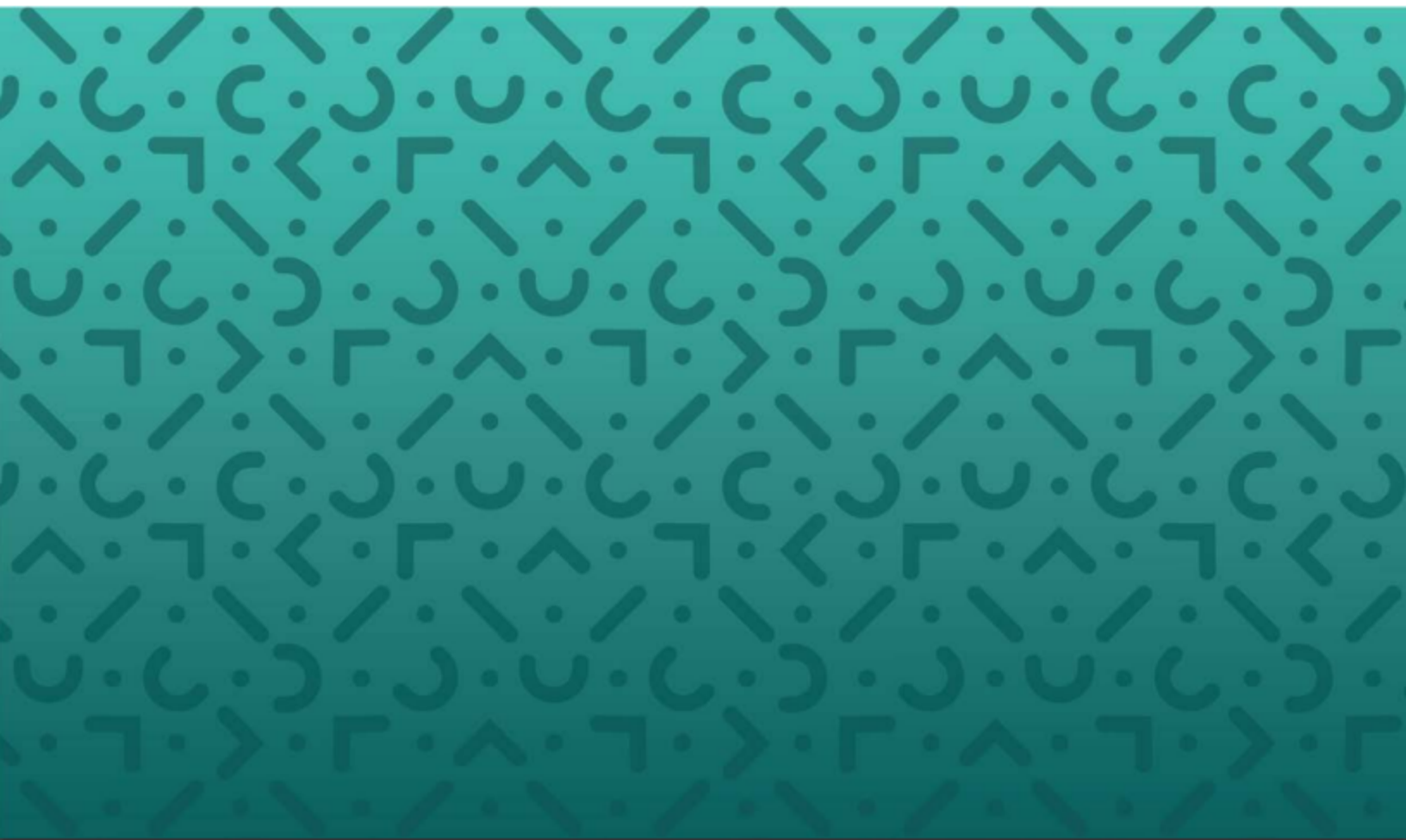# UKG

Summary Release Notes

April 2021

R74

This document contains a summarized description of
all enhancements for the release date / month shown above.
It does not contain bug fixes. For more details on any listed
enhancement, download the fully detailed release notes for the
product line (HR, TLM, Scheduler, Payroll, Cross Product).

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3040 Route 22 West, Suite 200, Branchburg, NJ 08876

Phone: 908-722-9952; Fax: 908-722-2153

Support: 1-800-394-HELP (1-800-394-4357)

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R74 Summary Release Notes

This document contains summarized descriptions of enhancements for the specified release for all product lines. To view more details, refer to the regular detailed release notes for each product line (HR, TLM, Scheduler, Payroll, Cross Product).

Release Dates

A System Release will take place on the following dates and times for the following servers. System downtime for each respective release can be expected during the maintenance windows:

- **EU Server:** April 05, 2021 at 11:00pm - 3:30am BST
- **POD 60:** April 06, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD2:** April 07, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD5:** April 21, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD4:** April 21, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD3:** April 22, 2021 at 11:30pm - 4:00am EDT
- **AUS Server:** April 22, 2021 at 12:00am - 4:30am AEST
- **U.S. Server POD6:** April 22, 2021 at 11:30pm – 4:00am EDT

Supported Operating Systems and Browsers

The following tables show the operating systems and browsers currently supported.

> **Note:** All of these operating systems and browsers are supported, but some may not be actively tested.

Platform	OS Version
Desktop	
Windows	10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

Browser	Version
Internet Explorer	11
Microsoft Edge	latest
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

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Downloading Documents

UKG Ready Customers

Download release notes and user guides under:

- **My Info > Help > Download Documentation**

Partner Resellers

Download release notes and user guides under:

- **Distribution > Tools > Download Documents**

TLM Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed TLM release notes for April 2021.****

💡 We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

Time Prep

NEW Time Prep (Mobile)

Time Prep has been converted to the Mobile App. All general Time Prep functionality is the same, with the following new features:

- The Time Prep process is adaptive to all screens, and all functionality can be performed on any device

- Processes are grouped by Type to more easily navigate Time Prep

- Steps will visually be marked as completed via a visual task bar at the top of the screen so that users can identify progress through the payroll process

- Mass Process Pay Periods

Payroll Metrics

> 🇦🇺 **Only for Australia:** The following enhancement is currently available for Australian users.

Import Actual Hour Per Week if LSL Average Hours is Zero

WFR-211133: Previously, when transferring Payroll Metrics Leave Balance to UKG Ready, in some instances, the user could choose not to use the **Average Long Service Leave** (LSL) **Hours Per Week**, which would result in all employees incorrectly having an LSL value of 0 in UKG Ready.

What's changed: If users choose not to use the Average LSL Hours Per Week in Payroll Metrics, the **Actual Hours Per Week** value will be multiplied by the number of weeks accrued and transferred into the employee's Accrual balances in UKG Ready.

Accruals 1.0

> **1.0** **Only for Accruals 1.0:** The following enhancement currently affects Accruals 1.0.

Accruals 1.0: Default Time Off Balance Cards to Hours Instead of Days

WFR-184837: Previously, when both hours and days were configured to display in the Accrual Balances, the system displayed the **Day** balance cards by default in the **Time Off Balances** cards page.

What's changed: When hours and days are configured, the **Hour** balance cards will display by default instead of the **Day** balance cards.

Accruals 2.0

> **2.0**   **Only for Accruals 2.0:** The following enhancements currently affect Accruals 2.0.

Accruals 2.0: Ability to Subtotal Accrual Balances Report

WFR-186864: In Accruals 1.0, users can sum up all hours/days values and balance liability in report groups, as well as allow for showing/exporting subtotals only. This is now available for Accruals 2.0.

Accruals 2.0: Custom Accrue: Fixed Grant and Tenure Based Grant Rules

WFR-80104, WFR-213974: Within the **Fixed Grant** and **Tenure Based Grant** Accruals rules, a new option, **Custom Accrue Period**, is available. This gives you the ability to choose a custom accrue period.

Accruals 2.0: Monthly (Simple Schedule): Fixed Grant and Tenure Based Grant Rules

WFR-80103, WFR-213965: Within the **Fixed Grant** and **Tenure Based Grant** Accruals rules, from the **Entitlement is defined per** drop-down, a new option is available, **Monthly (Simple Schedule)**. You can then define the day of the grant period, as well as enter a number of hours an employee will earn for each month during a calendar year.

Accruals 2.0: Prorated Calculated Based on Time Offs in Period

WFR-220679, WFR-220682, WFR-220687: In **Days** type time off Accruals policies, for **Fixed Grant Rule: Proration**, **Tenured Based Grant: Proration**, and **RTT Grant Rule**, a new section has been added, **Time Off Taken Proration**, which will take into account any time off taken within the Grant Period and prorate the grant the employee receives for that period.

InTouch

InTouch DX Update

WFR-229756: Firmware for InTouch DX clocks has been updated to version 1.2.0.143.

Leave of Absence

LOA Rule Now Allows 12-Month Period Measured Forward

WFR-212319: UKG Ready now accommodates the Department of Labor's rolling 12-month forward leave period. A new option, **Use 12 Month Forward Measurement Period**, has been added to the Leave of Absence Profile rule, **Expire Leave Time Taken**. When enabled, the leave taken time balances will be tied to this 12-month forward measurement period. After 12 months from the first date that a specific leave type was taken, the balance will reset.

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Pay Calculations

Pay Calculations Profiles Rules Structure in Configuration Documents

WFR-209227, WFR-209223, WFR-209219, WFR-220965, WFR-220166, WFR-220155: For companies utilizing Pay Calculations 2.0, users can download an easily understandable Configuration Summary document so that non-technical audiences can digest the document. The following Pay Calculation rules now have a customized structure in the PDF configuration document:

- Round All In/Out Time, Including Breaks and Lunches (v.2)

- Holiday Eligibility (v.2)

- Sum Up Time Off Hours By Day To Default Counter (v.2)

- Sum Up Time/Piecework By Day

- Distribute By Workday Breakdown

- Deduct Lunch (v.4)

Pay Calc 2.0: CA Double Time OT Not Calculating Correctly

WFR-222646: Previously, the **Nth Day Consecutive** rule assigned all of an employee's time on the nth consecutive day to the Consecutive Day OT counter instead of splitting the time over the nth hour on the nth consecutive day between Consecutive Day OT and Consecutive Day DT.

Going forward, the rule will now properly split time on the nth consecutive day between the Consecutive Day OT and Consecutive Day DT counters based on what is configured in the rule.

Pay Calc 2.0: Exception Based on Lunch Not Applying Correctly

WFR-222656: Previously, when an employee entered two or more time entries, the **Exception Based on Lunch** rule considered the total entered hours as opposed to processing the hours separately. This would cause a penalty for one shift to be applied to each shift.

What's changed: When there is a break in the day with two or more shifts, the meal penalty in the **Exception Based on Lunch** rule will now process the hours separately.

Pay Calc 2.0: Floating 24 Hours OT Rule Not Allocating Hours

WFR-213761: Previously, when the **Floating 24 Hours Overtime** rule was used in conjunction with the **Start All Cycles Based On First Punch Of Pay Period** setting within the rule, the system would not reference the first punch of the pay period to determine a period start time. The rule would not allocate on the next time entry for time worked within the 24-hour period starting from the first In punch time.

Going forward, this newer version of the rule follows the setting to work as expected and the system will reference the first punch of the pay period and apply overtime when an In punch occurs prior to this first In punch of the period.

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Pay Calc 2.0: Weekly OT Based on 32 in a Holiday Week

WFR-40632: Previously in the **Weekly Overtime** rule, there was no way to isolate holiday hours occurring in the week.

What's been added: In the **Assign Time Over** section of the **Weekly Overtime** rule, a new field has been added, **On A Holiday Week,**to define when overtime starts on a week that includes a holiday without having to include the holiday granted hours into the weekly overtime.

Payroll Export Format

Payroll Export Hours with Comma H,00 Format Exported as H.00

WFR-182290: Previously, when exporting a payroll export with the time format and locales set with a comma decimal separator, the export file exported as a point.

What's been added: A new option, **Use Decimal Separator Defined In Company Locale**, has been added to **Edit Payroll Export Format**. When enabled, the payroll export file will export with a comma decimal separator if configured in the company Locale.

Updated iHCM Payroll Export Format to Support Half Day Absences

WFR-226289: For companies that need to import dynamic duration time off data and absences such as half day absences into iHCM where there are no start and end times, a new option, **Duration Based**, has been added to the Time Off record for the following columns:

- **Half Day (column 28):** Y will display if the pay record contains Half Day, First Half, or Second Half duration types, otherwise it will display as blank.

- **Scheduled Day Part (column 12):** 1 will display if the duration type in the pay record is Full Day, otherwise it will display as blank.

- **Day Part (column 17):** 0.5 will display if the duration type in the pay record is First Half, Second Half, or Half Day, otherwise it will display as blank.

- **Start Day Part Code (column 26):** S will display if the duration type in the pay record is First Half, otherwise it will display as blank.

- **End Day Part Code (column 27):** E will display if the duration type in the pay record is Second Half, otherwise it will display as blank.

Points

Category Update

WFR-228220: On the **Points Balances** report, users can now add Points without a Category. Previously, the **Category** field was required.

Points Rule Did Not Trigger Correctly

WFR-121630: Previously, when points were configured using Late/Early Leave and set a list of excused time offs, when the start/stop excused time off entry was used in combination with hours worked, the points rules triggered incorrectly.

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Going forward, points will be accrued in Late/Early Start and Late/Early Leave rules with excused time off. Points will not accrue when users enter hours worked in combination with start/stop excused time off in all the views.

Reports

Split All Time Entries Report Views

WFR-211219: Previously, the Time Entries reports were only available from **Current view > View By** in the **Approve Time Entries** report.

What's changed: The Time Entries reports (**All Time Entries**, **Approve Time Entries**, and **Time Entry To Do Items Pending Approval**) are now available Menu items under **Team > Time > Timesheets > Time Entries**.

Split Change Requests Report Views

WFR-210516: Previously, the Change Requests reports were only available from **Current view > View By** in the **Timesheet Change Requests** report.

What's changed: The Change Requests reports (**Timesheet Change Requests** and **Pending Timesheet Change Requests**) are now available Menu items under **Team > Time > Timesheets > Change Requests**.

Time Off Roster: Added Visual Indicators for Approved and Pending TORs

WFR-199051: The cells in the **Time Off Roster** report will now display colors configured in the time off definitions. If a dynamic duration is specified and you have the **Time Off To Display** filter options enabled, a circle icon will display in the cell, such as a filled in circle to indicate a full day.

Timesheet

> **Important:** All timesheet users will be switched to the New Timesheet view in R75 (June 2021).

Column Widths Now Dynamic

💡 WFR-179052, WFR-226324: Previously, the Timesheet had fixed width columns, which would result in extra white space horizontally.

What's changed: The column widths are now dynamic, automatically adjusting to the size of the information it contains. The **From** and **To** columns under the **Time Entry** tab will remain static, while the rest of the columns will size dynamically so that the timesheet table fits in the entire screen.

Date on Calc Detail Tab is Now a Link

WFR-223645: As previously available in the Classic Timesheet, in the New Timesheet for desktop users, the date under the **Calc Detail** tab is now a link that will navigate you to the **Time Entry** tab when clicked.

Display Schedules in Date Column

💡 WFR-218083, WFR-218082: The **Schedules** column has been removed, and Schedules will now display in the **Dates** column underneath the date. The action column is next to the **Dates** column. The schedules that will display are the raw

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schedules, not calculated. If you select the schedule, the **Schedule/Shift Edit** pop-up will display.

Expand/Collapse Timesheet Days Options

💡 WFR-217292: Previously in the timesheet, users did not have the option to have all the days display as expanded rows by default, expand the current day only, or to expand only the rows that contain data, such as punches or bulk hour entries.

What's new: You can now customize your timesheet view with the data that you want to initially see. In the Timesheet Profile, a new drop-down, **Expand Timesheet Days**, has been added to the **Extra Settings** widget with the following options to choose from:

- Expand Current Day And Days With Data Only

- Expand Current Day Only

- Expand Days With Data Only

- Expand All Days

Fixed "Date" and "Action" Columns to the Left and Moved Daily Totals (Start/End)

WFR-218292, WFR-218073: In the New Timesheet, the **Date** and **Action** columns under the **Time Entry** tab are now fixed at the left of the timesheet and will remain fixed so that you can always see the data in these columns when you scroll. Previously, these columns disappeared when users scrolled to the right.

In addition, the Daily Totals were moved from above the days to below the days in order to improve the flow of time information.

Re-Calculate/Save New Timesheet through Manage Exceptions

WFR-218322: Previously, when users made a change to exceptions on the timesheet via the **Manage Exceptions** pop-up, the timesheet would not re-calculate unless the user saved the timesheet or took another action to re-calculate.

Going forward, when an exception is modified/deleted/or added via the **Manage Exceptions** pop-up, upon clicking **Ok**, the timesheet will automatically re-save (re-calculate).

Renamed My Clock to My Timesheet in Clock Widget

💡 WFR-212294: The Clock widget link to a user's timesheet that was previously labeled as **My Clock** has been renamed to **My Timesheet**. In addition, in the Security Profile under the **Dashboards** tab within the **Dashboard Widgets** widget, the **My Clock** option has been renamed to **My Timesheet**.

Separated Time Off and Cost Centers in Time Off Settings

WFR-160672, WFR-178548: Previously in the New Timesheet, users did not have the option from **Time Off Settings** to separate the Time Off and Cost Centers columns, which was previously available in the Classic Timesheet.

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What's been added: In the Timesheet Profile for the New Timesheet, an option from **Time Off Settings** is now available, **Separate Time Off and Cost Centers**, which will separate these columns if enabled or combine them under one column if disabled.

Updated Entering Military Time

WFR-201537: Previously, for companies with AM/PM enabled, when users entered a time without a colon, such as 207, the system incorrectly interpreted it as military time and for this example, changed the time to 8:07 instead of 2:07.

Going forward, the system will interpret times correctly when entered in the timesheet.

Updated View on Time Entry Tab

WFR-221408: The **Time Entry** tab view on the on the timesheet has been updated and sizing improvements made in order to fit more data, days, rows, and columns on the screen.

Timesheet Change Request

Added CC to Punch In Option

💡 WFR-191024: Previously, if an employee forgot to punch in and was working in a new location or department, the employee could not identify which cost center from **Add Punch In Change Request** they were working in, which resulted in having to perform a separate action of modifying the cost center.

What's changed: A Cost Center section has been added to **Change Request** for the type, **Add Punch In**. This allows employees the option to choose the cost center for where the punch in should go when submitting this type of change request.

Added Notification Tags for CC 6-9

WFR-192034: Previously, notification tags were only available in the **Generate Notification** step of the Timesheet Change Request workflow for cost centers 1-5.

What's been added: Notification tags for cost centers 6-9 are now available to add. This will allow users to include up to 9 cost centers in an employee's email notification.

Added Option for Delete Punch

WFR-211456: Previously, there was not a timesheet change request option for employees to request deleting a time entry or single punch.

What's been added: A new timesheet change request **Change Type** option has been added, **Delete Time Entry**. When selected, the employee will be able to choose one or multiple time entries to delete.

Added Require Comment

💡 WFR-191036: Previously, not all timesheet change request types had the option to require employees to add a comment when submitting a timesheet change request.

What's been added: In the Timesheet Profile, within the **Change Requests Employee Can Perform** section, **Require Comment** boxes have been added next to all change request types so that you can choose which timesheet change requests should require a comment from the employee upon submission.

Added Tag in Workflow Notification

WFR-192033: Previously in the **Timesheet Change Request** workflow **Generate Notification** and **Global Notification** steps, there were not any tags available to provide additional information.

What's been added: A new tag, **Request Info**, has been added, which will display the existing data and the new data.

All InTouch Clocks: Allow Timesheet Change for Previous Pay Period

WFR-37080: Previously, timesheet change requests on all InTouch devices were only available for the current period, which made it so that employees could not correct a missed punch from the previous pay period.

What's changed: Users can now submit a timesheet Change Request from an InTouch device to correct a punch from the previous pay period.

Bulk Time Input in Change Request

WFR-223615: You can now enter Bulk time as a number in minutes in the Change Request pop-up and this will properly convert into HH:MM or HH.DD.

Display Predefined Default Cost Center in Change Request

WFR-223604: Previously, for any of the Add options in the timesheet **Change Request** pop-up, the cost center field displayed as blank.

What's changed: The employee's default assigned cost center will now automatically display in the timesheet **Change Request** pop-up for the Add change requests.

Time Off

Modify Time Off: My To-Do Items

WFR-220918: Previously, Modify Time Off was not available for non-consolidated time offs for multiple day requests, and users could not modify a Time Off Request from a Time Off Request My To-Do Item.

What's been added: Modify Time Off is now available for non-consolidated multiple day requests, which include multiple days and dynamic duration. In addition, a new **Modify** button has been added to time off requests within the request's My To-Do Items.

Separate Time Offs and Cost Centers in Tree View

WFR-198967: Previously, when the **Separate Cost Centers and Time Offs** option was unchecked, time off categories did not reflect in the Tree View. Going forward, time offs will display in the tree view as expected.

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Time Off Utilization Settings Not Applied

WFR-173219: Previously, Time Off Utilization settings configured in the Time Off Request profile were ignored when a manager approved time off via the **Pending Approval** report. The time off utilization used the employee's PTO balance first before using the UTO balance.

This has been fixed, and going forward, when a manager approves time off through the **Pending Approval** report, the time off utilization will be applied, and the UTO balance will be used.

Workflows

Line Break Formatting in Workflow Question

WFR-208852: Previously for users who used one Question step with multiple questions and/or lists, the user's formatting was ignored, and all questions/lists were formatted in one sentence. Going forward, questions configured in workflows will display properly with the intended format.

Workflow Migration To-Dos

WFR-229964: Previously for some companies that migrated to the workflow approval process, administrators received many To-Do Items for all items that had been submitted.

What's been added: For users with **Company Payroll Functionality** enabled in their Security Profile from receivers of To-Do Items, a new checkbox in the **Approve/Reject** workflow steps has been added, **Exclude Payroll Admins**. If this checkbox is enabled, To-Do Items will not be generated for these users so that they do not receive an excessive number of To-Do Items, but users will still be able to process submitted items via reports.

Webclock

Mobile Quick Punch and Change Cost Center

WFR-213642: As previously available in the Classic Mobile App, Quick Punch and Change Cost Center options are now available for users to quickly clock in and out or change cost centers from the login screen in the New Mobile App.

To allow for quick punching in and out, navigate to **Mobile Quick Punch Preferences** (**Global Setup > Company Setup**) and enable the functionality with the **Enabled** checkbox. Within the **Quick Punch Settings** section, the following options are available to enable for punching in/out:

- Allow Simple Punch

- Allow Punch IN

- Allow Punch Out

You can also enable options to allow users to change cost centers. Make sure **Allow Mobile Login** is enabled and enable **Show Change Cost Centers** from the **Quick Punch Settings** section.

Updated Naming in Areas Used by Mobile Quick Punch

WFR-226118: Due to the Classic Mobile App being deprecated, in all areas where settings apply to Mobile Quick Punch, **Classic Mobile Preferences** (under **Company Settings > Global Setup > Company Setup**) has been renamed to **Mobile Quick Punch Preferences**.

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Scheduler Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed Scheduler release notes for April 2021.****

💡 We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

Employee Profile

Daily Rules Limit List

💡 WFR-197695, WFR-221386: Previously, users could create lists for daily schedules, but they were unable to assign a list to a manager so that the manager was able to see only the Daily Rules in their list when creating basic schedules.

What's been added: For TLM and TLM + Scheduler companies, a new widget, **Daily Rules**, has been added in the Employee Profile so that users can create and assign a limit list for managers. Basic Daily Rules will display in this widget. Managers that are assigned a Daily Rules List will be limited to select only Daily Rules that are part of that list (in any TLM page where a shift can be assigned).

Schedules

Added "Add New Shift" Button to Browse and Select Shifts Window

💡 WFR-213374: As previously available in the Classic UI, in the Day, Week, and Month views in the New UI, you now have the option to add a new shift by directly clicking on the employee row. When you left-click in the row, a **Browse and Select Shift** pop-up will display shifts that the employee would be qualified for. Once a shift is chosen, select **Add New Shift**. The **Manage Shift** window will display where you can choose the date, adjust the shift time, etc.

Added Swap Selected Shift Option to Schedule Screens

WFR-213372: As previously available in the Classic UI, in the Day, Week, and Month views in the New UI, you now have the option to swap selected shifts when two shifts are selected. When you select two shifts, the pop-up will display a **Swap Shifts** option.

Display Assigned Time Off Colors in Schedule Views

WFR-200768: Previously, all time offs in the schedule displayed as a green color.

What's changed: You can now assign colors to time offs, which will make the time offs easily recognizable in any of the schedule views and **Weekly Schedule**. Under **Company Settings > Global Setup > Time Offs**, choose a color for each time off from the **Time Off Color** field.

Scheduler Fairness Additional Conditions Updated

💡 WFR-202663: From **New Scheduling Fairness Rule**, if **Changing Start/End Time** is enabled and the **Compliance Payout** is a time-based counter, a new section, **Additional Conditions**, will display. From this section, you can enter a number of hours to add to the shift or remove from the shift. The formula is: **Value * Total Canceled Hours**.

Scheduler Fairness Trigger for Posted Schedule

WFR-219766: Previously, Schedule Fairness triggered for changes made to posted schedules, but it did not trigger the workflow for adding extra pay when posting a schedule that was in violation of the Scheduling Fairness rule.

What's changed: If there are any Scheduling Fairness rules where an employee has to approve a change when a shift is added to their schedule that includes extra pay, the system will look at the shift date on the schedule, and if pay needs to be added for the shift depending on the Fairness Request Conditions, the employee will see the to-do item, as well as the extra pay.

Schedule Week View PDF Print Version

WFR-181116: You can now download a PDF print version of the **View By Week** schedule. From this view, click the three-dot ellipsis button at the top of the schedule, and select **Download PDF**. This print view will display the shift color, schedule name and dates, shift skill, time, and scheduled cost center.

HR Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed HR release notes for April 2021.****

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New! UKG Ready Recruiting Workspace

Workspace Design in Job Requisitions

EPIC Tickets WFR-189220, WFR-189221, WFR-197745, WFR-197746, WFR-197747, WFR-197748, WFR-197749, WFR-197750

The workspace is a new optional design to provide flexibility for managers and recruiters to perform their day to day activities efficiently by ensuring they can stay focused inside the workspace rather than navigating to multiple menu items to perform various tasks in the process of identifying a suitable applicant.

- The new design will work on the desktop as well as a mobile device. The workspace is optional and is controlled by a security setting. You will navigate to the Job Requisition report page under **Team > Recruitment > Job Requisitions**. From there, you will select or create a job requisition and on that page you will see the option to switch to the new workspace once the security permission is set.

- You can enable users by security profile to have access to the new workspace. Once enabled, they will see a banner when opening or creating a Job Requisition in the Job Requisition menu under **Team > Recruitment > Job Requisitions**. The setting is on the HR tab of security profiles in the Recruitment section. In the **Job Requisitions** permission, check **View Workspaces**.

- After opening or creating a job requisition, the banner toggle will display. Users will click the **Try the New Workspace** banner to open the new workspace. To return to the old view, users will click the **Back to Standard View** banner. In the Standard View, you will navigate through the menu structure to access each area.

Account Contacts

Employee PDF – Hiding Non-Visible Account Contacts in Downloaded PDF

WFR-217673: In the February 2021 HR Release Notes, we added an Account Contacts widget in Company Settings where you can require, hide and display fields in the Account Contacts widget in employee profiles.

> **Note:** For more details, please download the February 2021 HR Release Notes and refer to the Account Contacts write up.

In this release we are hiding the contact type fields that are not marked to display in the Account Contacts widget in Company Settings.

> **Example:** After clicking the Download PDF button and selecting the Contacts widget in Print Settings, you can select or de-select Contact Types to be included in the PDF. Any contact types that are not enabled in Company Settings

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will not display as an option in the Print Settings page. Conversely, if a contact type is checked under any contact type or default, it will display as an option on the Print Settings page.

Company Settings

Restriction for Special Characters in Employee Profiles

WFR-223230: A new widget, **Restrict Special Characters**, has been added to the Company Settings (in Account Policies) where employers can turn the validation on and prohibit special characters for the following fields, listing which special characters are prohibited.

Custom Forms

New Security Permission to Hide Custom Forms in Available Tab

WFR-198309: A new security setting has been added that can hide custom forms on the Available tab unless the custom form has been assigned to the user. This solves the problem of sensitive custom forms being visible to all users who have access to custom forms.

The **Hide From Available Tab Unless Assigned** setting has been added to the **My Custom Form Items** widget under the **ESS** tab of security profiles. For it to be active, the form item must be enabled with the View setting as a minimum.

When the hide setting is checked, only users assigned to that custom form will see it on the Available tab of custom forms under **Team > HR > Forms > Other Forms**. These users will also see it on the **Open** tab since they have been assigned to the form and once submitted on the and **Submitted** tab. Once the form is submitted, it again is not visible on the **Available** tab with this setting enabled.

- The hide option is available for View, Edit, and Delete only.

- Is a user has Add permission, the hide option is not activated since the Available tab is required in order to add a form.

EasyBackgrounds

Password Fields in Desktop Experience vs Mobile Experience

WFR-202211: In the desktop experience (.hcm), the easyBackgrounds credentials password is displayed as ********* when the user opens the credentials page under **My Info > My Information > My Profile > easyBackgrounds Credentials**.

However in the mobile experience (.home) under **My Info > My Information > easyBackgrounds Credentials**, the password field will always be blank (which is similar to other pages in .home) and the eye icon (Show) is displayed to view the input password before saving.

Employee Profiles

Employee Sync Profile: Link Provided in Error Page

WFR-214501: When synching an employee profile and an error is received, a link to the page in question will be provided in the error pop-up. Clicking the link will take you to that page so you can correct the error. For example, if the profile cannot be synced because it is not compatible with the earning selected, the link would redirect you to that earnings page.

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HR Actions

Effective Date Badge (InTouch) Fields Added to HR Actions

WFR-188897: Effective Date Badge fields (for Intouch) are now available in HR Actions.

Primary Phone Default Setting Added to Hire HR Actions

WFR-218329: In the February 2021 system release, we added an option in Company Settings where you can designate the default primary phone to be either the Work, Home or Cell Phone upon hiring through the manual hire process or via imports. We also added the ability for employees to designate a default phone number via a My Information HR Action.

> **Note:** For more details, you can reference the February HR Release notes and search for the title of Company Settings and under that title these three tickets explain the functionality: WFR-207775, WFR-16682, and WFR-207766.

In this release, we are extending the hire functionality via an HR Action. This will be done in the My Employee Action Request with sub type Hire. Within that HR Action, you can now add the Primary Phone action item. Whichever phone is selected as default in Company Settings when hiring an employee or applicant through the HR Action, the system will use that default unless the user overwrites it in the Primary Phone drop-down in the Hire HR Action.

Additionally, the Info icon verbiage in the Primary Phone field, located in the Other Defaults widget of Company Setup on the Defaults tab, has been edited to reflect the release of this functionality.

TLM HR Actions with New Single Select Lookup

WFR-208848, WFR-208846, WFR-208844, WFR-208843: A new single select lookup is available in the Pay Calculations field within HR Actions. In addition, the new single select lookup is available in the Browse and Select TS Auto Population Profile, Time Off Planning Profile, and Holiday Table pop-ups within HR Actions.

Imports

Employees Import: Emergency Contact Required/Not Required Based on Account Contacts Widget

WFR-217646: In the February 2021 release, we introduced a new Account Contacts widget in Company Setup. In this widget you can customize how employee account contacts are to be added and whether they should be required or not required. For more details, please download the February 2021 HR Release Notes and search for the Account Contacts title (page 6 of document). In this release, we are upgrading the Employees import template to accommodate the Emergency Contacts for this new functionality.

The template contains a section titled **Emergency Contact Fields** of which, Emergency Contact Relationship has historically been marked as required. However, with the introduction of this new widget, the required field will now be based on the configurations in the new widget.

Lookup List Updates

Benefit Plans Details Page Updated with Employee Lookup

WFR-218667: The Benefit Plans Details page in the mobile experience has been updated with an Employee lookup. Formerly, this page contained an employee selection drop-down. The new lookup will open the standard application Browse and Select Employee report pop-up, which gives you greater control over the employee selection list. This page is accessed under **Team > Benefits > Benefit Plan Details**.

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Company Asset Lookup Replaced with Report Based Lookup

WFR-211650: When assigning assets to employees under **Team > HR > HR Maintenance > Assets Assignments**, the **Company Asset** field lookup has been replaced with a report page style lookup to give greater control over the asset list. Formerly, this field contained a drop-down style lookup. This lookup will also be available if assigning assets via an HR Action.

Vehicles Lookup Replaced with Report Based Lookup

WFR-211650: When assigning vehicles to employees from the **Vehicles** widget of their employee profile accounts, the **Company Vehicle** field lookup has been replaced with a report page style lookup to give greater control over the vehicle list. Formerly, this field contained a drop-down style lookup.

HR Action Items Lookups Replaced

WFR-208771: The lookup for HR Action items **Default Workers Comp Code**, **Labor Distribution Profile** and **Pay Period Profile** have been updated to a single select style. Users/managers can open their HR Action and from the lookup for these items, select a single item for that action item.

WFR-226019: The **Vendor** lookup when editing a deduction in the Deductions widget of an HR Action, has been updated to a single lookup.

Peer Feedback

New Notification When Provider Gives Feedback

WFR-218140: A new **Peer Feedback Provider Added Comment** notification has been added to the notifications maintenance area, located under **Company Settings > Global Setup > Notifications**, in the **Peer Feedback** category. This notification will trigger each time a provider gives feedback and can be sent as a message to the manager of the employee and/or the manager of the provider. The notification will also work with the SMS Twilio Marketplace product (if enabled) and an SMS message can be added to the notification.

Recruitment - General

Applicant Created Dates & Applicant Hired Dates in Multi EIN Companies

WFR-222642: Previously, the system was updating the created dates of the applicant record when an applicant was hired in a multi EIN environment. The applicant created date was not retained, and users could not run a report to show the time an applicant was in the system before being hired. To address this issue, the following changes have been applied.

- Created date on the Applicant report reflects the original date the applicant record was created and will not update to the date the applicant was hired into the system.

- Created date on the Employee report reflects the date when the employee record was created, i.e. the date the applicant was hired in the system.

- Added the "Applicant Created" column in the Time to Hire report.

- Renamed "Created" column to "Employee Created" on the Time to Hire report.

- This is not retroactive and is only valid going forward.

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Icon Changes in Recruitment Pages

WFR-216231: Some updates have been made to the icons in several places in Recruitment. These changes primarily affect the View or Edit functions. The updates are as follows:

- Job Requisition Report Page: View Job Requisition - Pencil icon

- Job Application Report Page: View Job Application - Pencil icon

- Job Application Report Page: View Job Requisition - Briefcase on page icon

- Job Application Report Page: View Questionnaire - Question mark on paper icon

- Questionnaire Answers Report Page: View Applicant - Employee Profile icon

- Questionnaire Answers Report Page: View Job Application - Person on page icon

Job Requisitions: Recruitment Filters Added for Job Applications

WFR-201558, WFR-201559, WFR-201550: Multiple filters have been added to the Global filters when navigating to the Job Applications page within the Job Requisition report page.

> **Note:** These options are available in both Standard View and the New Workspace. The navigation path listed below is how to access these filters in Standard View. The options in the New Workspace will be available from the Applications tab in the Quick Filters panel.

- Hiring Stages - These filters provide options of selecting and filtering job applications with or without hiring stages.

- Applicant Type – These filters provide options of selecting and filtering job applications by applicant type External, Internal, and Returning Employee.

- Job Application Status – These filters provide options of selecting and filtering job application by All Applications or New Applications.

Navigate to:

1. **Team > Recruitment > Job Requisitions**

2. Click the **View Job Requisition** icon to navigate to the Job Requisition details page.

3. Access the applications via the **Applications** jump link.

4. From the Applications widget, click **View Report** option from the ellipsis.

5. Click the funnel-shaped **Filters** icon. The filters will display on the **Global** tab.

Job Requisitions: New Dashboard Widget - My Open Job Requisitions

WFR-217227: A new **My Open Job Requisitions** widget is available to be added to your dashboards. The widget will show all open job requisitions. When selecting one of the requisitions from the widget, the requisition will open for viewing and/or editing. On this page, if the new Job Requisition Workspace has been enabled, users can select the banner to open the new workspace and work with that open requisition and related applications there (see details about the new

workspace in this document.) Selecting the back button will return the user to their dashboard. Selecting the hyperlinked title of the widget will open the Job Requisition report page and will show only your open requisitions.

- Users must have security enabled for the Job Requisitions permission, with View as the minimum setting. This is set in the Recruitment section of the HR tab in security profiles.

- Users must also have security enabled for dashboards. In the Dashboard Widgets section, located under the Dashboards tab of security profiles, ensure the users have permission to this widget. Select either All or Custom. If selecting Custom, select the Permissions button and select the dashboard widgets the users can see and use.

Workflows

Collect Note Options Added to Approve/Reject Step of Custom Form Workflows

WFR-212197: Historically, the Collect Note step in a Custom Form workflow is used so managers can add a note during the workflow process. This step in a workflow results in another To Do Item for the manager. In this release, we are adding configuration options to combine the approve or reject process with the collect note process.

In the **Accept/Reject** step of Custom Form workflows, a configuration option to collect a note has been added, along with an option to make it required. With these options, when a manager does the approval or rejection, they can add the note in that same step without receiving a separate Collect Note To Do Item.

Payroll Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed Payroll release notes for April 2021.****

💡 We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

Important! Quick Payroll Under Construction

WFR-219834: In the February 2021 release notes, we notified you that we are making some required UI changes to Quick Payroll, and that the functionality would not be available when the April 2021 release is applied to your server. As of this release (April 2021), Quick Payroll will be unavailable, and its unavailability will likely extend into future releases. When it is ready, we will notify you in the release notes.

1099-NEC data can now be reported in Electronic Forms

WFR-223244: On the **EF W2/1099 Files** page, when users click the **Create EF W2/1099 Files** button to create a form 1099 for the following states, the system creates one Electronic File with the B record for 1099-MISC and 1099-NEC forms:

- Oregon

- Vermont

Pennsylvania is slightly different from Oregon and Vermont. When users click the **Create EF W2/1099** Files button to create a form 1099 for Pennsylvania, the system creates separate Electronic Files: one containing 1099-MISC forms, and one containing 1099-NEC forms.

For all three states, users must enable the state-specific EF formats at **Company Settings > Global Setup > Company Setup** on the **Payroll Tab** in the Printed W2/1099 Options widget and the **1099** section.

CARES Act retention credits are extended into 2021

WFR-216585: The system is updated to calculate the CARES Act retention credit into 2021. The calculation is based on the earnings and deductions in a pay statement.

FFCRA earnings types are extended into 2021

WFR-216570: The system is updated to extend into 2021 the Earning Limit for the three FFCRA earnings types, which are as follows:

- FFCRA Family 10 day with 2000 limit

- FFCRA Sick 10 day with 5110 limit

- FFCRA Family Leave 10 week with 10000 limit

MasterTax Specification Updates are Applied

WFR-230144, WFR-231612: MasterTax RTS and PTS files are now updated to match the MasterTax specifications for the first quarter of 2021.

State Forms are Updated for 2021

WFR-204763: The following updated state-specific forms for 2021 are now available in the system:

- Connecticut: W-4

- Maryland: MW507

- Minnesota: W-4

- New Jersey: W-4

- North Carolina: NC-4, NC-4EZ

Cross Product Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed Cross Product release notes for April 2021.****

💡 We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

> 🇺🇸 **Only for United States:** The Payroll note below is applicable for U.S. users only.

IMPORTANT! Quick Payroll Under Construction

WFR-219834: In the February 2021 release notes, we notified you that we are in the process of making some needed and required UI changes to Quick Payroll, and the functionality would not be available once the April 2021 release is applied to your server. As of this release (April 2021), this feature will be unavailable and this will likely extend into future releases. When it is ready, we will notify you in the release notes.

Access Control

Timesync as an Immediate Command

WFR-205429: Users can now trigger the Timesync as a manual command, allowing them to correct any issues with either DST or time desync.

> 👥 **Only for UKG Ready™ Customers:** The **Advanced People Analytics - Full** items below are currently available for UKG Ready™ Customers only.

Advanced People Analytics

Internal Benchmarks by Cost Center Report: Show Employees Using Prompt

WFR-216564: Users can now choose the data type to be used for Employee information on the Insight Explorer so that the displayed data is informative to them. On the Internal Benchmarks by Cost Center report, there is a new prompt/drop-down for **Show Employees using**. This new prompt is available for Questions 0, 1, 4, and 5. A new column, **Full Name**, is available for inclusion in this and all Analytics reports.

Question 0 in Guided Analysis for the Internal Benchmarks by Cost Center Report

WFR-206062: The Question 0 question, **What is the state of my organization for benchmark metrics?**, is available on the Guided Analysis panel of the Internal Benchmarks by Cost Center report. The AIMEE view is generated after clicking on the **ASSIST ME** button.

Employee Using Prompt for Guided Analysis Questions in Internal Benchmarks By Managers

WFR-216582: Users with access to the Internal Benchmarks By Managers report can now choose the data type to be used for Employee information on the Insights Explorer so that the displayed data is informative for them. There is a new drop-down, **Show Employees using**..., with options for Employee Id (default), User Name, and Full Name.

Exclude Employees from the Internal Benchmarks Model

WFR-183148: Admins can now exclude Employees/Groups from an Internal Benchmarks Model run as they may not be relevant for tracking. Within the AIMEE Definitions screen, when an Admin clicks on the people icon, an Employee Lookup section labeled **Employees To Exclude From Model** can be used to define which employees to exclude.

Exclude Group of Employees from Reports

WFR-219532: Users can utilize the **Employees To Exclude From Model** option in the AIMEE Definitions settings to exclude groups of employees from the model run. The excluded employees also do not display on the Internal Benchmarks reports (**By Managers** or **By Cost Centers**).

Filter Option on Saved Charts for Dates

WFR-218926: Users can now see the date filter on the Saved Charts in the Insights Explorer in the Analytics reports so that they know what date filter has been applied.

Manage Existing Charts Panel in Insights Explorer

WFR-212069: Users can now see the updated Manage Existing Charts panel (previously **Add Existing Chart**), which resembles the current Charts panel and contains a re-arrange function (Up and Down arrows). The new panel view is in table mode with a checkbox to select each chart, the Chart Name, and the Display toggles. Upon clicking on the Chart Name, the **Edit Chart Settings** panel is opened.

WFR-170850: Re-arrange arrays (Up and Down arrows) are available on the Manage Existing Charts panel. When a user selects the checkbox for a chart, the Up and Down arrows become active. A new chart order is saved and applied after saving the Manage Existing Charts panel. When a user selects the first or the last chart in the list, the Up or Down arrow is disabled.

Print the Insights Explorer Screen

WFR-153686: Users can now print the Insights Explorer screen so they have the same behavior as standard charts. When the user is on the Insights Explorer screen, the system displays a **Print** option in the top ellipses which allows the user to print the Insights Explorer screen. The system prints the charts or grids depending upon what is on the screen.

Insights Explorer Manage Existing Charts Panel Bottom Section Anchored

WFR-214967: The bottom section of the Manage Existing Charts panel, with the **Delete** and **Re-Arrange** action icons, is now anchored above the Save/Cancel buttons so that users can see the buttons without scrolling down.

Reset Function for the Insights Explorer Page

WFR-162194: The **Reset** option, which is under the top ellipses of the Insights Explorer page, is now disabled until changes are performed in the Pivot table.

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Multi-Chart Print on the Insights Explorer Page

WFR-213909: A multi-chart Print function is now available so that users can print all of the saved charts on an Insights Explorer page. There is a new Print icon in the header of the Analytics reports. Charts with any errors are not printed.

Stack Charts Option for Pivot Tables

WFR-191753: Users now have the option to stack bar and column charts created through Pivot functionality to better arrange their data. A new checkbox, **Show as a stacked chart**, is displayed on the Edit Charts Settings panel in the Insights Explorer within the Analytics reports. It is only available for column and bar charts provided that both Metrics and Dimensions are defined. In other cases, the **Show as a stacked chart** checkbox is not shown.

Hidden Actions for Pivot Tables in Chart View

WFR-162196: Three options (**Format Cells**, **Conditional Formatting**, and **Layout Options**) under the ellipses are now hidden for Pivot Tables when data is viewed as a chart.

Disabled Navigation from Dashboard to Explorer Page on Mobile

WFR-179250: Users cannot navigate from the Dashboard (Pivot Chart) to the Explorer page using the Mobile Application.

Custom Format Cells in Insights Explorer

WFR-174295: Users now see a Custom Format Cells dialog in Insights Explorer on Analytics Reports. There is a custom Format Cells dialog in the Pivot Table when opening the Format Cells dialogue.

No warning message (**You have some unsaved changes**...) displays if the user makes some format changes for one value without applying them, and then switches to another value. All changes for the first value are reset.

When a user changes any option in any drop-down and then selects a new column in the **Choose Value** drop-down, the system puts all of the changed options back according to the selected column.

Validation on 24-Hour Window Between Enabling of Analytics and Import

WFR-226084: If a user tries to import fake data for a company (from **Maintenance > Imports > Advanced People Analytics > Analytics Demo Data** in an **Admin** company) for which the Advanced People Analytics: Full functionality has been enabled for less than 24 hours, users need to be made aware that the import is not possible so the import can be attempted at a later time. If validation fails, an error message displays explaining that the **Import has failed because analytics was enabled for company less than 24 hours ago. Please try import again tomorrow**.

View Report Data and Back Buttons on the Reports

WFR-176748: When a user navigates from a Dashboard (Pivot Chart) to the Insights Explorer page, a **View Report Data** option/button is available for selection and navigates the user to the appropriate report. This option is available with the same logic on all Insights Explorer pages.

After completing a **Save As** on an Insights Explorer page, the newly created report view is opened after clicking the **View Report Data** button. The **View Report Data** button is displayed for Guided Analysis pages and on the Insights Explorer after navigating from the Dashboard.

> **Only for United States:** The **Affordable Care Act** features below are applicable for U.S. users only.

Affordable Care Act (ACA)

2020 Changes to DC ACA Reporting

WFR-221644: The system now has the updated version of the file specifications for the healthcare reporting files required by the District of Columbia, which allows users to submit their file electronically with no errors.

California ACA Reporting

WFR-207120: California has introduced their own type of healthcare reporting that is due for the first time for the tax year 2020. The file format is similar to the Federal XML file, and like the Federal filing, test filings must be done first. All three options to **Generate CA ACA**, **Generate CA Test File1** and **Generate CA Test File2** are showing properly under the ellipses of the last step of the Generate AIR Files process.

WFR-207284: The system provides the first test file required for CA healthcare reporting to be sent directly and perform the first required test. The filing requires two test files (whereas the Federal filing only requires one test), so these test files have been introduced in the system.

The first test file is similar to the IRS AIR TCC Communication Test file, only it is updated with all of the CA specific field labels. As with the IRS' test file, this is filled with dummy data and is validated character by character. When a user selects the **Generate CA Test File 1** option under the final step of the Generate AIR Files process found within the ACA Year End Processing Checklist, s/he is presented with a pop-up similar to a combination of the pop-up presented when a user selects the **Generate DC ACA** option and when they click on the TCC and Software ID button. California issues employers their own separate TCC (Transmitter Control Code) and there are actually separate TCC's issued to the employer for testing and production. The **Transmitter Control Code (TCC)** field allows a maximum of five characters and only allows letters and numbers (no special characters).

WFR-230462: As mentioned in the validations for the test files, in the California ACA file, the Transmitter Control Code (TCC) accepts only 5 digits with the pattern [0-9A-Fa-f].

WFR-207286: The second test file is also similar to the IRS AIR TCC Communication Test file, only it is updated with all CA specific field labels and it is for corrected forms. As with the IRS' test file, this is filled with dummy data and is validated character by character. When a user selects the **Generate CA Test File 2** option under the final step of the Generate AIR Files process found within the ACA Year End Processing Checklist, a pop-up displays. A blue information bar reads **Enter the California Testing TCC, The Receipt ID from your first CA ACA Test File, and press "OK"**.

When the user selects the **Generate CA Test File 2** option under the final step of the Generate AIR Files process within the ACA Year End Processing Checklist, if the user has entered a valid Transmitter Control Code (TCC) and a valid CA Receipt ID, the file is generated successfully.

WFR-207270: The California filing itself consists of a Manifest and Form Data File, the same as the Federal AIR filing. The system guides users when creating a live production file so they can be sure that their file is being created accurately, allowing them to file without incident.

When a user selects the **Generate CA ACA** option under the final step of the Generate AIR Files process found within the ACA Year End Processing Checklist, s/he is presented with a pop-up similar to a combination of the pop-up presented when a user selects the **Generate DC ACA** option and when the user clicks on the TCC and Software ID button. California

issues employers their own separate TCC (Transmitter Control Code), and there are separate TCC's issued to the employer for testing and production.

California Form Data File

WFR-207118: California has introduced their own type of healthcare reporting that is first due for the tax year 2020. The file format is similar to the Federal XML file, but there are some differences between the AIR Form Data File and the California Form Data File.

California Manifest File

WFR-207121: California has introduced their own type of healthcare reporting that is first due for the tax year 2020. The file format is similar to the Federal XML file, but there are some differences between the AIR Manifest File and the California Manifest File. The CA version requires a lot less information.

Announcements

Linkable Entries in Visible To Columns

WFR-211558: The data that populates the **Visible To Group** and **Visible To Security Profile** columns in the **Announcements (Maintenance)** report page will now by hyperlinked. This can also be accessed via the **Announcements** button in Dashboard Layout Profiles.

- In the **Visible To Group** column, clicking the entries will take you to the **Edit Dashboard Layout Profile** maintenance page.

- In the **Visible To Security Profiles** column, clicking the entries will take you to the **Edit Security Profile** maintenance page.

> **Note:** This is not yet supported in the Mobile App.

Charts

Charts Page: Display Actions on the Section not in Ellipsis

WFR-215583: When users access a report page with the Charts View toggle enabled, they now have options just in the section and no longer in the Ellipsis menu so they can use them in one click. There is no ellipsis, and there are separate **Print** (icon) and **Manage Existing Charts** buttons in the section.

Company Settings

Restrict Special Characters in Certain Fields

WFR-223230: A new widget, **Restrict Special Characters**, has been added to the Company Settings (**Company Settings > Global Setup > Company Setup**, in **Account Policies**). Employers can enable this validation via a checkbox to prohibit special characters for the following fields, listing which special characters are prohibited:

- **Name:** This includes all Name fields such as First Name, Middle Name, Last Name, Nickname, and Suffix.

- **Phone:** This includes all phone fields such as Cell Phone, Home Phone, and Work Phone.

- **Username**

An informational message explains that the special characters should be entered without any spacing or delimiter such as a comma.

Only Special Characters are allowed in all fields under the **Restrict Special Characters** settings section. If a letter or number is entered, an error message displays explaining that it must be a special character. The maximum length of each field in the **Restrict Special Characters** section is 35 characters.

> **Tip:** If a special character is included in the **Generate Username Format**, it should not be entered as a prohibited special character for the Username in the **Restrict Special Characters**. A warning message will display explaining that there are **Conflicting values under Generate Username Format & Username section under RESTRICT SPECIAL CHARACTERS**.

WFR-210494: If **Restrict Special Characters** is enabled in **Account Policies** and prohibited special character(s) is/are entered on the Employee Record (ESS and MSS), an error message displays indicating the special characters are invalid and prohibited.

WFR-215678: Users will receive an error message indicating the special characters are prohibited if they enter special characters via the Employee Import that are listed in the **Restrict Special Characters** section for the field(s).

> **Note:** In an Employee Import, an Error displays if there is a prohibited special character in a Required field such as Username, First Name, or Last Name, and the system will not allow the record to be imported at all. A Warning will display for prohibited special characters in a field that is not required such as Work Phone, Home Phone, Cell Phone, Middle Name, Nickname, and Suffix. The system allows the record to be imported, however fields with prohibited special characters are skipped. If there are existing validations for any of the fields, the existing validations display first and then the new special character validations display next.

WFR-215679: When users enter special characters via HR Actions, and those special characters are listed in the **Restrict Special Characters** section for the field(s), they will receive an error message when clicking **Save** or **Submit** indicating the special characters are prohibited.

Cost Centers

Cost Center Lookup Redesign

WFR-190600, WFR-193188, WFR-209711, WFR-209710, WFR-209949, WFR-209945: All cost center lookups have been updated. When you click into any single select cost center look up fields, the **Browse and Select Cost Centers** pop-up will display with the standard report filtering and the full path of the cost centers. Under the **List View** tab, if more filtering is needed such as for external IDs, payroll codes, etc., you can bring in additional cost center columns, and you can save your view.

> **Tip:** If you save a view in the default cost center widget, that view will display across the application with the exception of the **Managed Scheduled Cost Centers**, **Scheduled Cost Centers**, and **Managed Cost Centers** widgets, which give you the option to save cost center views specific to those widgets.

The cost centers are single select, and when you make a selection, the pop-up will close.

> **Note:** Multi-selecting cost centers is available for the **Managed Scheduled Cost Centers**, **Scheduled Cost Centers**, and **Managed Cost Centers** widgets.

If you prefer the Tree View, you can select a cost center from the **Tree View** tab. Select the arrow next to the cost center and any child cost centers associated with the parent will display.

> **Tip:** The **Tree View** tab will not be available if there are more than 750 cost centers in any node.

Dashboards

Dashboard Updates: General

The following updates have been made to dashboards.

Ticket Number	Update/Issue
WFR-220532	Under Company Settings > Profiles/Policies (or **Maintenance > Companies > Client Resources > Global** from an Admin company), menu items for Content Widget Library and Dashboard Layout Profiles are now nested under the Dashboard Layout main menu item in the hamburger menu.

On Entry Show Specified Tab Upon Login on the Dashboard

WFR-197425: Admins need to define and schedule which tab should be viewed when users log in and access the Dashboard. This allows administrators to control the focal point of the end user Dashboard experience at difference stages. The **On Entry Show** option is available to Admins and located within the gear icon on the Dashboard Configuration page.

By default, the **Last Visited** tab is selected. If settings are changed in an active Schedule, changes are applied after the Schedule is **Reset** in either the Dashboard Layout Profile or Security Profile. Settings are applied immediately if a new Schedule Date becomes active or a new Layout Profile is assigned, and when a user logs in to the application or clicks the **Home** button.

> **Note:** The **On Entry Show** is not available on the Landing page for end users under the gear icon.

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Domain Dashboards Renamed

WFR-210550: When searching for "Dashboard" in the main menu, all Domain Dashboards appeared in the search with the same name, which looked confusing. Now the Domain Dashboards have been renamed and appear in the menu as follows:

- HR Dashboard

- Talent Dashboard

- Succession Planning Dashboard

- Learning Dashboard

- Compensation Dashboard

- My Team Dashboard

- Recruitment Dashboard

- Payroll Dashboard

- Time Dashboard

- Accruals Dashboard

- Leave Dashboard

- Schedule Dashboard

- Benefits Dashboard

- Analytics Dashboard

Company Default Column in Manage Views Popup

WFR-210383: Users who can manage views on Custom tabs of the Dashboard (**User Can Modify** checkbox is enabled for current schedule) can now see which Dashboard View is selected as the default for themselves and for their company so they don't have to check it manually in every view. By clicking **Manage Views** in the ellipsis menu of the Dashboard tab, the Manage Views pop-up opens. The **Default** column has been renamed **My Default**, and a **Company Default** column has been added next to the **My Default** column. The **Company Default** column shows which View is set as the default for all users in the company. The letter "**Y**" is present in the row for the view which is selected as the default for all.

Security Item Logic for Company Types Dashboard Views

WFR-213514: Users can share saved Dashboard Views with other users without dependency on the reporting framework. In the security profile on the Dashboards tab, any dependency of the **Share With All** radio button in the **Save View As/Save View** pop-up from the **Report Settings** checkbox on the Global tab has been removed. The **Manage Company Type Views** has been added to the **Sharing** section of the Dashboards tab.

Security Item Logic for Dashboards Shared Views

WFR-211354: Users can share saved Dashboard Views with other users without dependency on the reporting framework. In the security profile on the Dashboards tab, any dependency of the **Share** option in **Save View As/Save View** pop-up from the **Report Sharing User Selection** checkbox on the **Reports** tab.

The **Dashboard Sharing User Selection** security item in the client-level security profile (Dashboards security items) has been renamed **Dashboard Sharing**. The **Dashboard Sharing User Selection** item has been added below the **Dashboard Sharing** option in the **Sharing** section. By enabling this checkbox, users can share saved views with others.

Migration of Security Items for Dashboard Shared Views

WFR-214444: Users can preserve all previously existing functionality connected with sharing Dashboard views options so they won't be affected after reducing dependencies from report settings security items. Security Items that were created to control sharing Dashboard views options are checked or unchecked in security profiles depending on the state of the related security items that initially controlled the functionality.

New! Company Hub Dashboard Layout Configuration

A new Company Hub Tips/Tricks User Guide with additional information on this new functionality is coming soon and should be available within the next 1-2 weeks.

A new Dashboard Layout Configuration setting, **Company Hub**, gives your company a way to communicate and provide vital resources to your people. This option has been designed to deliver branded content to build unique company experiences. A single adaptable display pulls all your key organization-level information into one place for your employees. News feeds, embedded videos, and helpful links can communicate company standards, culture, and announcements.

Quick-start templates and formats make it easy to create views that match your organization's needs. This new experience provides specific widgets alongside customized Content widgets, allowing for up to 20 widgets per tab. With the Content widgets, this provides an Intranet within the Dashboard that is a read-only experience for end users.

WFR-188771, WFR-206282, WFR-206279, WFR-209638, WFR-211335: The new setting/option, **Show Company Hub**, is now available in the **Dashboards Visibility** section of the Dashboard Layout Profiles. When this option is enabled and a user selects **Edit** for one of the Schedules, grid lines outline different sections to be included in the layout when **Edit Mode** is on. The following sections can be added to the layout:

- Top Section

- Left Section

- Middle Section

- Right Section

By enabling **Edit Mode**, the layout includes the ability to add/configure the new sections on each individual tab so they will appear on the Dashboard as desired.

Company Hub Tabs on the Dashboard Configuration Page

WFR-209692: Admins can add Company Hub tabs to the Dashboard Layout Configuration so they can create specific content for end users. By clicking the gear icon in the header of a Dashboard, the **Edit Tabs** option appears in the drop-

down and when selected, opens the **Edit Dashboard Tabs** dialog page with options for:

- **Company Hub Tabs**: The functionality below is available for the Company Hub Tabs:

- **+ Add**: To add a new Company Hub tab

- **Select Row(s)**: To select existing tabs

- **Tab Name**: Tab Names can be edited here

- **Delete**: Once at least one existing tab is selected, the trash can icon is available to delete a tab or tabs.

- **Display Toggle**: Enabling this tab displays the new Company Hub Tab on the Dashboard Layout.

- **Up and Down Arrows**: Use these to re-arrange the tabs

- **Custom Tabs**: The same options are available for the Custom Tabs.

New Widget Notification With New Grid

WFR-212356: The new widget notification provides users with dialogue when new widgets are available, and it allows the user to add widgets directly to tabs. When multiple sections are present in the new grid, if a user chooses to add a widget via the new widget notification dialogue, the content is placed in the middle section of the new grid Dashboard Layout.

Move To Functionality for New Grid

WFR-206387: Users can move existing tiles to a different section so they can organize all information in a specific order. When a tile has been added to a section within a Dashboard Layout Profile (**Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles**, select **View/Edit Dashboard Layout Profile**, Edit the appropriate **Schedule**), a tile with an ellipsis menu is presented on the Dashboard. Clicking the ellipsis menu exposes a drop-down list with a **Move To** option.

Copy Tabs From Classic With New Grid

WFR-212355: Within **Edit Tabs**, users can copy tabs from the Classic UI. With the new grid/Company Hub, the following options are available to users when multiple sections are present in the new grid:

- By clicking **Edit Tabs** in the header of Dashboard, an **Edit Dashboard Tabs** pop-up appears on the page. At the top of the pop-up on the Custom Tabs screen, a message explains that **Content is available from your Classic UI. Copy tabs from Classic UI**.

- By clicking the **Copy tabs from Classic UI** link in the message, a **Copy Tabs from Classic UI** pop-up with a list of available tabs and items appears. When a user chooses to copy tabs from Classic, all content is placed in the middle section of the new grid Dashboard Layout.

Add Items to Sections of Company Hub Tabs

WFR-211327: Users can add different items to every section in the Company Hub tabs (Dashboard Layout Profile under **Company Settings > Profiles/Policies > Dashboard Layout> Dashboard Layout Profiles**, select **View/Edit Dashboard Layout Profile**, Edit the appropriate **Schedule**) so that they can organize information in a proper way.

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By clicking **Add** in every section, a drop-down list with the following options is available:

- Widgets

- Content Widgets

- Create Content Widget

Users cannot add or create Reports, Charts, or Pivot Charts. Only non-ESS and non-MSS widgets are available for adding to a tab, such as:

- **Announcements**

- **Documents**

- **Events**

- **Links**

- **Content Widget***(via the separate option in the Add drop-down list)*

- **Start**

- **Turtles**

- **Websites**

Middle Section Configuration in New Grid

WFR-207970: Users can place more tiles in the middle section of the new grid so the main Widgets/Charts are in one space. When the Dashboard grid (Dashboard Layout Profile under **Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Layout Profiles**, select **View/Edit Dashboard Layout Profile**, Edit the appropriate **Schedule**) is presented and the Edit mode is enabled, the Middle section is displayed by default

WFR-218776: Users can view up to three columns in the middle section so that previous versions of the Dashboard Layout are not affected after changes are applied with the new grid. Every column is added dynamically depending on the section width, and the columns appear adaptively depending on the width of the Middle section. The Resize tiles functionality is supported for 1 to 3 columns.

WFR-217622: Users can change the view of the tiles in middle section so they can restructure the tiles. When the Dashboard grid with a middle section is presented on the page with the **Edit Mode** enabled, options for List View and Matrix View are available at the top of the middle section.

- By selecting the List View option, all tiles are placed one under another as a list.

- By selecting the Matrix View option, all tiles are placed next to each other as a matrix.

New Grid Type for End Users

WFR-205226: Users can now conduct changes on their Dashboards so that they can organize it in a more convenient way. When navigating via the Home button in the main hamburger menu, users see the Dashboard, where these changes

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have been made:

- The **Edit Tabs** text next to the Gear icon in the header of the Dashboard and on the Configuration page has been removed.

- An **Edit Mode** toggle is available to control the Edit Mode on the page.

- The Ellipsis Menu and Full screen buttons have been removed completely from both the Admin and end-user Dashboard.

- By clicking on the Gear icon, a drop-down list with the following options appears on the Configuration page:

  - **Edit Tabs**

  - **On Entry Show**

- By clicking the Gear icon, a drop-down list with the following options appears for Custom Dashboards on the Landing page:

  - **Edit Tabs**

  - **Enable Edit Mode/Disable Edit Mode**

  - **Reset Configuration**

  - **Refresh**

  - **Print**

- By clicking the Gear icon, a drop-down list with the following options appears for Domain Dashboards on the Landing page (and for Domain Dashboards from the main menu):

  - **Edit Tabs**

  - **Enable Edit Mode/Disable Edit Mode**

  - **Refresh**

  - **Print**

  - **Save View...**

  - **Save View As...**

  - **Manage Views...**

Full Screen Mode for Report/Chart Tiles in Sections of the Company Hub/New Grid

WFR-224173: If the Company Hub/new grid is being used, Report and Chart tiles in full screen mode are handled as follows:

- A Report/Chart tile with the Full Screen option is presented in every section of a Dashboard tab.

- By clicking the Full Screen button for the tile, the Report/Chart is expanded on the page.

- The Report/Chart tile covers other sections of the Dashboard.

- To exit the Full Screen mode, users can press the ESC button or click on the Full Screen control for the tile.

Gear Icon Options on Dashboard in Company Hub

WFR-220426: The gear icon dynamically shows options based on the tab the user is on (i.e., if a user is on a Domain tab, s/he will see Save View, Save View As, Manage Views). Under the gear icon, the following apply:

- When a user is on a Company Hub tab, s/he does not see the options to **Print** or **Reset Configuration** as they are not supported options.

- When user is on a Custom tab and does not have permission to modify (**User Can Modify** is disabled), the **Reset Configuration** option is not available.

Edit Mode Toggle Disabled Without Permission to Modify Dashboard

WFR-220191: When a user does not have permission to modify their dashboard, s/he also does not have access to the Edit Mode toggle. The following items are not available to the user:

- The Edit Mode toggle

- The Enable Edit Mode item in the Gear menu

- The Ellipsis menu for Widgets

All edit options are absent on the Company Hub tabs. Edit options are available for users on the Domain tabs in accordance with the Saved View permissions.

Company Hub Tabs Available Independently from Other Tabs

WFR-221132: If **Show Custom Dashboards**, **Show Domain Dashboards** and **Show My Dashboard** toggles are off, but the Company Hub tabs are on, users see an informational message about the Dashboard unable to display contents.

Admin Remains on Same Dashboard Tab After Reset Layout

WFR-216436: When a Company Admin makes changes to a specific tab on the Dashboard Layout Profile and clicks Reset Changes, s/he remains on the same tab after the layout is reset. If an Admin clicks Reset Layout without saving a recently created tab, s/he is redirected to the first Custom tab. If no Custom tabs exist, the user is redirected to the first Company Hub tab.

Events Widget Added to List of Available Widgets on the Company Hub Tab

WFR-226788: Where the Add Widgets pop-up is presented on the page, the Events widget is now included in the list of Available Widgets, and can be selected to add to the Company Hub tab.

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Dashboard Widgets

New Widgets Available

> **Note:** The additional Dashboard widgets may not be available immediately following the release. These new widgets will be steadily rolled out to companies after the initial release date for each POD. The widgets will be made available via a gradual rollout across the 3-4 weeks following the April 2021 release.

The following widgets are now available for use in the New UI Dashboard:

- Leave of Absence Cases, including the ability to create new cases.

- Events

- Employees

- ACA Compliance Overview

- Time Summary

- Content

> **Note:** The **# Items to Show** option has been removed from the Classic Dashboard widget, which allows the Classic and New UI to support the ability to use date range-based filtering.

Content Widget: New!

WFR-183527, WFR-187061, WFR-192224: A new **Content Widget** is now available so you can add customizable content pertaining to your specific company needs. Multiple widgets can be created and added to the tabs of your dashboards.

This content can be created and added by clicking the **Content Widget Library** button under **Company Settings > Profiles/Policies > Dashboard Layout > Content Widget Library**. Click **Add New** to create a new Content widget.

Administrators can use the **+Add** drop-down and select **Create Content Widget** option.

- Add the title that will appear to your users. Create the content and use the text editor to customize. Once saved, the widget will be added to your current tab. You can also select to make the widget transparent and without a header. This option is disabled by default.

- Title Icons are available from the drop-down list. Each item will show the icon that will display next to the title.

- If linking the information to a website, you can list the URL title in the **Title Link (External URL)** field.

Content Widget Improvements

Content Widget: Auto-Size

WFR-189642, WFR-196208: The **Auto-Size Height** checkbox has been added to the Create/Edit Content widget pop-up, allowing users to define how they handle widget height. The checkbox is enabled by default, so auto-sizing is enabled by default for new (**Create Content Widget**) and already existing Content widgets. The **Auto-Size Height** behavior works with both the Regular View with Header and the Transparent View without Header settings in the Content widget configuration.

> **Tip:** Auto size for the Content widget works when the tile is the full width of the Dashboard. It will not work, for example, when the Content widget is 1 or 2 columns width because other tiles are in the row and impact its usage.

WFR-193663: When the **Auto-Size Height** checkbox is enabled, the full-width Content widget height in the Dashboard is auto-sized according to content. Auto-sizing works for both transparent and regular Content widget versions.

The Adjust Size option is disabled (grayed out) when the Content widget is at full width and **Auto-Size Height** is enabled. Full-width width can be 1 or 2 columns width depending on the device/screen resolution. If the Content widget width is adjusted to not be full width, then the Auto-Size option is grayed out and is not applicable, and the last selected state still appears.

When editing the dashboard schedule, and clicking the **Content Widget** tab, you can remove or edit the widgets using the **Configure** and **Remove** buttons.

End User View

Adding entries will automatically create a **Content Widgets** tab in your dashboard profiles. When users click the tab, they will see the entries you created. If users have permission to edit their widgets, the **Add+** option will be available, and users can add more widgets. They cannot create or add Content Widgets.

Content Widget: Copy Company

WFR-195180, WFR-184849: When using the Copy Company functionality, the Content widget is included in the new company copied from the existing company. The Content widget is also included when using the Snapshots functionality.

Delete Previously Created Content Widgets

WFR-200711: Users who have access to the Content Widgets Library under **Company Settings > Profiles/Policies > Dashboard Layout > Content Widget Library** can now delete Content widgets when given the appropriate security permissions (View/Edit/Delete for the **Dashboard Layout Profile** security item). A new column, **Button: Delete**, has been added to the report by default. Users can delete a Content widget even when it is assigned to a Dashboard Layout Profile.

When the user clicks the **Delete** button, the following warning message appears:

"This action cannot be undone. Are you sure you want to delete Content widget settings?"

Content Widget Save Behavior

WFR-209332: The **Save** action for Content widgets now only saves the changes to the Content widget, and changes are pushed to end users when a Dashboard Layout Schedule is Reset or scheduled for a Start Date.

- Upon the Reset/Start Date of a schedule inside a Dashboard Layout profile, the Content widget changes are available to the end-users assigned to the Dashboard Layout profile.

- If other Dashboard Layout profiles contain the same Content widget, the changes are not available to the end users until the Schedules in those profiles are Reset or begin on a Start Date.

Preview Content Widget Output on Dashboard Layout Schedule

WFR-197230: Admins now have the option to preview the Content widget output on the Dashboard Layout Schedule. The **Edit Mode** toggle is enabled by default anytime a user accesses the Dashboard Layout Profile configuration page. When the **Edit Mode** toggle is enabled:

- The **Configure** and **Remove** buttons on the Content widget(s) are available.

- The Widgets and Report/Chart tiles continue to be displayed as usual without the **Edit Mode** toggle.

When the **Edit Mode** is switched off:

- The Configure and Remove buttons are hidden on the Content widget(s). The Content widget output on the Dashboard Layout Schedule page is based on the tile configuration.

- The Widgets and Report/Chart tiles continue to be displayed as usual without the **Edit Mode** toggle.

> **Note:** This behavior is not applicable to the end user Dashboard Layout Edit Mode.

Delivery Destinations

SFTP Failure Email Delivery Destinations in Data Exports and Deliver To

WFR-217911: Email Delivery Destinations that are linked to SFTP Delivery Destinations Failure Email Destinations have been removed from Data Exports and the Report "Deliver To…" list of destinations.

SFTP Connection Enhancements

WFR-205123: The following enhancements have been made to the SFTP connections for SFTP Delivery Destinations.

- When testing a connection, there is now a 3 second wait before closing the connection if it is successful.

- Additional messages have been added based upon the type of failure returned by the server.

- The port number is automatically removed from the hostname when saving or connecting.

- An error is shown when the port number is not in the valid range (1 to 65535).

Delivery Destinations Restrictions for Direct Companies on Data Exports

WFR-214652: To reduce errors/security violations, Delivery Destinations for direct client companies are now limited to Delivery Destinations that are related to that specific company. This can include Delivery Destinations created by the company or set to be visible for that client company by the Admin company. Companies using UKG Payroll Services will also see the Delivery Destinations set up by the UKG Payroll Services Admin company and set to be visible for that client company or Visible to All Companies.

New! Employee Profile Redesign

The functionality described below was already available for all customers. It was enabled the week of March 19th, 2021.

Based upon your valuable feedback, the Employee Profile (**My Team > Employee Information**), **My Profile** and **Applicant Profile** pages have has been redesigned to provide users with universally helpful features and functions desired by customers. The redesigned workspace includes:

- A compact view that optimizes the Desktop experience to allow multiple columns of widgets to be displayed, thereby reducing scrolling.

- A flexible layout that allows users to close unused widgets.

- The ability to collapse the **Jump To** panel.

- A dedicated **Profiles** panel that persists across tabs to allow configuration of Profile fields while referencing other contents on the page.

A **Jump To** Links panel now displays along the left hand side. A section with general widgets is positioned in the middle of the page, and Profiles now display on the right hand side.

Jump To Links (left panel)

This panel includes links that allow users to "jump to" specific sections/widgets within the center of the page.

- This also applies to **My Profile** and the **Applicant Profile**.

- This section can be opened/expanded and closed/collapsed using the left/right arrow in the upper right hand corner. When the section is collapsed, it can be accessed via the Jump To icon.

- Users can expand all widgets and collapse all widgets in the center section via the top link in this section (**Expand All** or **Collapse All**). The selection a user makes (Expanded or Collapsed) is saved when the user leaves and then returns to the system.

Widgets (middle section)

This section contains the applicable employee widgets, and no functional changes have been made to the widgets.

- This also applies to **My Profile** and **Applicant Profiles**.

- The layout of this section can be 1, 2 or 3 columns based on:

- 1 column with the left and right panels collapsed (768-1280 px)

- 1 column with the left and right panels opened (1280-1680 px)

- 2 columns (1680-2560 px)

- 3 columns (2560 px and above)

As the screen grows and additional columns are added, the widgets are displayed based on the order defined in **Edit Tabs**. For example, if a user has Widget A, Widget B and Widget C listed as 1, 2, and 3 in the **Edit Tabs**, and they have 3 columns, then Widgets A, B, and C are all in the first row.

- Widgets can be expanded and collapsed, and the selection made by the user is saved across sessions.

- The width of a widget is determined by the number of columns and how many widgets are expanded on a given column.

Profiles Widget (right panel)

This panel includes the Profiles available to be assigned to employees.

- This is a new section/panel. The **Profiles** widget has been moved to the right panel.

- This section can be expanded and collapsed. When collapsed, users can expand the section via the Profile icon.

- The **Profiles** widget is enabled on a tab via the **Show Profiles Panel** checkbox on the configuration (**Edit Tabs**) page.

- Profiles are accessed via the Profile icon in the header in the Mobile Application only.

Employee Profile Toggle between the Classic Look and the New Design

The functionality described below was already available for all customers. It was enabled the week of March 19th, 2021.

WFR-218798: Users can utilize a toggle to return back to the Classic view of the Employee Profile or to try out the new look. When the Employee Profile screen is in the Classic mode, the toggle allows users to **Try the New Look**. When the Employee Profile screen is in the redesigned view, the toggle allows users to go **Back to Classic**.

> **Note:** The **Try the New Look** toggle will be removed during a future release.

Cost Center Widget: Hide Fields

This functionality is only available in the multi-column (compact) Employee Profile view.

WFR-214641: Admins/users with Edit access to the Employee Profile and Cost Center Widget (Custom Permissions are applicable) and the ability to edit their tab configuration (Edit Tabs) can customize their widget to meet their own needs. The Gear icon has been added to the Cost Center widget in Edit Tabs, and when selected, a dialog appears listing all of the fields within the Cost Center widget with checkboxes next to them.

Dates Widget: Hide Fields

This functionality is only available in the multi-column (compact) Employee Profile view.

WFR-214644: Managers with Edit Access to the Employee Profile and Dates Widget can now customize the Dates widget based on their own needs. Users can quickly locate their employee's Start Date, Birthday, etc. so they know when to complete their Annual Review and send them a company Birthday Card. Other dates associated with their accounts can be hidden so it is not more difficult to quickly find the information they need. Users can only Hide/Unhide profiles they have permissions to edit via the widget.

Profiles Widget: Hide Fields

This functionality is only available in the multi-column (compact) Employee Profile view.

WFR-214642: Users with Edit Access to the Employee Profile and the Profiles Widget and the ability to edit their tab configuration (Edit Tabs) can now customize the Profiles widget based on their own needs using the gear icon for the Show Profiles Panel in Edit Tabs. Users can only hide/unhide profiles they have permissions to edit, and if a user does not have security access to a particular profile, that profile option will not appear in the show/hide pop-up.

Upon selecting the gear icon, a dialog appears that lists all fields within the Profiles widget with a checkbox next to it. All checkboxes are selected by default. If the checkbox is unselected, that field is no longer shown within the Profiles widget of this user's profile. If a profile is required, it cannot be hidden. It will appear in the configuration dialog with the checkbox selected (read-only) and a red asterisk next to the name.

Dashboard Header Configuration

This enhancement only applies to the New UI Dashboard.

WFR-217248: Users can view relevant information about themselves the header of their Dashboard. The following pieces of information always appear in the header:

- Employee Photo (or placeholder photo)

- Employee Name

Up to 3 sections of employee information can be included in the header. The order of fields is determined by the order they've been selected in via the configuration.

If one or more date options are selected, the date is reflected in the Company's date locale. If the user does not contain information for the configured field, nothing displays for the field.

Employee Profile Header Configuration

This enhancement only applies to the New Look Employee Profile (Single and Multi-Column).

WFR-217245: Users can view information about their employees that is relevant via the header in their Employee Profile using settings in the Employee Header Configuration section in the Company Setup (**Company Settings > Global Setup > Company Setup**).

Up to 3 sections of employee information can be included in the header. The information does not appear in the mini header. If one or more date options is/are selected, the date is reflected in the Company's date locale.

My Profile Header Configuration

This enhancement only applies to the New Look Employee Profile (Single and Multi-Column).

WFR-217246: Users can view relevant information about themselves via the header in My Profile. The information does not appear in the mini header. The order of the fields is determined by the order they've been selected via the configuration. If one or more date options is/are selected, the date is reflected in the Company's date locale.

Default Selection Displays for Header

WFR-229315: Default selections now display for the Employee Profile, My Profile, and Dashboard fields in the Employee Header Configuration section under **Company Settings > Global Setup > Company Setup**.

Employee Profile Mini Header Updates

WFR-189475: Updates have been made to the Employee Profile Mini Header that impact the following pages:

- Employee Profile

- My Profile

- Applicant Profile

- New UI Dashboard

Look & Feel

Teal Color Theme Applied to Home Dashboard Widgets

WFR-209576: The new UKG Ready **Teal** theme is available in the **Look & Feel (New UI)** widget under **Company Settings > Global Setup > Look & Feel > System Themes**. When selected and saved, your header will change to the UKG color scheme.

In that Start widget, any icons selected from the standard system icons will also display with the Teal color theming.

WFR-203494, WFR-214335: The Dashboard Widget for the UKG Ready **Teal** theme has been added to the **Look & Feel** page. The fields on the widget are prepopulated and non-editable, and the background image is changed to the new color.

System Theme Support in Simple Look Ups and Selection Pop Ups

WFR-209428: When the **Teal** option is selected in the **Theme** drop-down from the **Look and Feel (New UI)** widget within System Themes, the following elements are updated to align with the System Theme option:

- Simple Lookups which are not report-based: Table Header and buttons, highlighted rows (upon hovering and upon selection)

- Dialog search (Selection Pop-up)

The updates are applied to **Manage Email Schedules > Company Groups** and **Annualized Projected Hours > Time Off Lists**.

System Theme Support in the e-Signature Audit Report

WFR-209443: The system now supports the new UKG Ready **Teal** System Theme on the e-Signature Audit Report page for the following elements:

- Header

- Hover

- Selected State

System Theme Support for Mobile (Offline mode, Reports)

WFR-212035: The buttons on dialogs in Offline mode should align with the standard design, so that:

- The image with the user's initials displays when the user has no photo.

- Highlighting of EIN drop-down options is applied.

- The default UKG logo on tablets in Offline mode is visible.

- The highlighting on reports/report-based lookups has been updated in accordance with the system theming option.

- When a column filter is applied, the column background color is secondary.

System Theming Support for Toggle Button and TabsSet

WFR-216453: When the **Teal** option is selected in the Theme drop-down from the Look and Feel (New UI) widget within System Themes, the toggle button now displays in the appropriate color to match the theme. Additionally, for the TabsSet, the color of the line above the selected tab is consistent with the **Teal** theme, including for the My Mailbox tab.

Personalized Experience / readyConnect

Employee Birthday Redirect Change

WFR-218806: Users are now redirected to the Birthday calendar page when they select the Employee Birthday's Today Task. When selected, the user is redirected to **HR > Reports > Birthday Calendar by Week**. The report is filtered by today.

Events in My Topics Sorted Based on Priority

WFR-219946: Users can now see prioritized topics in My Topics so they will see the most important things first. Priorities impact the order an Event/Topics appear(s) in the following areas:

- **Dashboard CTA with Today's Task:** Priority 1 appears as the first green pill, followed by priority 2 as the second green pill, etc.

- **Dashboard CTA without Today's Task:** Priority 1 is the full Call to Action, Priority 2 is a green pill, etc.

- **My Topics list (readyConnect):** List reflects the priority order (i.e. Priority 1 is first, priority 2 is second, etc.)

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Unread Indicator in My Topics List

WFR-225683: Users can see the red dot indicator above the readyConnect header icon, so now when they open the My Topics tab, there is an indicator identifying the topic(s) they have not yet viewed.

A blue dot indicator displays next to any event in the My Topics list that has not yet been viewed by the user. The appearance of the blue dot follows the same rules as the blue dot that appears in the Dashboard Call To Actions when an event has not yet been viewed. Once the user views the topic, the blue dot no longer appears.

Platform

IMPORTANT! Right Click Support

WFR-230142: Navigation through right click mouse interactions may have unpredictable behavior based on the page or link being accessed. This feature is native to the internet browser, and is not a standard feature within the product, so the behavior may not be as expected at all times.

IMPORTANT! End of Life Plan for Internet Explorer 11

WFR-230143: In order to provide a modern and secure experience for our direct customers and partners, UKG Ready will end support for IE11 after the April (R74) 2021 release. Although the browser will continue to work, like the traffic UKG still sees from older versions of Internet Explorer, IE11 will no longer be qualified within the release readiness process, and IE11-specific defects will no longer be accepted.

Additional information can be found here: https://www.kronos.com/blogs/working-smarter-cafe/2021-3/what-deprecation-microsoft-ie-11s-browser-means-ukg-ready-customers

Login Pages in Application

WFR-220796: In this release we are unifying the Login pages within the application so users, regardless of company type, will see the same UKG branded Login page. If you have customized your logo, that will not be affected by the consolidation effort and will still display. If you would like to change your logo, you can download UKG specific logos within the Media Kit on the UKG Newsroom Branding Site - located in the right panel of the page (or directly here.) Instructions on changing your logos can be found in the **Look & Feel** section of the **Global Setup User Guide**.

Icon Updates in Application

WFR-200590: The Question Mark icon and Community Help logo have been replaced with a new Personal Experience panel icon.

WFR-206003: The Live Chat icon has been updated to indicate if it is online (green dot) or offline (gray dot). Colors of the dots may change depending on the color theme in use. The icon will not appear for mobile, but Live Chat can still be accessed via the readyConnect icon.

Live Chat: Kronos Name Replaced

WFR-209615: When connecting to Live Chat, the Kronos name has been updated to the new company name of UKG, i.e. UKG Global Support.

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Update New UI Preferences Widget

WFR-227808: The New UI Preferences widget within the security profile (**Company Settings > Profiles/Policies > Security**) has been updated to apply to the Mobile Application specifically. The widget has been renamed Mobile Preferences.

- The Enable Mobile option has been renamed Mobile.

- The Login Credentials (Mobile Only) has been renamed Login Credentials.

- The Mobile Punch Settings has been renamed Offline Punch Settings.

- Throughout the security items, New UI Preferences has been updated to Mobile Preferences.

These updates also apply to the security profiles in an Admin company under **Maintenance > Companies > Client Resources > Global > Security Profiles**. No change has been made to the existing functionality.

An informational icon next to the Offline Punch Settings reads: **The following punch settings control the visibility of punch options for offline mobile support and the clock widget (mobile device only) within the dashboard**.

Padding Between Buttons and Inline Message in Report-Based Widgets

WFR-184989: In the report-based widgets such as the Timesheet Awaiting My Approval widget, in the New UI Dashboard there is padding between the buttons and inline message, which improves the readability of these objects.

Support of Universal/Application Links

WFR-167467: Support of universal/application links to iOS and Android is now available. When a 3rd party application (i.e. UltiPro mobile or browser) uses a platform (iOS/Android) to open an app link, the UKG Ready Mobile App is opened if installed.

Reports

Row-Level Actions in Report/Chart Tiles

WFR-203082: Row-based actions that were previously not yet supported for certain reports when they were placed in Report/Chart tiles are now supported. These columns no longer appear without the icons, and users can now execute a particular action (i.e., Edit, View, Preview, etc.). Work is in progress to address any remaining not yet supported actions in upcoming releases.

Prevent Overriding with Deletion Is Not Allowed Setting

WFR-148350: Users can prevent overriding views with the **Deletion is not Allowed** setting enabled. The **Deletion Is Not Allowed** setting has been renamed **Deletion and Overwriting Is Not Allowed** in Save View, Save View As, and Edit (Save View pop-up triggered via Manage Views/ Edit from My Saved Reports page).

If a user saved the view with the **Deletion is not Allowed** setting enabled, then the Save View action is grayed-out within the report action popover.

Dashboard Framework

Added Pay Period Profile Selector to Time Summary Report

WFR-218487: Previously, a filtering option to select a Pay Period profile in the **Time Summary** report was not available.

What's changed: A filter option is now available in the **Time Summary** report so that you can select a specific Pay Period profile. The selector will include all Pay Period profiles in your company.

> **Note:** For TLM Enterprise customers, the **Time Summary** report is currently only available inside the New UI Dashboard widget, **Time Summary**.

Security

Add Make Default for All Security Item to Permission Dashboard

WFR-208660: The security item **Make Default for All** has been added to the security profile in the **Sharing** section on the Dashboard tab. This item permits/restricts setting of the Company Default view for all users in the company.

The **Dashboard Sharing** and **Manage Company Type Views** security options should also be enabled when enabling **Make Default for All**. When the security item **Make Default for All** is enabled, then the related checkbox is displayed under the **Shared With All** radio button on the **Save View...** and **Save View As...** .

Feature Retirements

The table below documents functionality that has been retired or is planned to be retired. This table will be updated as needed with every system release.

Retirements History

Product or Component	Feature	Menu Path	User Experience	Reason	Retirement Date
TLM	Classic Timesheet view	N/A	All	All timesheet users will be switched to the New Timesheet view, and the Classic Timesheet view will no longer be available.	June 2021
TLM	Rules Analysis page	*Team > Time > Reports > Time Allocation > Rules Analysis* and *My Info > My Reports > Time Allocation > Rules Analysis*	All	This page will no longer be supported.	June 2021
Platform	Internet Explorer 11 – End of Support	N/A	Platform	In order to provide a modern and secure experience for our direct customers and partners, UKG Ready will end support for IE11 after the April (R74) release	April 2021
Scheduler	Schedule Table View	*Team > Schedule > Schedules*	All	This view is not user-friendly. From any of the views, Print Preview will still be available, which includes the same information for printing with additional options as to which shifts should be included in the printout.	April 2021
Scheduler	Schedule Overview By Date Range	*Team > Schedule > Schedule Overview*	All	This view is not user-friendly. You will still be able to bring in multiple schedules via the Summary By Employee report, but not in a schedule-like view.	April 2021