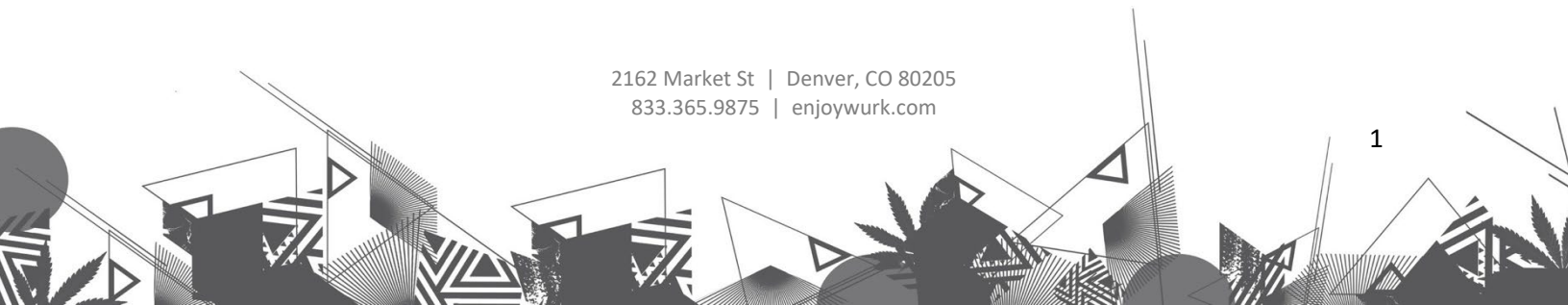


Release 86 April, 2023

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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General

Report Hub

As of this release, the Report Hub is now fully released and no longer considered a beta feature and the beta label will be removed from the menu. It has been available since August 2022 and we have been continually adding new features with each release.

TLM

Updated Exception Notification TS Rule to Trigger On Punch

Previously, the **Send Email Notification When Exception Is Created** Timesheet rule was only available upon Save. Going forward, the Send Email Notification When Exception Is Created rule is now also available within the On Punch section.

Scheduler

Week View for Basic Scheduling

The Scheduler Week view is now an available view (under Scheduling > Basic Scheduling > Schedules) for TLM Basic Scheduling so that managers can view and create employee shift assignments. Employees and shifts assigned from Basic Scheduling (daily rules or Work Schedule Profile) are visible in the Week view.

Shifts display the following information:

- Daily Rule Name (when defined)
- Defined colors (for daily rules that are displayed for shifts)
- Fixed Shifts
- Floating Shifts
- Flexitime
- Freeflow
- Shifts with the previous day start indicated
- Shift attributes assigned pop-up
- Read-only pop-up for Scheduler Profile employees

Note: Cost Centers are not displayed on shifts; cost centers only display when you open the pop-up

A Total Scheduled Hours column displays employees' total scheduled hours, which also reflects time off hours based on time off configuration. Weekly Contracted hours is displayed in this column when enabled in Display Settings.

A checkbox for mass employees selection is available from the Week view. Users can select the on Page option which selects all employees (who are active for selection) on the current page. The All option allows users to select all employees who are active for selection.

Tip: The maximum number of employees who can be selected at one time is 200.

A headcount shows at the top of the schedule table for each day the number of employees scheduled.

Note: Time off is not included in the headcount.

In the Display Settings panel users can enable the Show Time Offs and Show Pending Time Offs checkboxes in order for employee time offs and pending time offs to display in the Week view.

A Scheduled Employees Only filter is also available, and when enabled, only employees that have a shift will be displayed. Users can sort by the following:

- Shift Start Time
- EmployeeID
- First Name
- Last Name
- Start Date
- Hire Date
- Base Comp
- Re-Hired Date
- Seniority Date

From the Filters panel managers can filter by the following in the Week view:

- Employees
- Time
- Cost Centers
- Duration
- Shift Type
- Shift Premium
- Workday breakdown
- Day Type

When you select an empty day cell in the Week view an Add Schedule pop-up displays. If you select a day that contains an assigned shift, the pop-up will display the details of that shift.

Managers have the option to save/manage views and print.

HR

Benefits

Benefit Census Report: Filtering Added to Plans

We are providing the ability to filter all columns for the various benefits plans listed in the Benefit Census Report. The following has been done for this report:

- Added a filter for all columns with a benefit plan name.
- Filtering looks and behaves in same way as exiting filters on the report.
- If saving the view, the filtering will also be saved.
- When exporting, filtering on columns showing filtered data will display in the export.

Pre-Requisites: HR Sub system, Ready Benefits and permission to Benefit Census Report

Benefits Enrollment Summary: As of Date Selector

Historically, the Benefits Enrollment Summary provides options in the Print Settings for timespans such as Current, Future, Past etc. but has not provided for an "as of date" to show all plans active as of a certain date.

For example, your company's dental plan may run 12/1/2022-11/30/2023 and all other benefit plans run 1/1/2023- 12/31/2023. When running the Benefits Enrollment Summary, you would like to show plans as of Jan 1, 2023 but print the summary in December during open enrollment. This required you to print two separate summaries. One for 'current' for the dental plan and one for 'future' for the other benefit plans.

In this release, we are providing **As of Date** as a selection in the Benefits Enrollment Summary so you can view a summary of all employee plans active as of that date.

Checklists

Deleting Checklist Assignments: Removing Associated Data

When deleting a checklist assignment from an employee, the system will now delete incomplete Government Forms, HR Actions & Custom Forms that were assigned to that employee via the checklist.

This occurs when checklist deletion is done via the following methods:

- HR > Checklists > Checklists
- HR > Checklists > Checklist Items
- Checklist Employee Profile Widget

Upon deleting, the following can be expected:

A message displays stating: "This action cannot be undone. Would you like to delete only this checklist or this checklist and all incomplete Actions and Forms that were assigned via this checklist?" You will have the option to select one of the following:

- Cancel
- Delete Checklist Only
- Delete All

If Delete All is selected, all incomplete items and objects that were created as part of the assigned checklist will be deleted. Incomplete objects are those items that haven't been through the full flow of approval or been system verified.

- Government Forms: For Government Forms, this applies to those that haven't passed through the final verification/approval step.
- Custom Forms: For Custom Forms, this applies to those that haven't reached the END step of its workflow. For Custom Forms without a workflow, this applies to those that have not passed through the Verified step.
- HR Actions: For HR Actions, this applies to those that haven't reached the END step of its workflow.

Custom Forms

Account Contacts: Security Permission Allows Management of Contacts in Custom Forms

The **Employee Contacts** (View/Edit Custom) security permission that allows or restricts users from managing or adding certain employee contacts was previously not being applied to Account Contacts in Custom Forms. This has been updated and now this security permission will be applied to users updating Account Contacts in Custom Forms.

Recruitment

Recruitment: Job Requisitions becoming "Closed and Filled" are staying as Active

When a job requisition was filled, and the **Auto Change Status To Closed and Filled When Filled** checkbox was marked for the requisition, the requisition was marked "Closed and Filled", but sometimes remained active. This has been fixed, and the job requisition now becomes inactive when filled and the **Auto Change Status To Closed and Filled When Filled** checkbox is marked, as expected. Additionally, the Hire Applicants Count will be accurate if hiring multiple employees for an open (and then closed) job requisition.