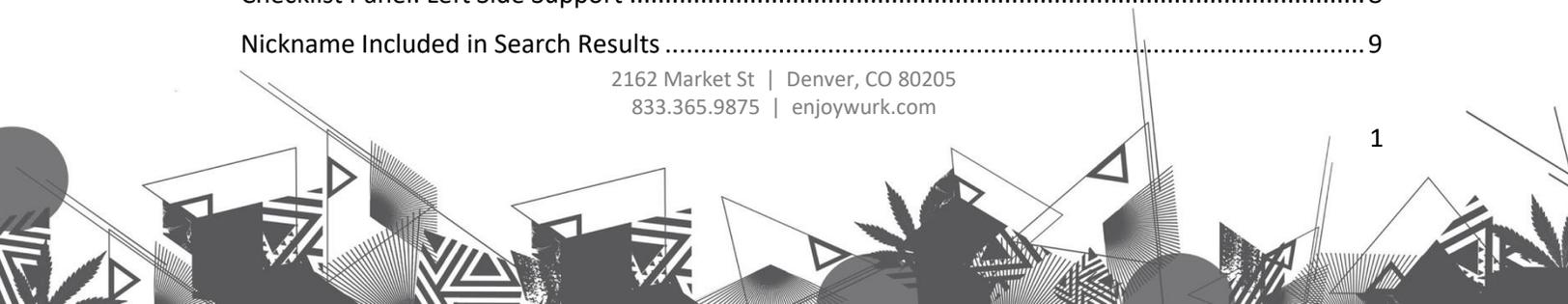


Release 77, October 2021

Wurk is a continually improving and evolving application. As part of our commitment to full transparency, we provide release notes that summarize the latest enhancements to Wurk functionality and usability.

Table of Contents

Payroll	3
Gender Options such as Non-Binary Now Appear in Tax Export	3
ARPA Earning Safeguards Added	3
TLM	3
Workflows	3
Manager Replacement To Do Items	3
Accruals 1.0: Added Accrual Policy Config Option to Ignore Work on Holiday	5
Sorting Columns on Bulk Timesheet	5
Time Off Request: Multiple Days TOR Did Not Skip Holidays	5
Bug Fixes	6
Dashboards: Could not add Detailed Calculated Time report	6
Scheduler	6
Workflows	6
New Availability Change Request Workflow	6
HR.....	6
Surveys	6
Checklist Completed Notification Updated	6
Recruitment - Applications	7
Applicant Communications: Details Now Available	7
Job Applications: Recruiter Added PDF Downloads.....	7
Recruitment: Offer Letter	7
Organization Charts	7
Updates to Export	8
Cross Product	8
Checklist Panel: Left Side Support	8
Nickname Included in Search Results	9



- Dashboard Tab Library 9
 - Pre-Configured Links Widget for the Administrator Template Tab 9
 - Start Widget Pre-Configuration for Administrator Template Tab 9
 - Links Widget Pre-Configuration for Employee Template Tab 10
 - Start Widget Pre-Configuration for Employee Template Tab 10



Payroll

Gender Options such as Non-Binary Now Appear in Tax Export

When an employee's Gender field (in their Employee Information record) is set to an option other than Male or Female, the system is now able to display those Gender options in Ceridian Tax files, ADP Tax files, MasterTax RTS files, and MasterTax Monthly UI files. The selected Gender from the Employee Information record now appears in the correct gender location in the tax files as follows:

Option Selected for Gender in Employee Information	Gender that appears in tax file
Non-Binary	X
NULL	X
Undefined	X
Male	M
Female	F

ARPA Earning Safeguards Added

Please ensure that this is the code you were using from April 1, 2021 to September 30, 2021

To help users correctly transition from FFCRA earning codes to ARPA earning codes, the system now includes safeguards as users create and finalize pay statements. The safeguards are as follows for pay statements with a pay date that is on or after April 1, 2021:

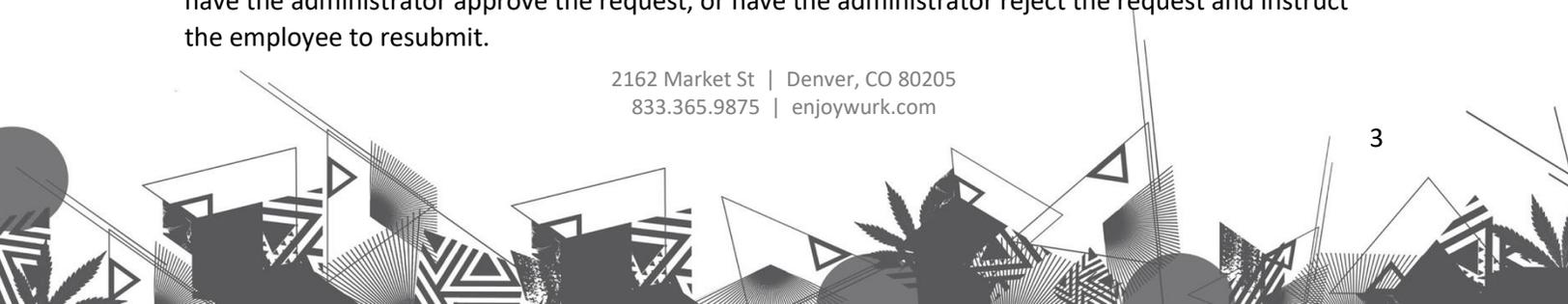
While users create and finalize pay statements, the system does not allow them to add an FFCRA earning to a pay statement that is not a Reconciliation, Payroll Adjustment, Historical, or Correction. If users add an FFCRA earning, the system warns that the old FFCRA earning codes cannot be used on or after April 1, 2021 and explains that ARPA FFCRA earnings should be used instead.

TLM

Workflows

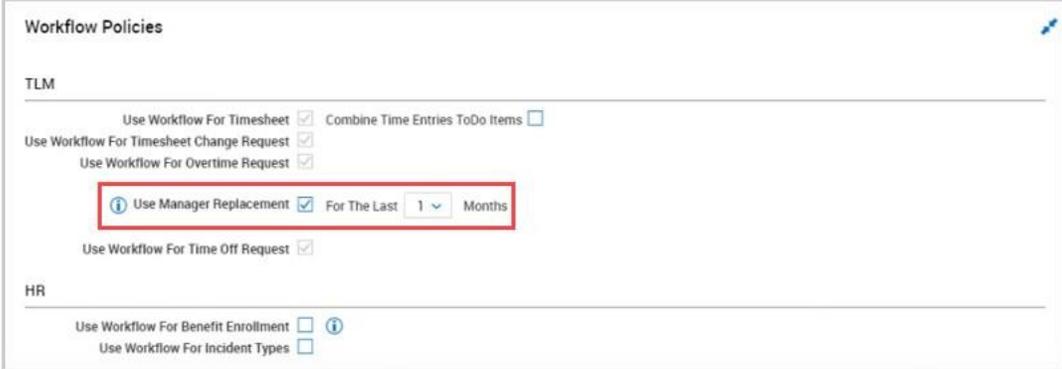
Manager Replacement To Do Items

Previously, when a time off request was submitted, a To Do would be created for the approving manager, but if a new manager was assigned before the request was approved, the To Do remained with the old manager and the new manager could not approve the request. The only ways around this was to either add a workflow delegation to the old manager to send the request to the new manager, have the administrator approve the request, or have the administrator reject the request and instruct the employee to resubmit.



What's been added: A new checkbox, Use Manager Replacement with the field, For The Last _ Months, has been added to the Workflow Policies widget under Global Setup > Company Setup > Global Policies tab. If enabled, To Do items for timesheets, timesheet change requests, time off requests, and overtime requests will be moved from the replaced manager to the new manager as soon as the corresponding replacement job is complete. The number of months that the system will look back for To Do items is controlled in the For The Last _ Months field.

Note: This checkbox is only available if TLM is enabled



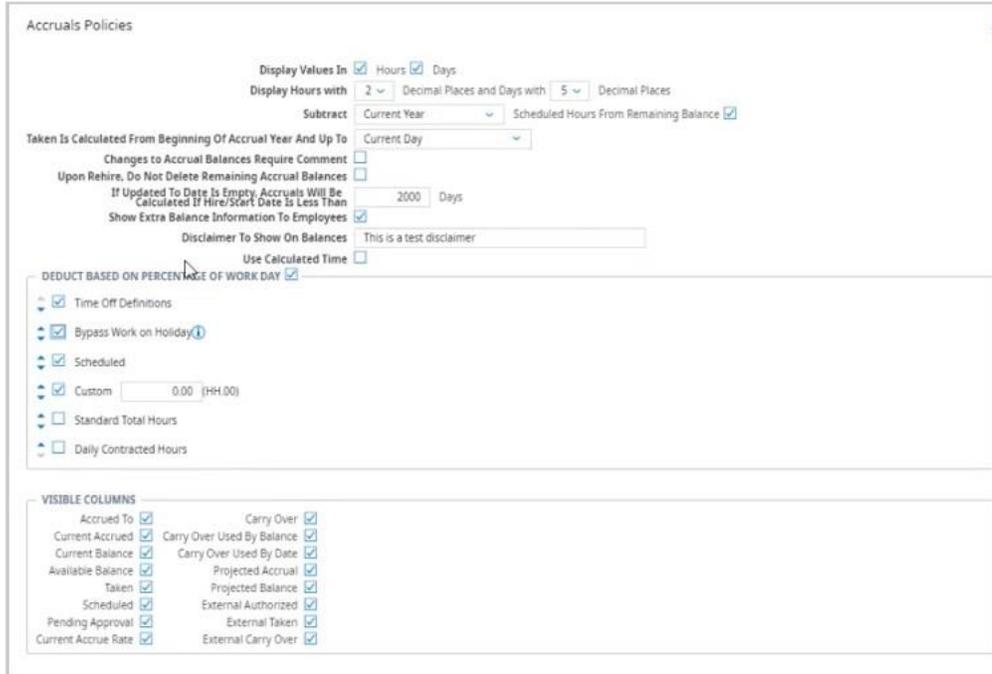
The screenshot shows the 'Workflow Policies' configuration page. It is divided into two sections: 'TLM' and 'HR'. Under the 'TLM' section, there are several checkboxes: 'Use Workflow For Timesheet' (checked), 'Combine Time Entries ToDo Items' (unchecked), 'Use Workflow For Timesheet Change Request' (checked), 'Use Workflow For Overtime Request' (checked), 'Use Manager Replacement' (checked and highlighted with a red box), and 'Use Workflow For Time Off Request' (checked). The 'Use Manager Replacement' checkbox is accompanied by a dropdown menu set to '1' and the text 'Months'. Under the 'HR' section, there are two checkboxes: 'Use Workflow For Benefit Enrollment' (unchecked) and 'Use Workflow For Incident Types' (unchecked).

When an employee's manager is changed in the Managers widget in the Employee Profile, the job will begin and an inline message will display at the top of the Employee Profile, A new manager cannot be assigned until the current replacement process is complete. The manager fields will also be grayed out. Once the job is finished running, the manager fields will no longer be grayed out and you can make changes to the manager again if needed.

If you select the View Workflow link from the To Do item or the applicable report, the workflow will show who the workflow has been redirected to, not the historical path with the previous manager.

Accruals 1.0: Added Accrual Policy Config Option to Ignore Work on Holiday

Previously, the values were deducted incorrectly when Accruals was executed on a day an employee was off on a holiday scheduled day off



What's been added: Under Global Setup > Company Setup in the Accruals Policies widget, a new setting has been added within the Deduct Based On Percentage Of Work Day section, Bypass Work On Holiday.

When enabled, the Accrual Policies will ignore the setting Is Day Off (in the Holiday Table) so that the full day amount will be deducted. This setting is also tied to when employees are scheduled, so it will move with the Scheduled setting. If scheduled is enabled with Bypass Work On Holiday, the system will look at Bypass Work On Holiday first.

Sorting Columns on Bulk Timesheet

Users can now manually sort columns on the a Bulk timesheet by selecting the sort arrows in the headings of meta data columns. The setting, Remember Timesheet State, within the Extra Settings widget of the Bulk Timesheet profile must be enabled in order to be able to sort columns.

Time Off Request: Multiple Days TOR Did Not Skip Holidays

Previously for TLM and TLM + Scheduler companies, time off requests for Multiple Days did not skip a day with a holiday.

Going forward, Multiple Days time off requests will now skip holiday days like Dynamic Duration time offs.

Bug Fixes

Dashboards: Could not add Detailed Calculated Time report

When users tried to add the Detailed Calculated Time report as a widget on their Dashboard, the report was not available to add. This is fixed, and the Detailed Calculated Time report can now be added as a Dashboard widget and supports charting.

Scheduler

Workflows

New Availability Change Request Workflow

A new Workflow Type has been added to Workflows, Availability Change Request. This allows employees to submit a request to change their availability with a workflow approval process. A default workflow for Availability Change Request is also available. All workflow steps are available to configure. You can have the notification sent to default accounts, such as Manager 1.

From Edit Scheduler Profile (Profiles/Policies > Scheduler Profiles), assign the Availability Change Request Workflow so that employees can submit a request. Employees can submit their request to change their availability from the Edit Availability/Preferences panel on the Availability/Preferences calendar screen (My Info > My Schedule > Availability/Preferences).

HR

Surveys

New! Surveys are now available within Wurk for HR enabled companies. Surveys help you understand and support people in a meaningful way, by aligning surveys to your organization's unique goals and needs, identifying trends that may be impacting engagement, productivity, performance, and more; at any time and from any device.

This functionality allows you to create custom or pre-defined surveys to send to your employees. Surveys can be defined to collect information vital to your organization, can be used to gather information on processes your employees or new hires have been using, or can simply be fun in nature. Even pre-defined surveys can be edited and customized. The system allows you to 1. Define the survey, 2. Send the survey, and 3. View survey answers.

Checklist Completed Notification Updated

The Full_Name system tag has been added to the Checklist Completed notification. When added, the employee's full name will display in the email and/or SMS message sent to the recipient.

Recruitment - Applications

Applicant Communications: Details Now Available

We have now provided admins and managers the ability to view the content of sent applicant communications in either email or SMS format. In Applicant Communications, entries in the Type column are now hyperlinked. When clicked, a pop-up will display with the communication details.

Applicant Communications is accessed from the Applicant Information page under Team > Recruitment > Candidates > Applicants, and then selecting the View Applicant icon for the desired applicant, then selecting the Communications tab.

- From the Applicant Communications widget, select either the Email or SMS hyperlink under the Type column. A pop-up will open displaying the details, including the To, From, Subject, and Message.

Note: Historical Details are not available for historical communications. This option is only available from the October 2021 release onward.

Job Applications: Recruiter Added PDF Downloads

Applicants will now have the ability to download their job applications in PDF for job applications added by a recruiter. Recruiters and hiring managers can also download an applicant's job application in PDF for job applications added by a recruiter. The PDFs will be a snapshot in time at the time of submission.

Recruitment: Offer Letter

We have expanded Offer Letter functionality to include applicant acceptance or declination of offers. This has multiple elements that include signature configuration pieces, manager menus, and applicant response.

- Offer Letters: Signature Type Configuration
- Offer Letters: Decline Reasons Added
- Offer Letters: Assigning Offer Letters to Applicants
- Offer Letters: Applicant Access to Offer Letters
- Offer Letters: Accepting an Offer via Digital Signature
- Offer Letters: Accepting an Offer via System Generated Signed Document
- Offer Letters: Accepting an Offer via Required Upload of Signed Offer
- Offer Letters: Declined Offers
- Offer Letters: Expired Offers
- Offer Letters: Accepted Offers

Organization Charts

Updates to Export

We have made some updates to the exporting of organization charts. These updates are in the pop-up after selecting the Export button.

Layout

Multiple pages - Split entire chart renamed to Multiple Pages - Entire Chart

Multiple pages - Chart per employee chart renamed to Multiple Pages - Per Employee Number of Levels Down

Pages - Per Employee Number of Levels Down

If value is >3, a warning will be shown to the user as follows: These selections may result in a large org chart that is better explored online than downloaded/printed. Consider selecting fewer levels or a multiple page layout.

Orientation when Exporting

Default will be Horizontal. Can change to Vertical. Applicable to single page and multi-page charts.

Alignment

Default will be Center alignment for Horizontal charts. Can change to Left or Right. Applicable to single page and multi-page charts.

Default will be Center alignment for Vertical charts. Can change to Top or Bottom. Applicable to single page and multi-page charts.

Cross Product

Checklist Panel: Left Side Support

The Checklist Panel has been enabled to be placed on the left side of the page. When the panel is opened on the left side, the page is pushed left to right at the same breakpoints that page content is pushed right to left for right side placement.

The screenshot displays the WURK HR system interface. On the left, a checklist panel for 'Emily Employee Jones' (Test EIN) (1007) is visible, showing a progress bar for 'Onboarding' (0% complete) and 'My Information' (0% complete). Below the progress bars, there is a 'Verify/Update Personal Information' section with instructions, a 'Due Date' of 08/09/2019 (Overdue), and a 'Waiting On' status of 'Emily Employee Jones'. A 'MARK AS COMPLETE' button is present. At the bottom of the panel, there is a link to 'Add an Emergency Contact'. The main content area shows the 'Confirm my Personal Information' form. The form includes a breadcrumb 'HR > HR Actions', a title 'Confirm my Personal Information', and instructions: 'Please go through the information below and adjust any information that needs updating.' The form fields include 'Effective From' (10/14/2021), 'Social Security' (999-99-5555), and 'Birthday' (01/01/1970). There are 'SAVE' and 'SUBMIT' buttons for each section.

Nickname Included in Search Results

Admins may only know an employee by their nickname, and therefore may want to locate them in the system by searching for that name. The search has been updated so that it now includes nicknames defined via the Account Information widget in the Employee Profile.

Dashboard Tab Library

Pre-Configured Links Widget for the Administrator Template Tab

Administrators with access to the Dashboard Tab Library and Administrator Tab Template now see a pre-configured Links Widget (Quick Links tab) in the template tab of the Dashboard Tab Library. When the Links Widget is removed from the Template tab, a newly added Links Widget will not contain the pre-configuration.

The admin is not able to save changes to the template, so the Links Widget configuration cannot be changed.

Start Widget Pre-Configuration for Administrator Template Tab

Administrators with access to the Dashboard Tab Library where an Administrator Tab Template is available can now see a pre-configured Start Widget in the Template tab of the Dashboard Tab Library. The preserved Start Widget in the Administrator Tab Template has pre-configured Links available under the following labels:

- My Account
- My Employees
- HR Maintenance
- Timekeeping & Audit Reports
- Scheduling
- Benefits & ACA
- Recruitment
- Payroll
- Our Company/Help
- Company Settings

Only icons, not images, are used in the pre-configured Start widget. Icon custom colors are used unless a theme other than the Standard UI theme is used, in which case the color from the selected theme is used.

If the Start Widget is removed from the Template tab, a newly added Start Widget will not contain the pre-configuration. Managers cannot save changes to the Template itself, so all Start Widget configuration changes are saved to a copy of the tab Template.

Links Widget Pre-Configuration for Employee Template Tab

Administrators can now see a pre-configured Links Widget (Quick Links tab) in the template tab of the Dashboard Tab Library. The Preserved Links widget in the Employee Tab Template has pre-configured Quick Links according to the list below.

- My Information
- My Time
- My Schedule
- My Benefits
- My HR
- My Career
- My Pay
- My Company
- My Reports

If the Links widget is removed from the Template tab, a newly added Links widget does not contain the pre-configuration.

Start Widget Pre-Configuration for Employee Template Tab

Administrators can now view/edit a pre-configured Start Widget in the Employee Template tab within the Dashboard Tab Library. The preserved Start widget in the Employee Tab template has pre-configured Links according to the list below.

- Employee Tab Configuration
- My Account & HR

- Time & Time Off
- My Schedule
- My Pay & Tax Forms

Custom colors for the Icons are used. If a System Theme other than the Standard theme is used, the color from the selected theme is used instead.

When the Start Widget is removed from the Template tab, the newly added Start Widget does not contain the pre- configuration.