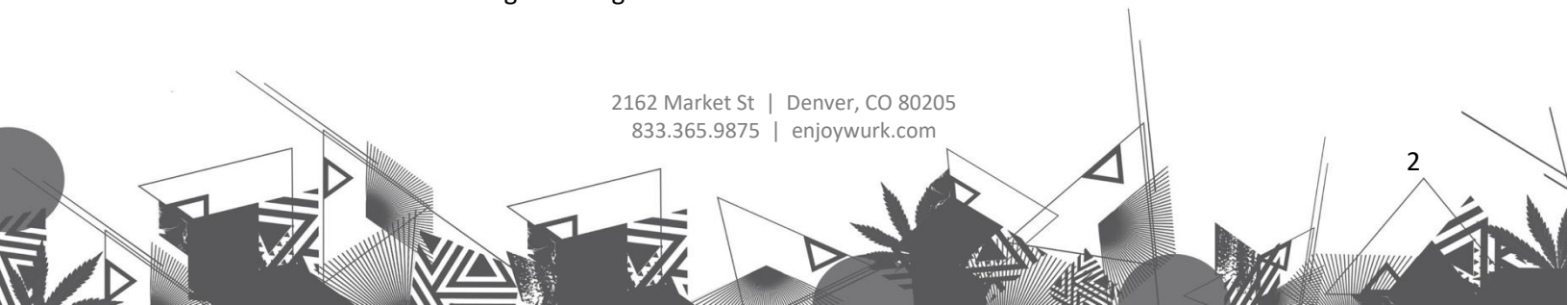


Wurk is a continually improving and evolving application. As part of our commitment to full transparency, we provide release notes that summarize the latest enhancements to Wurk functionality and usability.

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## PAYROLL

### American Rescue Plan Act

The system is updated with the following changes related to FFCRA and ARPA legislation:

- New ARPA earning codes are available for the updated taxation.
- The system calculates the OASDI tax credit as specified in the new legislation.
- Tax vendor files have been updated or will be updated soon.
- Wage limits have been updated or reset.

The 2nd Quarter Form 941 and instructions were finalized by the IRS on June 25, 2021. The system is now updated to calculate payrolls based on these IRS updates. If you paid an employee FFCRA wages on or after April 1, 2021, you must take action to move those 2nd Quarter wages to ARPA earnings codes. To guide you through the process, please read the [Converting Earnings from FFCRA to ARPA User Guide](#), which you can download from your system download locations.

### DE-4 From Update for California

The system now includes the new version of California withholding form DE-4.

### W-4 Form Update for Oregon

The system now includes the new version of Oregon withholding form OR-W-4.

## TLM

### Cost Centers

#### Payroll Taxation and Geo-Fencing No Longer Share CC Priority Field

Previously, if geo-fencing was set up based on a user's location that was also their tax location, priorities could not be separated due to the Priority field being shared between geo-fencing and Payroll taxation.

What's been added: In the Cost Center Tree, a Geo-Fencing Priority drop-down field has been added beneath the Priority drop-down field so that you have the option to distinguish which cost centers (geo-fencing (location) or priority (taxation)) are the higher/lower priorities.

Note: Any previous priorities saved in your Cost Center Tree will remain the same.

If you want to change the cost center priorities, select the drop-down for the applicable field and choose the appropriate number.

## Timesheet

### Added Employee ID Next to Name on Timesheet

For both Timesheet Profiles, the Employee ID will now by default display next to the employee's name on their timesheet.

| Date      | From    | To    | Raw Total | Calc. Total | Break/Lunch Column | Departments | Time Off | This is cost center 3 Long title |
|-----------|---------|-------|-----------|-------------|--------------------|-------------|----------|----------------------------------|
| THU Jul 1 | From am | To am | 8.00      | 8.00        | 0.00               | Grant 2     | FMLA     | Marks DX                         |
|           |         |       | 8.00 hrs  | 8.00 hrs    |                    |             |          |                                  |
| FRI Jul 2 | From am | To am | 8.00      | 8.00        | 0.00               | Grant 2     | FMLA     | Marks DX                         |
|           |         |       | 8.00 hrs  | 8.00 hrs    |                    |             |          |                                  |
| SAT Jul 3 |         |       | 0.00 hrs  | 0.00 hrs    |                    |             |          |                                  |

### Added Message for Zero Calc Hour Holidays

On the Calc Detail page, the system now displays an alert message when an employee receives Raw hours from a Holiday Table but the employee receives zero calc hours because the Pay Calc Holiday Eligibility settings make the employee not eligible. The alert message says: The calculated totals are zeroed by Holiday Eligibility rule.

### Highlight Missing Punch

For users who need to correct missing punches from the timesheet and would like an easier way to see missed punches, a new setting has been added to the Punch Settings section in the Timesheet Profile, Highlight Missed Punch.

When this setting is enabled (it is disabled by default) and a time entry has a missed punch based on the criteria set in the Timesheet Profile, the missed punch field in the timesheet will be highlighted in red.

|                                  |           |           |
|----------------------------------|-----------|-----------|
| WED Feb 6                        | 8:00 hrs  | 8:00 hrs  |
| THU Feb 7                        | 2:00 hrs  | 2:00 hrs  |
| 11:00 am   1:00 pm   2:00   2:00 |           |           |
| SHIFT MISPUNCH                   |           |           |
| 1:30 pm   hh:mm am   0:00   0:00 |           |           |
| FRI Feb 8                        | 15:00 hrs | 15:00 hrs |

This is helpful for managers who have a large number of timesheets to review each pay period, and would like missing punches to stand out on the timesheet so that they can see the missed punches quicker to correct them. For employees who typically do not have a lot of time to fill out their timesheet, having this setting enabled would allow them to see the missed punches more easily so that they can quickly correct them when filling out their timesheet the next day.

## Time Off Request: Submit Time Off Request from Timesheet

Previously, when users submitted a Time Off Request (not time entry based) from a timesheet, they had to switch to another page and then come back to the timesheet.

What's changed: Users can now submit a Time Off Request directly from the timesheet. For employees (with the Request Time Off permission enabled) and managers (with the Request On Employee Behalf permission enabled), a Request Time Off option is now available to choose from the three-dot ellipsis More Actions icon on the timesheet for both timesheet profiles. When this option is selected, the Request Time Off pop-up will display for users to enter details and submit the time off request.

Note: The availability of the Request Time Off functionality does not depend on the timesheet status (open, submitted, approved, locked). The Time Off Type field in the Request Time Off pop-up will be empty by default.

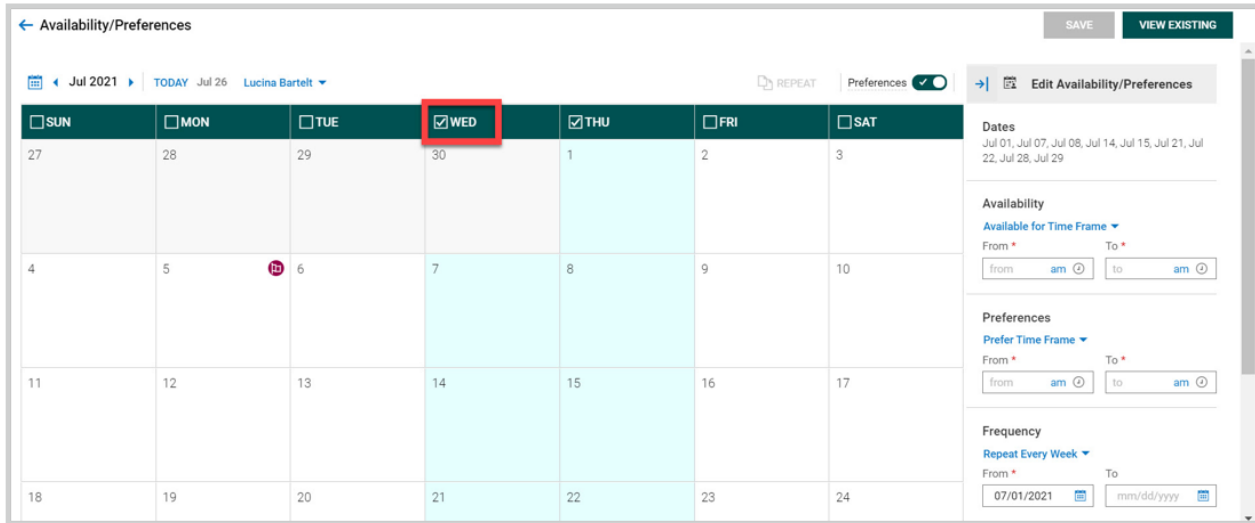
## Scheduler

### Availability/Preferences

#### Availability Calendar Weekday Selector/Input Component/Preferences Button

The following minor updates have been made to the Availability/Preferences calendar (under Schedule > Team Setup > Availability/Preferences):

- Checkboxes have been added next to the names of the weekdays so that managers and employees will know more readily that they can select the checkbox in order to select all the days for that specific weekday in the month.
- The browse and select for an employee's name was moved from underneath the Availability/Preferences header to next to the date.
- The gray bar at the top of the page has been removed.
- The Existing Availability/Preferences link was renamed to View Existing, and the button was moved to the top-right corner of the page.
- The Availability/Preferences pop-up window previously displayed in the middle of the page, and will now display in a panel to the right of the calendar.



## Shift Requests

### Time Off Requests to Look at Work Schedule Profiles in Advanced Scheduler

Previously, Advanced Scheduler employees could not request time off for a future date unless there was a posted schedule or the employee had defined working days in their Availability.

What's changed: The Advanced Scheduler engine will now look at an employee's Work Schedule Profile to see what days the employee would have been scheduled at that future time they were requesting time off so that the system will know when to apply time off and when to skip.

## Schedules

### Added Rule to Create Open Shifts and Allow Shifts to Remain Assigned for TO

Underneath the setting, Remove Employees From Scheduled Shifts On Days That Have Been Approved For Time Off, in the Time Off Policies widget (Global Setup > Company Setup > Global Policies), a new setting has been added, Keep Shifts Assigned To Employees And Create New Open Shifts On Days That Have Been Approved For Time Off.

When enabled, an open shift will be created when an employee is scheduled to work on a day that they later get an approved time off for, and the existing shift will remain assigned to the employee so that the employee will receive extra pay/shift premium (depending on what their scheduled time was). Enter the number of hours for the minimum threshold (such as the employee must request 3 hours of time off in order for this rule to trigger) in the When A Minimum Of \_\_\_ Hours Is Requested field next to the setting.

This setting is aimed toward users in countries with rules that employees are entitled to be paid the shift premium times they would have received if they had worked their assigned shift.

The original setting that is still available (Remove Employees From Scheduled Shifts On Days That Have Been Approved For Time Off) does not calculate this extra pay due to the shift becoming an open shift and no longer assigned to the employee.

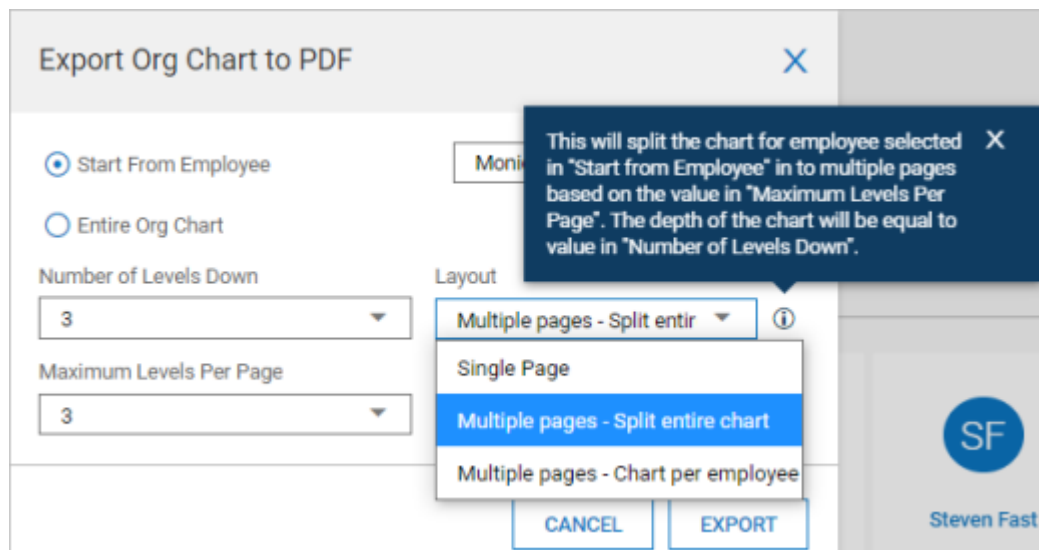
Tip: You can enable only one of these two settings at a time.

## HR

### Printing of Organization Charts

Managers wishing to share their organization with various stakeholders, such as new employees or others internal or external to their organization can now configure the organization chart export based on recipient requirements. This enables managers to export and use only the required level of data for their recipients. This is located under My Info > My Company > Organization Chart. The export will generate a PDF and in large organizations and selections, a warning will display to let users know the current selections may be better viewed online than printed.

From the Export button on the page, a pop-up will display allowing users to select their options. The organization chart can be exported by starting with a particular employee and then selecting the number of levels to be included (3-10 or All). The ability to export the entire organization is also available. Export layout options include Single Page, Multiple pages - Split entire chart, and Multiple pages - Chart per employee. Each layout option has an Info icon explaining how the export layout works.



## Forms

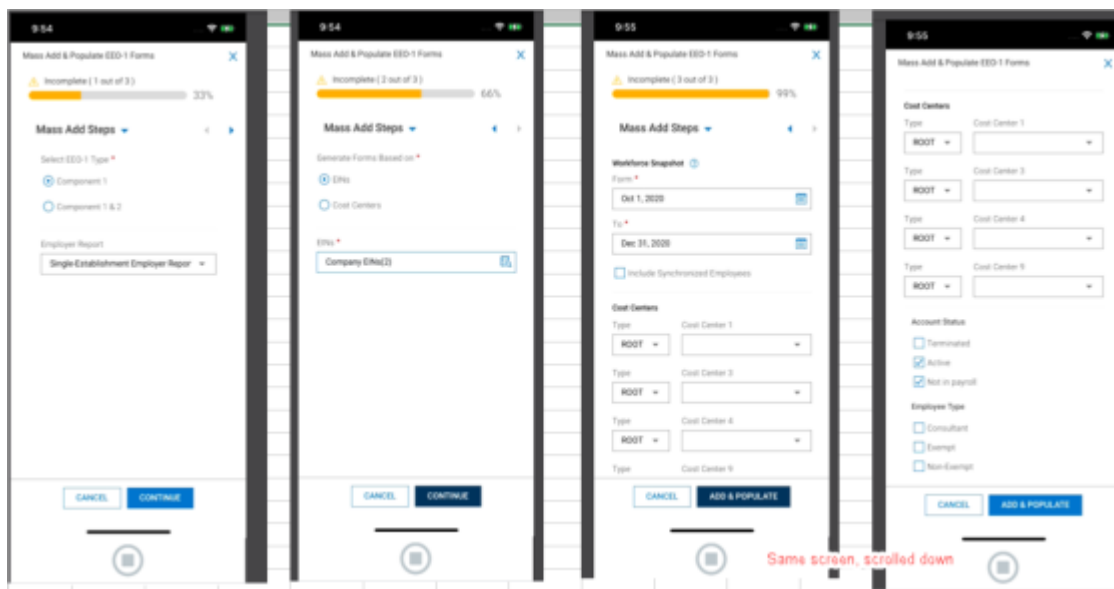
### EEO-1 Forms Preserve Settings in Pop-Up

In the EEO-1 Populate Form pop-up, when setting the filters needed to generate the form, the system will now save the settings so they will be available for subsequent population of the form. Previously, the settings would be cleared and users were required to enter the information for each subsequent use. The form is located under Team > HR > Forms > Government Forms > EEO-1.

## EEO-1 Mass Add & Populate

Users can now mass add EEO-1 forms by using the Mass Add & Populate button. When selecting this option, you will be presented with multiple steps to guide you through the process.

- Select EEO-1 Type: Select Component 1 or Component 1 & 2, and select Employer Report (single or multi establishment)
- Generate Form Based on: EINS or Cost Centers. If EINS, select which EINS are impacted. If Cost Centers, select cost center tree.
- Workforce Snapshot: Set dates for the time period (select dates between October 1 and December 31 of preceding year), optionally include synced employees, additional cost centers, account status, and employee type.



## EEO-1 Mass Edit

An Edit option has been added under the ellipsis of the EEO-1 report page. When selecting one or more forms, this button will allow common changes to be applied to multiple forms at the same time.

- All selected forms must have the same type; either Component 1 or Component 1 & 2.
- A form with blank fields will display for editing.
- Fields that are editable in a single form will be editable with mass edit. (Section D is not editable in single or mass)
- Clearing of fields not allowed.
- Not available in mass edit are: Download PDF, Electronic File, and Populate Form.
- Upon Save, any edited fields will be applied to all selected forms. If a field is left blank, the corresponding field in each of the selected forms remains with its previous value.



## EEO-1 Mass Delete

Users will now have the ability to mass delete EEO-1 forms by selecting multiple forms and then selecting the Delete option under the ellipses of the report page.

- A confirmation pop-up will display prior to deletion.
- If a form is in Pending status, a message will display indicating that forms with this status cannot be deleted.

## EEO-1 Report Page Columns Added

New columns can be added to the main EEO-1 report page which will display details about forms created using the Mass Add & Populate option. The data in the columns will not display for existing forms or single, manually created forms. The columns are:

- Population Status: Will show new forms with statuses of: Pending, Populated, and Failed.
- Generated For: Displays the EIN(s) and/or any cost centers associated with the selected EIN(s) for which the form was generated.
- Snapshot From: Date From and time stamp of the generated form. Dates are generated according to user's Locale settings.
- Snapshot To: Date To and time stamp of the generated form. Dates are generated according to user's Locale settings.

## HR Actions

### Employee Lookup Page Updated

When navigating to Team > HR > HR Actions and selecting employees for HR Actions including the Performance Review Profile and/or Succession Profile pages, the employee lookups have been updated to the newer single lookup common throughout the application.

## Recruitment - General

### Passwords: Validation and Error Handling

We have updated password validation for employees and former employees applying for a job through the career portal.

The system will check and validate users based on the Username. Based on their response, if the system cannot validate the user as a single account for a non-active employee, the system will not allow the user to proceed and will give one of the following errors based on the use case when the validation failed. Users' email and phone will be partially masked.

User identified as an active employee:

- Active employees must use the "Forgot Password" link in the Employee Login screen.

User's information does not exist in system:

- Invalid information for resetting your password. Please contact the company for assistance.

User's answer to security question is incorrect:

- Your answer to the security question is incorrect. Please try again or contact the company for assistance.

For returning employees:

When processing the account of the terminated employee who attempts to reset their password on the careers portal, the following actions will also take place.

- Account is unlocked
- Applicant Type changes to Returning Employee
- Security profile changes to Returning Employee security profile (set in the Applicant Tracking/Recruitment Configuration widget)

## Forgotten Password Flow - No Security Question on File

When an applicant selects Forgot Password, they will get a screen containing a Reset Password option, Username, Continue and Back To Account Login button.

Upon selecting Continue: If system validates the user, the next screen provides the following message:

- Your temporary password will be sent to one of the following options. If you do not have access or do not receive a response, please reach out to the company for assistance.

The Username will be sent to one of the following options, selected by the applicant:

- Personal Email (if on file, and will be masked)
- Primary Email (if on file and is not a duplicate of Personal Email, and will be masked)
- Secondary Email (if on file and is not a duplicate of Personal or Primary Email, and will be masked)
- Cell Phone (if company has SMS turned on and user has a cell phone number on file, and will be masked)

After selecting one of the options for delivery of the username, the user will select Submit. If no username or previous account exists, applicant can select Create New Account option. Upon selecting Submit, the applicant is taken to a login screen that includes a success message:

- New password was sent to you. Please follow the instructions provided.

The system will validate the applicant based on username. If system cannot validate user, the following message is given to the user:

- Your contact info is not on file. Please reach out to the company for assistance.

## SSNVS

### SSNVS Button Added to New Hire and Employee Profiles

We added the Social Security # Verification button in the hire page accessed from Employee Information, and to the Employee Profiles, which will allow verifications to be performed on existing employees. From the Employee Information report page, open one or more employee profiles for viewing and the button will be visible at the top.

## Cross Product

### Dashboards – General

#### New UI Dashboard - Links Widget (Quick Links)

Story: Users are now able to see Open Links from the Links Widget (Quick Links tab) in a new tab using right click. For users with access to the New UI Dashboard, where the Links widget is added to the Dashboard with at least one configured link in the Quick Links tab, when they right click on any Quick Link > Open Link, the respective link opens in a new tab.

#### Progress Bar on Save in Dashboard Layout Profile and Dashboard Tab Library

Admins now see a progress bar upon clicking Save in the Dashboard Layout Configuration and Dashboard Tab pages, so they can understand how long the process will take. For the Dashboard Layout Profile saving, the title for the progress bar shows Saving and a message reads Saving of layout is in progress. For the Dashboard tab saving, the title shows Saving and the message Saving of tab is in progress displays.

#### Inline Messages for Empty Dashboard Layouts

Admins can access the Add option from the Dashboard Tab Library pop-up, so they DRAFT can now add tabs to an empty layout. When an admin accesses a Dashboard Layout without any tabs, the system displays the following informational message: You can insert one or more tabs to this empty layout. Edit Tabs. When an admin clicks on the Edit Tabs button or the Edit Tabs hyperlink in the message, an appropriate pop-up appears with the message No data to display.

After an admin adds tab(s) to the Layout, the message disappears, and the following apply:

- The page-level buttons Reset Changes and Save become enabled.
- The Edit Mode toggle displays on the tabs panel.
- The Gear menu contains the On Entry Show item.

### Dashboard Tab Library

#### Updated Profiles Pop-Up in the Dashboard Tab Library

Users can now view how many profiles are associated with a Dashboard tab so they can track its usage.

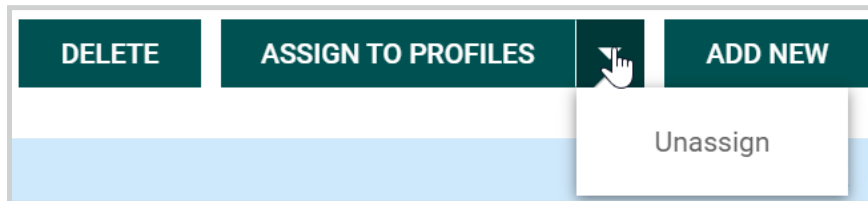
The system shows the list of Profiles and the Layouts where a tab has been assigned. When an admin clicks on the number in the Profiles column, the system opens a pop-up with the following columns:

- Grouped By (Profiles)
- Effective To
- Effective From
- Description

The Profiles column is primarily sorted in alphabetical order by default, then by a second level of sorting by the Effective From date, from oldest to most recent.

## Unassign action for dashboard tab library

Users can now unassign tabs from Dashboard Layout Profiles/Layouts so they can delete tabs that are no longer relevant. The Unassign page level action has been added to the Dashboard Tab Library report (Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library) as a drop-down option under the Assign action.



Upon clicking Unassign, a success message stating Dashboard Tab(s) were unassigned successfully appears on the page. If a user clicks Unassign without selecting any views, a message that reads Please select at least one tab appears on the page.

Note: The system skips Onboarding, Pre-boarding and First Day Package tabs with the following confirmation message: {Name of tab}: skipped.

## Save As Option for Dashboard Tabs

Admins can now save a copy of a tab so they can reuse the existing content of a tab and don't have to create a new one. When a user selects the appropriate tab and opens the View/Edit tab page, a Save button with a drop-down displays. Upon clicking the drop-down, users will see the option to Save As.

When an admin clicks on the Save As option, the Save Tab As pop-up opens where they can define the Name and Description of the copy of the original tab. Upon Save, the system saves the changes and redirects the admin to a new page. A new record appears in the Dashboard Tab Library report.

The Save As button is not available until an admin makes some changes to the tab as the Save button is disabled.

## Improvements to Assign to Profiles Lookup

Admins can assign/unassign previously selected tabs to/from Dashboard Layout Profiles/Layouts via one lookup so they don't have to leave the page to perform the unassign action.

## Messaging for Publish Changes Option

Admin can now see more relevant messages when working with the Dashboard Layouts and tabs so they can understand the actual status of the items. The following improvements have been made:

- When an admin clicks the Publish Changes button on the Dashboard Layout Configuration page, the system shows a success message that reads: Layout was published successfully.

- When an admin opens a past Layout with an empty Company Hub tab, the system does not show a warning message.
- When an admin opens a future Layout with an empty Company Hub tab, the system shows a warning message that reads: One or more of your Company Hub tabs are completely blank: [Tab Name(s)]. Layout will be activated on [Effective From Date].

## Add New Button on Dashboard Tab Library

Users with View and Edit permissions for the Dashboard Layout Profile can now add new tabs using the Add New option under Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library. Clone and Save As options are also available.

## Manager Tab Template

Admins can now create predefined tab templates for managers so they can be reused. When clicking on Add New at the top of the Dashboard Tab Library report, the system shows the Add New Tab pop-up where a user can select the Custom Tab type and define it as a template via the Template drop-down. Choices for the Template field are:

- Empty (by default)
- Manage

When a user selects the Manager option in the Template field, the system suggests a Name of Copy of Manager Tab, which the user can edit if desired. Upon clicking Continue in the pop-up, the system shows the Dashboard Tab page with a predefined set of widgets. If a user removes all widgets from the tab, the system shows the Add Sample Widgets button.

## Dashboard Widgets

### Links Widget/Quick Links Pre-Configuration for Template Tab

Managers can now see a pre-configured Links Widget (Quick Links tab) in the Template tab of the Dashboard Tab Library. A preserved Links widget in the Manager Tab Template includes pre-configured Quick Links such as:

#### My Information

- My Profile
- Change Password

#### My Time

- Timesheet
- Current Timesheet
- Historical Timesheets
- Change Requests
- Time Off
- Request
- History
- Balances

#### My HR

- Forms
- Government Forms
- 19s

## My Pay

- Pay History
- Forms
- W2
- Withholding
- Direct Deposits
- Benefits Statement

## My Reports

- My Saved Reports

## Time Reports

- Calculated Time
- Calculated Time Summary
- Summary
- Counters
- Time Allocation
- All Timesheet Documents
- All Timesheet Notes
- Attendance Board
- Detailed Hours Overview
- Exceptions
- Late/Early/Absent
- Missing Punches
- Time Off Calendar
- Time Off Calendar by Month

## My Team

- Employee Information

## Time

- Timesheets
- Timesheet Views
- All Timesheets
- Pending Approval
- By Pay Period
- Current
- Timesheets Approval History
- Change Requests
- Pending Timesheet Change Requests
- Time Off
- All Open
- Pending Approval
- Request

## Schedule

- Team Schedule View
- Overview
- Schedule Overview
- Weekly / Daily Schedule
- Weekly Schedule
- Schedule Entries
- Edit Schedule Entries

## HR

- Employee Maintenance
- Password Reset
- Password Unlock
- Reports
- Calendar
- Birthday Calendar by Month

## Turtles Widget Renamed and Updated

The name of the Turtles widget has been updated to Fun in both Admin and client companies in the Dashboards. This new name is reflected in the Add Widget pop-up, Rearrange pop-up, and in the Widget. The Allowed Widget permissions in security profiles have also been updated to Fun (New UI).

Users can now configure a Fun widget, which includes two animal types; Buffalo and Turtles Widget. The Show Turtles Widget option has been removed, and if users do not want to see the Fun widget (which is enabled where the Show Turtles Widget option was on), the tile can be removed from the Dashboard.

Users can switch between turtles and buffalo. The message above the animal selection tabs indicates how to activate one animal or another: Select the animal and background below. The Change turtles display settings has been updated to Change fun display settings.

Users can now view and interact with the new Fun widget, which includes two animal types: Buffalo and Turtles. For the new animal type, Buffalo, the following apply:

- Buffalos are shown from a top-down perspective, the same as turtles.
- Buffalos move in a realistic pattern, where they stop and walk on a certain frequency.
- Buffalos can move their head and ears.
- The same food as for Turtles is used.
- Buffalos move towards food when it is created via left-click/press.

## Employee Profile

### One Column Default Employee Profile Layout

The default layout for the Employee Profile has been updated to the Edit Tabs layout (Company Settings > Profiles/Policies > Security > Screen Layouts). The On Entry Show section has been removed, and a new checkbox, Show Profiles Panel, has been added.

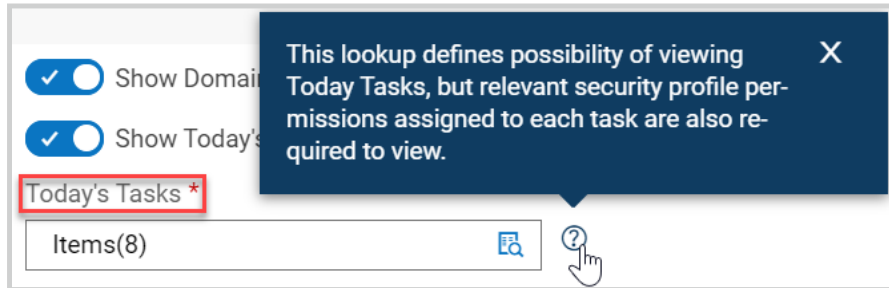
The profile has been changed to one column that the widgets can be added to. Column 1 widgets are listed at the top, followed by column 2 and column 3 widgets. Users can reorder the widgets however they like. The following widgets have been removed as options from this page:

- Notes
- Background Checks

## Marketplace Features

### Select Today's Tasks by Dashboard Profile

Administrators can now choose which Today's Tasks will be enabled for a particular group of users. A new Today's Tasks lookup has been added to Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles > Edit, and the lookup displays when the Show Today's Tasks toggle is enabled.



The lookup contains a list of all Today's Tasks available for that company. and if Today's Tasks are currently on, all Today's Tasks are selected by default. Users can select/de-select Today's Tasks to configure which tasks should display for users assigned to the Dashboard Layout Profile.

## Suite Experience and Platform Improvements Company Settings Icon in Hamburger Menu Updated

The Gear icon in the hamburger menu has been updated so the hover text now shows Admin instead of Company Settings or Settings.

## Breadcrumb Truncation Logic

When space does not allow full visibility of the last level in the menu path, the breadcrumb is truncated at the first level. When space is limited, the breadcrumb is displayed only for the first and last levels. When space is available, the breadcrumb is displayed in full.

## Delete Action in the Manage Existing Charts Panel

A Chart is now deleted when the user clicks Yes in the confirmation dialogue that pops up upon selecting the Delete action.