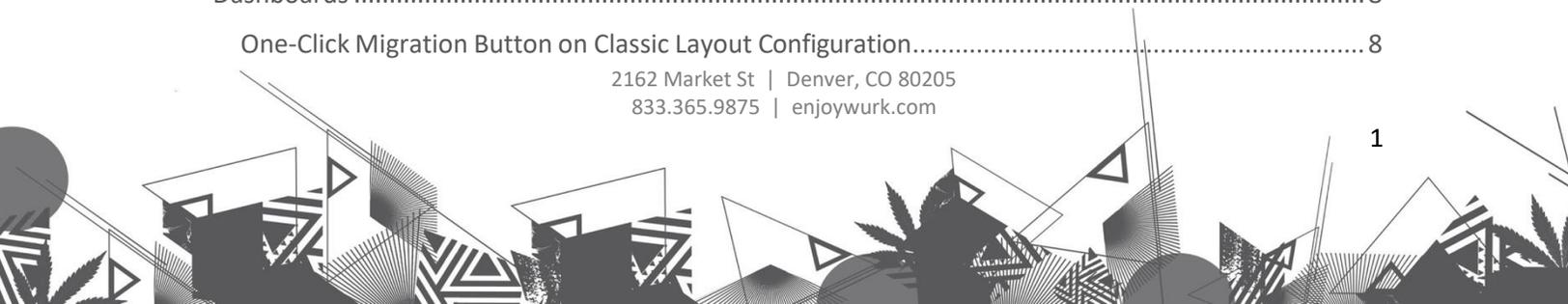# würk

Release 81, June 2022

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

Table of Contents

Payroll

Employee Columns Added to Reports

In several reports that didn't previously include these columns, the following columns are now available to add:

- Employee Address: PSD Code: This column is for employees in Pennsylvania.
- Employee: Last Paid Date
- Employee: Payroll Job Title
- Employee Address: Transit District Code: This column is for employees in Oregon. If the column is visible for an employee who has no value entered for this code, the column displays a zero.

Completed Payroll Prep Steps can be Reset

In Payroll Prep, you could select **Mark As Complete** for steps to set them as Completed, but you could not return a Completed step to an incomplete state. Now you can use the new **Reset** button to change a Completed step back to an incomplete state. After you select the **Reset** button, the **Mark As Complete** button returns to the step.

TLM

Option for Change CC Allocation to show CCs Not in Limit List

System administrators now have the option in the New Timesheet to allow or not allow managers to choose cost centers that are not in an employee's limit list when changing the cost center allocation via the Timesheet Profile.

In the Timesheet Punch Settings widget of the Timesheet Profile, if the settings **Show Change Cost Centers Time Allocation** and **Allow Cost Centers Not in Limit List** are enabled, the manager can allocate to all Cost Centers that allow time allocation, and is not limited to only those cost centers in the employee's limit list.

If the Allow Cost Centers Not in Limit List setting is disabled, the Change Cost Center Allocation option in the timesheet will only allow the manager to allocate to Cost Centers on the employee's limit list.

Copy and Paste Cost Centers on Timesheet

You can now copy and paste Cost Centers from one time entry to another time entry on the timesheet. This works for any Cost Center Global settings, such as Full Path, Abbr. Path, and External id.

HR

Custom Forms

Custom Form Details Report: Prepared Reports

Some larger companies experienced difficulty utilizing the Custom Form Details report (HR > Forms > Other Forms > Detailed Report) because it took so long to load. Now, if a user attempts to load the report and it's unable to load, the user is prompted with a pop-up to continue processing the report in the background. The My Completed Reports functionality is required for this option to be available.

If the user selects Run Report, the following message appears on the report:

Data for the report view [System] is currently being processed and will be available soon in My Completed Reports.

Once loading is complete, the user sees a Toast message on the page they are on explaining that the report is ready to download.
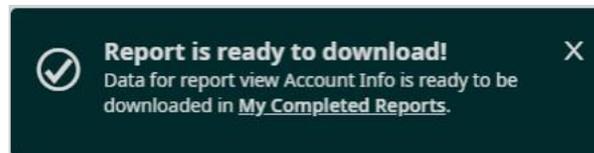
A link in the inline message and Toast message takes the user to My Completed Reports (**My Reports > My Completed Reports**). From My Completed Reports, the user can download the report in any supported format.

Courses/Certifications

Full Text Editor Added to Courses/Certifications

A full text editor has been added to the Description fields in the Course/Certification configuration page, located under Settings > HR Setup > Courses/Certifications. This has benefits to both HR core and Learning.

Employee Maintenance

Masking of Employee and Account Information

In our last release, we introduced the masking of National ID numbers for employees and their account contacts. We noted that while most areas of the system were completed, the masking of these numbers across the system was not yet complete for certain areas and would be covered in the future releases. Below are some more updates to this functionality.

Masking of Account Numbers: Direct Deposit: Admin Level

A new security option at the Admin level to restrict or give permission for users to view an employee's full account number from Employee Information in the **Direct Deposit** widget is now available. In the Security Profile (**Maintenance > Companies > Client Resources > Security Profiles**), enable or disable the **Unmasked** checkbox next to **Direct Deposits** in the **Employee** widget under the **HR** tab.

If this checkbox option is enabled, the bank Account # will be masked by default and the last 4 digits (if the Account # contains 6 or more digits) or last 3 digits (if the Account # contains fewer than 6 digits) will be visible. When adding/editing a Direct Deposit, an eye icon will display next to the **Account #** field. If the eye icon is selected, the full bank Account # will be visible.

If this checkbox option is disabled, the eye icon will be grayed out so that users cannot select it to make the Account # visible.

Masking of Employee's Own National ID on Employee PDF

When downloading a PDF from the Employee My Profile page, the employee's full National ID will be masked (*** all except last 4 digits) on the Employee PDF regardless of their security to view Masked/Unmasked in Security Profiles. This will affect ESS (Employee Self Service) and MSS (Manager Self Service).

Note: Masking is available in the PDF for SIN, NIN, SSN, and BSN. Future enhancements will add National IDs for Social Security France, TFN, and Other National IDs not included in this release.

Masking of Account Contacts National IDs in PDFs

In this system release, PDFs downloaded from Employee Information will now mask the National ID numbers of the employee's Account Contacts regardless of a user's security permissions to view masked or unmasked numbers.

Employee Information Report Page: New Age Band Column Added

A new **Age Band** column has been added to the Employee Information report page that will you to easily group your employees by age band. This is not a default column and must be added via Add/Remove Columns by selecting **Employee: Age Band** from Available Columns.

The age ranges will display in decades, i.e., 30-39, 40-49, 50-59, etc. If the age is between 0 and 19, it will display this range as Under 20.

Note: Use a custom column if you require different age bands. This formula can be used and you would only need to update the ages as they pertain to your company needs.

If(AND(Value(EmplAge) > 0,Value(EmplAge) < 20),"Teen",If(AND(Value(EmplAge) >= 20, Value(EmplAge) < 30),"20-29",If (AND(Value(EmplAge) >= 30,Value(EmplAge) < 40),"30-39",If(AND(Value(EmplAge) >= 40, Value(EmplAge) < 50),"40- 49","Over 50"))))

Surveys

Branding Updates

Our current branding standards have been applied to Surveys. This includes updates to buttons, fonts, colors, progress bar, alignment of text and icons, and pop-up messages. Here are a few things you may notice:

1. On the Survey Logic Tab: Add is now a button in middle of screen (prior to adding any logic) vs showing in top right corner with a label **Create a rule to customize the flow of the survey**.
2. Translation Tab: Add button now shows properly and text appears in gray (vs the word Translation) in the columns where translations can by typed.
3. Minor bug issues resolved.

New Security Option Added to Remove Surveys Menu

A new **Surveys** security option for has been added to security profiles that will control visibility to surveys via **My Info > My HR > Surveys**. The new **Surveys** permission is located in the **Employee** section of the **ESS** tab of security profiles. Setting this to **View** will display the menu path and allow employees to view surveys. The default position is **Blank** which will hide the menu option and prevent employees from accessing surveys, however for backwards compatibility, for existing customers who have at least one survey assigned to at least one employee, the default will be View which can be changed to Blank if required.

Cross Product

New Look Toggle Removed from Checklist

The **Back to old checklist** link has been removed from the Checklist Panel, and the Exit Checklist button is now positioned in the center of the Checklist Panel. The only available version of the checklist is now the New Look, and the old Checklist view is not accessible even if it is bookmarked.

Demographics: New Option Added to Disability Drop-Down

A new **I Do Not Wish to Answer** option has been added to the drop-down list for the Disability demographic in Employee Profiles. Formerly, Yes and No were the only options. This response will display on reports and PDFs just as the other options do.

Note: This option will be added to the Employees Import template in a future release.

Groups Display Permission for Report Group Selection Lookups

If the security permission to **Show All Groups** is disabled, when a user views a Company Groups list (including a Company Groups list in an Advanced Filter), the user views only those groups they are either

a member of or a manager of. This applies to all areas of reporting where company groups are listed, such as:

- Employee Filters
- Report View Sharing Options
- Advanced Filter: Company Groups
- Email Schedule Configuration - Manage Email Schedule is available for a saved view (personal, not shared)
- Report View Sharing Options - Advanced Filter
- Dashboard Module Saved View Sharing Options
- HR > Checklists > Checklists > Assign New – Employee(s)
- HR > Surveys > Survey Collectors > Add New – Employee(s)
- Learning > Trainings / Certifications > Add New – Employee(s)
- Payroll > Employee Payroll Maintenance > Deductions > Add New – Multiple Employees
- Payroll > Employee Payroll Maintenance > Earnings > Add New – Multiple Employees
- Payroll > Process Timesheets > Pay Period Functions > Create Payroll Interface File – Edit Export Filters
- Recruitment > Candidates > Applicants > View Applicant > Interviews – Interview Participants
- ESS and MSS Workflow Delegations > Workflow Group

Additionally, the **All Company Employees** group is hidden in the Company Groups tab, the Employee Lookup, and all group selection lookups. This prevents selection of the group by regular employees and managers when using the group selection, unless they are a manager of that group.

If an Employee Filter or Shared report selection has been previously configured with a group (hidden from the list when **Show All Groups** is disabled), when a user opens the Employee Lookup or the appropriate email setting, the user sees the previously selected group name on the Selected Tab. However, the user does not see that group in the **Available > Group Tab**.

If the security permission to **Show All Groups** is enabled, when a user views a Company Groups list, the user views all Company Groups regardless of whether the user is a member or manager of the group.

Important: The permission behavior only applies to Client level companies and does not impact Admin level reports. For a company with only the Admin sub-system enabled (no Client level sub-systems enabled), the **Show All Groups** permission is not available in the Admin Security profile (under **Maintenance > Admin Company > Configurations > Security Profiles**). When a user with an Admin Security Profile views a groups list in any report available to them, the user always sees all Account Groups in the list without any limitations.

Dashboards

One-Click Migration Button on Classic Layout Configuration

Users can now see and select a one-click migration button on the Classic Dashboard Layout Configuration page, allowing them to easily organize the migration to the New UI Dashboard. A new option or action, **Copy To New UI**, is now available at the top of the Classic Dashboard Layout Configuration page (Dashboard > Edit Tabs Configuration) to the right of the Reset Windows button.

The **Copy To New UI** option remains visible even after it is clicked, and allows for an unlimited number of clicks by any user inside their personal, Classic Dashboard configuration.

Note: The one-click message currently disappears on both the Classic and New UI dashboards end-user experience once it is clicked the first time.

Bug Fixes

Recruitment: Signed offer letter wasn't retained

When an applicant uploaded a signed offer letter before being hired, after they were hired, the system sometimes didn't retain the signed version of the offer letter. This is fixed, and the system now retains the saved version of the offer letter.

ACA: Rehiring Employee Twice Caused Measurement to Restart

When an employee was hired and terminated multiple times, the system sometimes incorrectly calculated or restarted the employee's Initial Measurement period and Break In Service time. This is fixed, and the system now correctly handles the Initial Measurement period and Break In Service time for employees who are hired and terminated multiple times.