

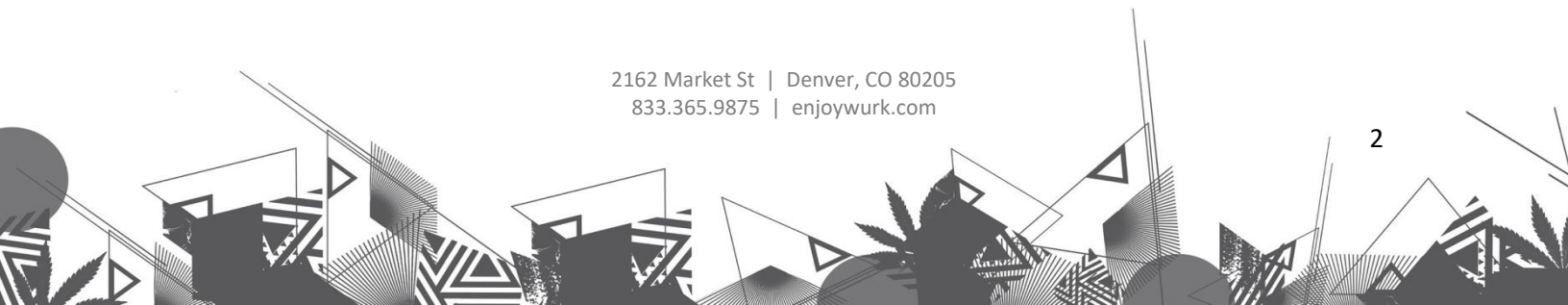
Release 83, October 2022

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

Unmask Option is Available for Vendor Bank Account Numbers

To ensure security of Vendor banking information, the system's default behavior is to mask Vendor direct deposit bank account numbers (display only the last four digits). In this release, a security profile's Direct Deposit field includes a new check box next to **Vendors** labeled **Unmasked**.

This check box is available at the Company level at **Profiles/Policies > Security** in the **Global Setup** widget, next to **Vendors**. It is also available at the Admin level at **Maintenance > Admin Company > Configurations Security Profiles**, on the Maintenance tab or the **Admin System** tab, next to **Vendors**.

For users who need to see the Vendor bank account numbers as unmasked, you can check this **Unmasked** check box in their security profile.

TLM

Time Off

New Time Off Request Team View

Managers and employees now have the ability to review their team's time off and scheduled days through the new Team View on the Time Off Request calendar.

Please refer to the following for more details.

Team View Configuration

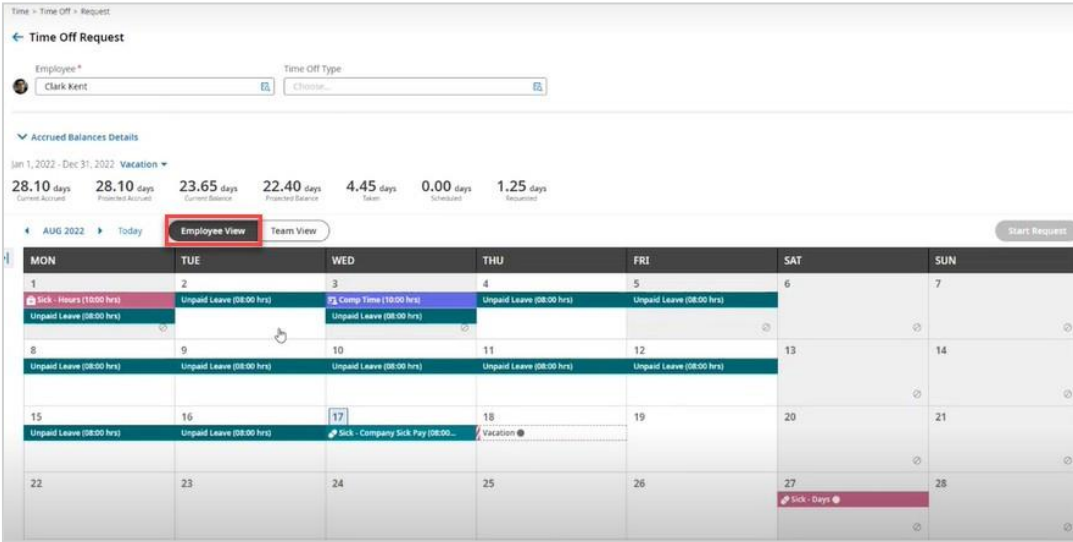
To allow employees and managers to utilize the Team View, enable the new **Team View** security permission located in the Time Editing/Approving Functionality section under the TLM tab in the Security Profile. For employees, enable Team View in the Time Tracking section under the ESS tab.

Next to the Team View security permission under the TLM and ESS tabs is an Options button. When you select the Options button, a Team View Options pop-up window displays an Employees To Show drop-down to choose Based On Groups, All Company Employees, or Based On Specific Filter.

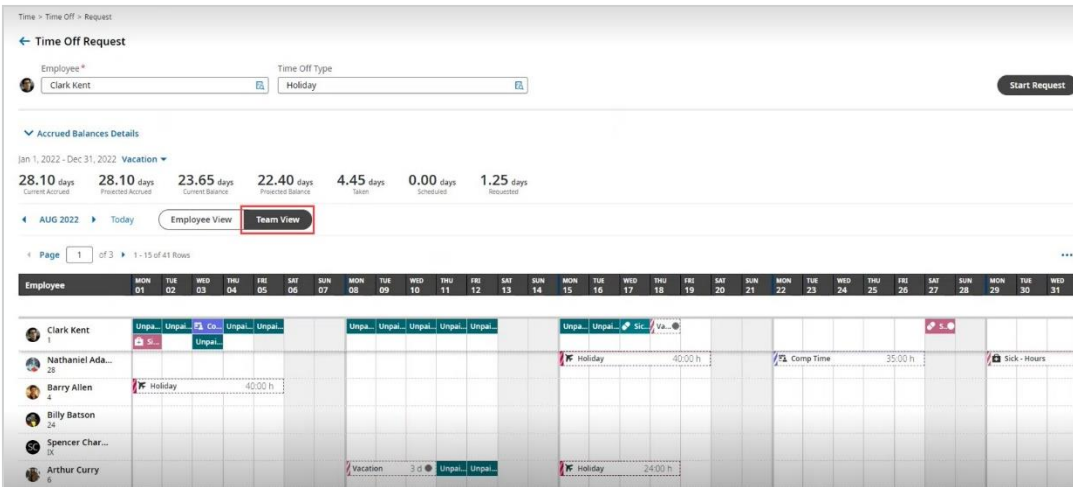
Team View on Time Off Request Calendar

On the Time Off Request calendar, two buttons display that users can select to switch views:

Employee View: This view shows an employee's own time offs and is what their manager sees when they submit on behalf of that employee.



Team View: This new view shows the employee's/manager's team and all team members' unscheduled days (shaded in gray), scheduled time offs and the names and amount of time of the time offs. When you select an employee's scheduled time off, a popover displays with their name, time off name and the number of hours, and a Documents paperclip icon for any attachments.



The name and the time off information of the selected employee from the Employee Lookup, as well as the Start Request button, will be pinned at the top of the Time Off Request calendar. When you scroll down the page, the pinned employee and Start Request button stay in view at the top.

If you are using the mobile version of the Team View, the Employee column is pinned to the left side of the screen as you swipe to the right to view more days in the month.

Note: Please contact the Support Team in order to turn on this view.

Scheduler

Employee Profile

Updated Edit Schedule Link for Advanced Scheduler Employees

For Advanced Scheduler employees, the **Edit Schedule** option from the three-dot ellipsis icon on the timesheet and in the Employee Quick Links and Actions pop-up previously navigated the manager to the TLM Weekly Schedule, which did not allow for shift editing.

What's changed: The Edit Schedule link from the timesheet and Employee Quick Links and Actions pop-up now navigates the manager to the **Scheduler Summary By Employee** report (Team > Schedule > Reports > Staffing > Summary By Employee). All scheduled shifts for the applicable employee display in this report, and the shifts can be edited directly from here.

Tip: When selecting the Edit Schedule option from the timesheet, the Scheduler Summary By Employee report filters by the timesheet dates, while selecting the link from the Employee Quick Links and Actions pop-up filters by this month.

Schedules

Multiselect for Import Workload Option in Schedules/Templates

Previously, workload templates could only be selected one at a time to import into schedules and schedule templates.

What's been added: A Select All column with checkboxes is now available in the **Import Workload Template** pop-up in schedules and schedule templates. This gives managers the ability to multiselect workload templates to import.

Scheduler Setup

Added Warning Message when Removing CC with Shifts

Previously, after a cost center was removed from an employee's profile, the employee's scheduled shifts associated with the removed cost center were not visible on the schedule, but the shifts were still assigned to the employee.

What's changed: When a cost center is removed from the Employee Profile, the following warning message will display to warn the user to remove any unnecessary scheduled shifts from the cost center:

Make sure to remove unnecessary scheduled shifts currently assigned to employees with scheduled cost centers being removed. Do you want to continue to remove the selected cost center(s)? warning message is displayed in attempt to single/mass delete of Scheduled Cost Center(s) on Edit Employee and Cost Center/Skills pages.

Shift Requests

New Partial Shift Coverage Request

If an employee needs part of their scheduled shift covered, employees can now submit a partial coverage request.

To submit a partial coverage request, navigate to My Schedule > Schedule and select the Manage Shift link for the applicable scheduled shift. From the Shift Change Request pop-up window, select Request Coverage. At the top, details on the shift including the date, time, cost center, duration, and skill display. Beneath the shift information, select Full shift, 1st half, or 2nd half of the shift that needs to be covered.

Shift Change Request
✕

Current shift details

Shift Date	Shift Time	Duration	Cost Centre	Lunch	Skill	Notes
16 September Fri	04:00p - 06:00p	02:00 hrs	Texas/Houston/Ashf... ⓘ	00:00 hrs	Youth Dev	N/A

Are you unable to work all or a part of you scheduled shift? You can swap your shift with a qualified employee or ask them to cover the shift for you.

Shift Swap
Request Coverage

● Full shift

04:00 pm - 06:00 pm

02:00 hrs

Selected

● 1st Half

04:00 pm - 05:00 pm

01:00 hrs

Select

● 2nd Half

05:00 pm - 06:00 pm

01:00 hrs

Select

Qualified employees

Who do you want to cover your shift?

Select all (7)

- Kimberly Mccray
- Arlie Finch
- Barbara Clements
- Justin James Watt
- Carol Whitfield
- Chris Paul
- Betty Sweet

Cancel
Submit

Example: If an employee's shift is from 9:00 AM - 1:00 PM, the 1st half of the shift is 9:00 AM - 11:00 AM, while the 2nd half of the shift is 11:00 AM - 1:00 PM.

Once the full or partial shift time that needs to be covered is selected, any qualified employees that can work that selected time period will display and the employee can select one or multiple qualified employees to send the request. Select the Submit button to send the coverage request.

When a partial coverage request is submitted, the To-Do items for both employees and managers reflect the partial shift start and stop time.

HR

Benefits

Benefit Census Report Updated with Dependent Information

Multiple Dependent columns have been added to the Benefit Census Report. These added columns prevent Admins from having to pull the information from multiple reports. The columns are not in the report by default and must be added via the Add/Remove Columns option.

The columns begin with the prefix: **Benefit Plan Dependent** and includes:

- Address: Address 1 - 3
- Address: City
- Address: State
- Address: Zip Code
- % Of Distribution
- Age
- Birthday
- Coverage Date From
- Coverage Date To
- First Name
- Gender
- Is FT Student
- Last Name
- Relationship
- SS#
- Type

Checklists

Checklist Auto Assign Filters

Administrators can now choose a set of criteria to determine when a Checklist should be assigned to an existing employee. An **Auto Add to Current Employees** filter has been added to the Checklist configuration page, and is unchecked by default. When selected, a user meeting the selected criteria via the filter is assigned a Checklist.

Supported filters match what's currently available for a New Employee filter with the following exceptions:

- Employee Filter
- Employee's Manager

Employee Maintenance

Preferred Pronouns Added to Employee Profiles

A new Preferred Pronoun field has been added to the Account Demographics widget in employee profiles. This is an optional field and selections made here are informational in nature so those accessing the employee record can address employees according to their pronoun preferences. The field contains a drop-down of options, including:

- (blank)
- He/Him/His
- She/Her/Hers
- They/Them/Theirs
- Ze/Zir/Zirs
- Ze/Hir/Hirs

HR Actions: The Preferred Pronoun field has been added to the My Information HR Action as an HR Action Item.

Data Retention: The preferred pronoun field in the employee profile will behave the same as the other employee record fields in terms of the company's Data Retention policy.

PDFs: This field will be added as an available column in the Employee Information report page. This is not included by default and should be added and saved. The field will also be included in the employee profile PDF.

Imports: These fields have been added to the Employees import (XLS & XLSX version). On the Instructions tab, in the Demographics section of Column B, it is titled, Preferred Pronoun and the row contains the details/instructions for filling in the field on the Template tab.

The Preferred Pronoun field should include one character, a number between 1-5. The numbers correlate to the values below:

- 1 - He/Him/His
- 2 - She/Her/Hers
- 3 - They/Them/Theirs
- 4 - Ze/Zir/Zirs
- 5 - Ze/Hir/Hirs

This new column was not added to the Template tab by default. If you add this as an available column, the system recognizes it during the import process. When this field is added to the template and populated with 1, 2, 3, 4 or 5, this updates the employee record with the corresponding value in the

Preferred Pronoun field. If this field is added to the template and not populated with either 1, 2, 3, 4 or 5, the field is skipped entirely and the import continues to run.

Note: If you are not yet tracking preferred pronouns and want to, please contact our Support Team.

Masking of National ID Numbers

National IDs Masked in Multiple Places in System

The National ID# that appears in the following places will now be masked by default (all except last 4 digits). Previously, the number fully displayed, which could be security concern.

- Benefit Questionnaires / Benefit Questionnaire Answers Report
- SSNVS Requests
- E-Verify Requests
- HR Actions: Any of the National ID items (Social Security Number, Citizen Service Number, National Insurance Number, Social Insurance Number)
- Custom Forms: Any of the National ID items (Social Security Number, Citizen Service Number, National Insurance Number, Social Insurance Number, Social Security Number France, Tax File Number, Other National ID types)

Security Settings

- If the user has access to 'View Unmasked' in their Security Profile for that National ID type, it will be masked by default but user can click the “eye” icon to view it unmasked.
- If the user does not have access to 'View Unmasked' for the National ID type, the number will appear masked with the eye icon disabled.

In the HR Tab of security profiles, for all National ID types, (under the Employee and Recruitment sections), a new tooltip has been added which states:

"For viewing in reports, these settings will apply to both employee and recruitment reports"

Benefit Questionnaires

For employees completing their own Benefit Questionnaire, for employees with permission to view their own National ID#, the number will be masked by default (all except last 4 digits) and the employee can select the eye icon if they want to view it unmasked since it is their own National ID (there is no separate security in ESS for View Unmasked.) In the PDF of the Benefit Questionnaire, the employee's National ID number will be masked, except for the last 4 digits of the number.

SSNVS & E-Verify

Regardless of whether the user has 'View Unmasked' or not, the information that sends to the Social Security Verification Service (SSNVS) will be unmasked so they can verify against the full SSN.

Regardless of security settings, the information sent to E-Verify via API will be unmasked so they can verify against the full number. Downloaded and/or printed E-Verify Confirmation from the PDF option from an E-Verify case will contain the entire number, unmasked.

HR Actions

For employees completing their own My Information HR Action, the employee's National ID# (should they have permissions to view) will be masked by default (*** all except last 4 digits) and employee will have to click the eye icon if they want to view it unmasked. As it is their own National ID, there is no separate security in ESS for View Unmasked.

For MSS, If "Override Security Restrictions" is enabled inside the HR Action Item for the SSN/National ID, since this overrides the users existing security permissions for SSN/National ID, with this enabled, user can view SSN/National ID unmasked via the "eye" icon.

Custom Forms

For employees completing their own Custom Form, the employee's National ID# (should they have permissions to view) will be masked by default (*** all except last 4 digits) and employee will have to click the eye icon if they want to view it unmasked. As it is their own National ID, there is no separate security in ESS for View Unmasked.

Recruitment

Applicant Portal: Customizing Applicant Log In Screen

A new **Applicant Login Message** section has been added to the **Log In** widget under **System Themes** so you can customize the message applicants will see when logging in to the applicant portal. This section has a full text editor and works the same as the Employee Login Message. This is accessed under Settings > Global Setup > Look & Feel > System Themes.

Applicant Portal: Login Screen Updated

Updates have been made to the Applicant log in process and pages. When the applicant selects Log In from the Careers Portal job search page, the applicant will be taken to a login page that includes the following updates.

- **Page level message with Info icon (updated):** Have you worked here before? If so, enter the username you used when you worked at this company or use your personal email address you used for your account.
- **Username error message (updated):** Hmm...We don't recognize those credentials. Try again?
- **Password error message (updated):** Hmm...We don't recognize those credentials. Try again?
- **Locked account error message (updated):** Your account is locked. Please contact company for assistance.

Options exist to allow applicants to retrieve their forgotten usernames and passwords, as well as creating a new account if they are a new applicant. If creating a new account, the screens and fields will prompt and guide the applicant through the process (email, password, etc.)

Cross Product

Password Policies

New Account Default Password Configuration Updates

The **New Account Default Password** options within the Password Policy widget have been updated and now include only two options. The previous first option for **Use Last _ Digits Of Social Security** has been removed. Original options 2 and 4 have now been combined into a configurable option that is populated by default. **Unique Per Account** is enabled by default.

A reset option that changes the password back to the company assigned password is now included. Users can change the password as long as it meets the current Password Policy.

These options are for both the Password Policy: Low and Password Policy: High.

Reports

New Columns in the Employee Information Report

WFR-316629: Users with access to the Employee Information report can now add the Description and Job Description (from the Job) columns to the report via Add/Remove Available Columns. When these columns have been added to a Saved View of the Employee Information report, they automatically display and populate when that Saved View is accessed.

Description

When added to the Employee Information report, the Description field populates based on the Default Job as of the system date. The field only populates the short Description, and then displays the **Show More** hyperlink. On clicking the hyperlink, the full description displays and a **Show Less** hyperlink is shown.

The Description column filters and sorts just as it does on the Jobs page.

Job Description

When added to the Employee Information report, this field populates based on the Default Job as of the system date. The system displays the Job Name in the Job Description column. Upon clicking on the Job Name, a dialog opens to show the full description.

If the Job Description is blank, nothing displays for that row.