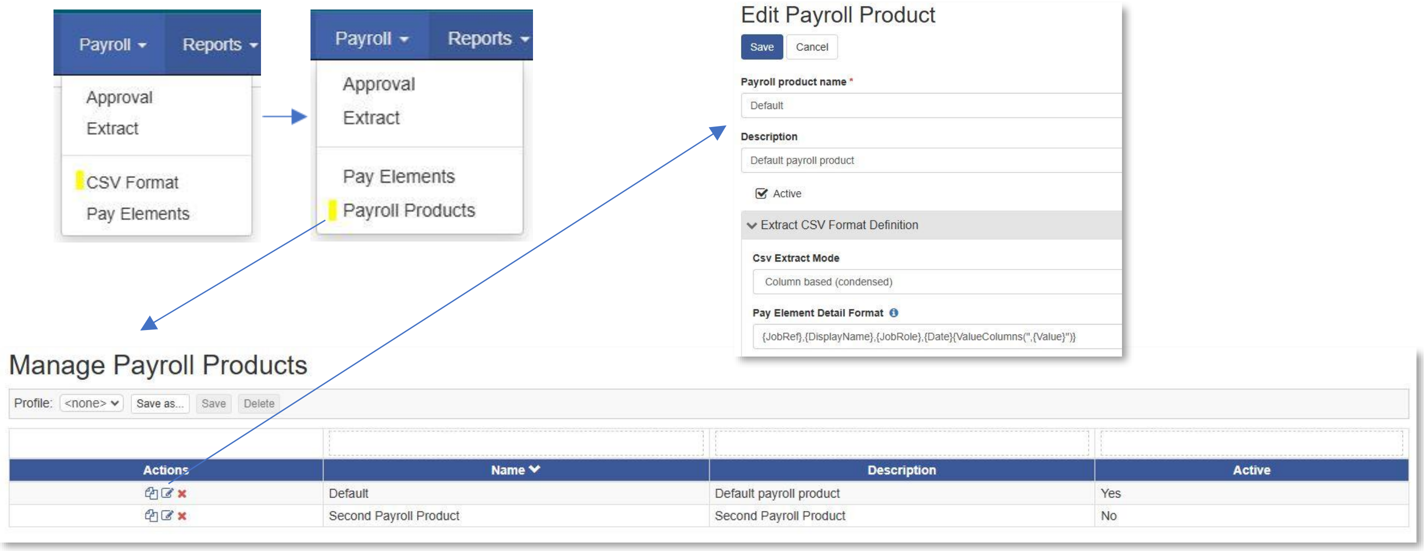
- Exceptions are now displayed in the calendar pop up box for the date. *T&A*
- For night shift workers the information has been improved on the Self-service screen. Previously if a shift started on one date and finished on the following when looking at Self-service during the shift on the 2nd date Today's Shift was not displaying the current shift and the Duration was showing as 0:00 hrs. Now the current shift is displayed with a line. Yesterday's shift is displayed if it is still active and will be underlined. When there is another shift starting on the 2nd date, today, this will be shown as Today's shift and not underlined. The Duration will show the correct balance for the night shift until the end of the shift. See the example below.

- In Self-service if a page takes longer than a second to load a 'Please Wait' icon and message will be displayed, for example whilst history is being calculated.
- Now on a full days absence the shift will also be displayed. The client setting "Show Shift when Full Day Absence exists on Day" and is on as the default.

- For T&A systems shifts will be displayed alongside the text Public Holiday on dates from the Public Holiday Calendar. The new client setting, “On Calendar Show Shift with Public Holiday” is on as the default.

Payroll *T&A*

- Employees will be able to see their approved balances on a new Calendar page in Self Service – please see the Self-Service section for more details.
- Imperago Workforce Management can now support multiple payrolls products with differing formats. Where the existing Payroll Configuration CSV format is displayed has changed to accommodate this. The Payroll menu now has an additional level “Payroll Products” instead of CSV Format. Selecting “Payroll Products” opens the Manage Payroll Products screen for additional products/formats to be configured. The existing payroll CSV format configuration is in the Payroll product listed as Default.



- In the Alerts Panel on the Home screen the number of Payroll Alerts displayed will now be restricted to the last 2 for monthly payroll periods alerts and last 8 for weekly payroll periods.

Open Shifts *T&A*

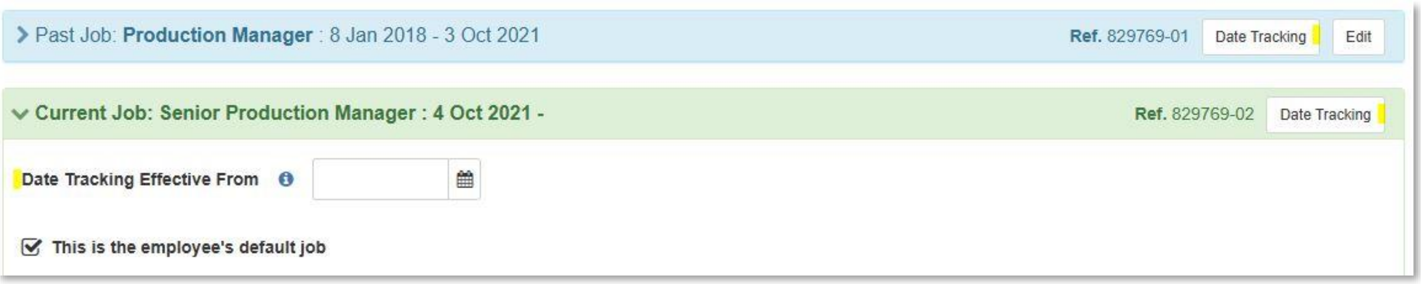
- **The Open Shift Accept/Decline pages** - When opened from the email invitation the page now show details of the shift including times, name of person covering for, if relevant and attributes as shown in this example.

- Managers with Operational Permissions to view non reporting staff, for example by a location, can now receive notifications for Open Shifts when the location matches on Auto Allocation and when re-opened by a Self-Approved request. To enable, select the Operational Permission “Receive open shift notifications (auto-allocation and re-open)”.

General Changes

Date tracked changes can now be made from within the Edit employee screen.

Each assignment against an employee has a Date Tracking button to link to the Date Tracking screen for that assignment so changes can still be made from that screen as well.



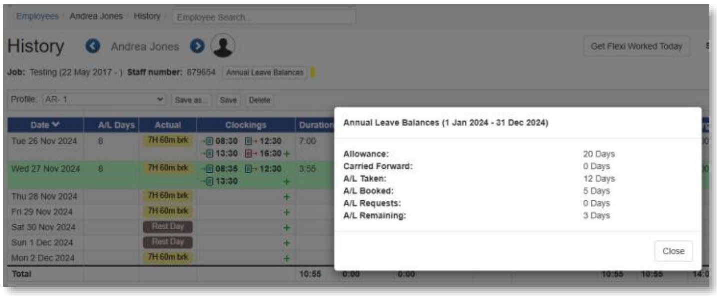
When on the Date Tracking screen there is a 'Remove Filter' button to be able to select other employees if required.

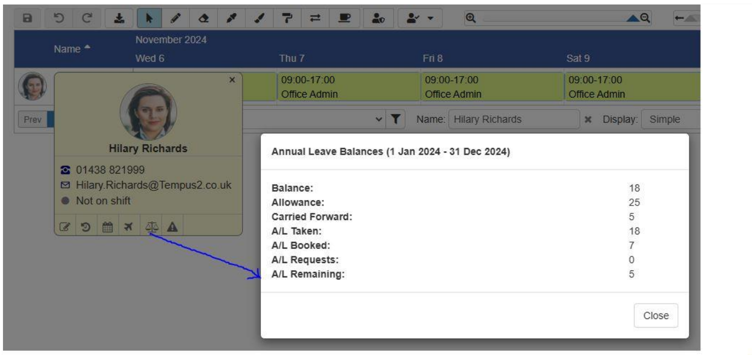
On Edit a job the Fields that are date tracked in a job are marked with (date tracked).

At the top of the Current Job there is a new field 'Date Tracking Effective From'. So, for example to add a date tracked change if an employee's job location is changing make sure to add the date to the new field when it is changing from and then change the location.

Note - for Job data shared between Imperago and another system e.g. an HR system some date tracked fields maybe restricted and will be greyed out so they cannot be changed to ensure the systems stay synchronised.

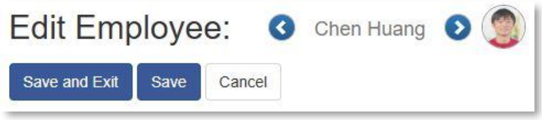
- **The Annual Leave Balances** panel has been added to more areas of the system including the History screen, the Calendar page and in T&A on the Staff Roster Photocard by clicking on the balances icon.





- On Roster Patterns, under Additional Fields there is an 'Active' selection box. When patterns are added this is on as default. Untick this setting when a pattern should no longer be available for selection when assigning patterns. The Roster Patterns list screen has an Active column to display if patterns are active or not. *T&A*
- Availability types can now be set to be inactive by unticking the Active checkbox. *T&A*

- For administrators wanting to edit more than one employee, the “Save” button will now save the details just edited but remain on the Edit Employee page for another employee to be selected from the Employee Search field. A new button “Save and Exit” will return to the All Employees screen.

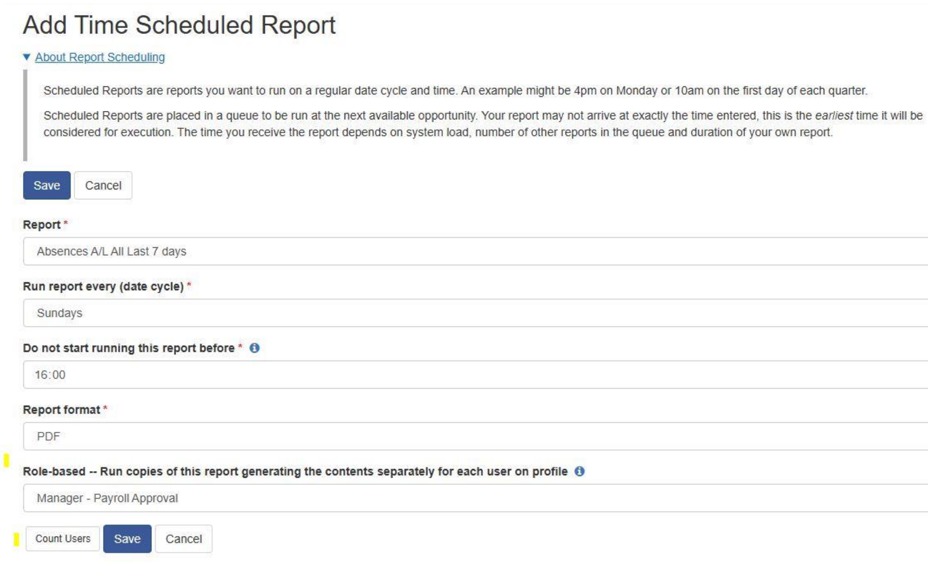


- **Delegation Icon** – A new icon is displayed when a person is logged and has selected in the About Me panel a person they are delegating for. The icon is displayed at the start of the menu bar and next to the title for screens.

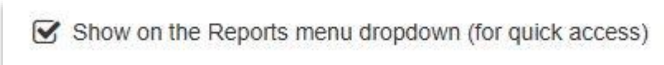
- **Requirements Sort Order** - When clicking on the Requirements row at the bottom of the staff roster, a pop-up box shows the requirements for that date and their status. Multiple requirements are now ordered by the highest least matched (red) first, followed by the matched ones (green) below. Within the matched and unmatched the requirements are also listed in alphabetical order. The order of how the attributes are displayed within the line of a requirement is matched to the priority order configured on the Requirements period. *T&A*

Reports

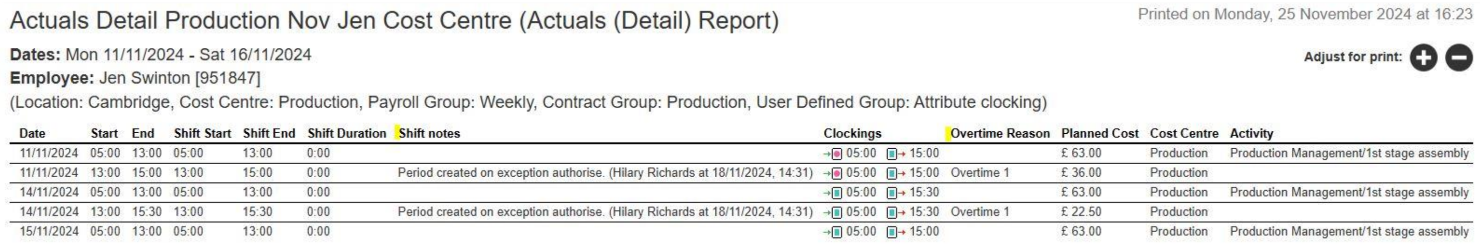
- **Scheduled reports for multiple staff matching a permission** - Time Scheduled reports can be now set up to be automatically run for all users matching a permission profile. So, for example 1 report can be generated for each Manager (with the same permission profile) with data relevant for their own reporting staff. The report is not run for the person who sets up the report. The new setting for this is, “Role-based -- Run copies of this report generating the contents separately for each user on profile” with a drop down to select the permission profile. The report cannot be saved until the Count Users” button which shows the number of people assigned to the selected permission profile to help prevent mistakes.



There is a new setting for reports, ‘Show on the Reports menu dropdown (for quick access)’. This defaults to on when adding a report so that the report is displayed on the Reports drop down list as previously. Now new or existing reports can be edited so that they no longer are shown.



- The Actuals Report will now display the Overtime Reason for an overtime period. *T&A*
- The History & Actuals Details reports can now include notes added to a roster period. When setting up a report under Additional Parameters tick the option ‘Show Shift Notes’. The notes can be ones added by a manager to the roster period or ones generated by the system for example when an exception is authorised for overtime.



Actuals Detail Production Nov Jen Cost Centre (Actuals (Detail) Report)

Printed on Monday, 25 November 2024 at 16:23

Dates: Mon 11/11/2024 - Sat 16/11/2024

Employee: Jen Swinton [951847]

Adjust for print:

(Location: Cambridge, Cost Centre: Production, Payroll Group: Weekly, Contract Group: Production, User Defined Group: Attribute clocking)

Date	Start	End	Shift Start	Shift End	Shift Duration	Shift notes	Clockings	Overtime Reason	Planned Cost	Cost Centre	Activity
11/11/2024	05:00	13:00	05:00	13:00	0:00		05:00 15:00		£ 63.00	Production	Production Management/1st stage assembly
11/11/2024	13:00	15:00	13:00	15:00	0:00	Period created on exception authorise. (Hilary Richards at 18/11/2024, 14:31)	05:00 15:00	Overtime 1	£ 36.00	Production	
14/11/2024	05:00	13:00	05:00	13:00	0:00		05:00 15:30		£ 63.00	Production	Production Management/1st stage assembly
14/11/2024	13:00	15:30	13:00	15:30	0:00	Period created on exception authorise. (Hilary Richards at 18/11/2024, 14:31)	05:00 15:30	Overtime 1	£ 22.50	Production	
15/11/2024	05:00	13:00	05:00	13:00	0:00		05:00 15:00		£ 63.00	Production	Production Management/1st stage assembly

- The History Report now has a column to display the Managers of employees in the report to help administrators know who to direct any queries to.

Exceptions

For T&A customers there is a new client setting, “Exception Alerts – Suppress exception types on people not fully calculated”. The default is off. The different types of exception can be selected e.g. Missed clocking. Enabling this can be used for example when people clock out from a night shift after the Exception Alert email is generated.

The Staff Exceptions screen has three additional columns displayed for each exception “Actioned By” , “Actioned When” and “Manager”. The new columns are on by default. The first two will display who by and when an exception was Acknowledged or Unacknowledged. The Manager column displays the Manager(s) for the employee.

Resolved Issues

- When delegating the About Me panel on the Home Screen will now show the name of the logged in person/representative at the top and who they are delegating for below.
- When delegating for a person the person delegating will no longer have access to the User Preferences for the person they are delegating for.
- On the Staff Roster screen when the Display Mode was set to display 'Fractional Date Periods' the AM and PM periods were the wrong way around. Now the AM period is displayed at the top of the cell and PM at the bottom.
- On the Planning Requirements screen rather than only showing the names of people matched to the requirement currently hovering over other matched requirements also showed the names of matched people.

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