# isolved | Time v7.0/v7.1 Features and Development Items

The following new features and development items are included in this isolved release. This summary is intended to provide you with a basic overview of the changes made to the program with this release.

## Features:

The following new features are included with this release:

### Add Notes section to Leave Accruals UI [NS 982] [Item 23506]

Clients requested the ability to enter notes when updating accrual balances.

Added a "Notes" section to the Employee Management > Employee Benefits > Leave Accruals page. Notes are saved with and tied to the updated balance.



### Add indicator to Accrual Balance History when a balance update occurred [Item 131262]

When a balance update has occurred an informational icon now shows next to the starting balance on the Employee Management > Employee Benefits > Accrual Balance History page.

When you hover over the icon, the text "Balance Update" displays.

if a note was added when updating the balance, the note is appended to the hover-over text "Balance Update: [Note]" (ie "Balance Update: Accrual was set up incorrectly")

# Scheduling: Calendar Rules permissions for Unavailability [Item 101909]

In Calendar Rules, a permission has been added to enable/disable the "Unavailability" for ESS Users.



- Under the **My Calendar** section, the "Allow Employee Unavailability for ESS" option has been added.
  - o This option only displays if the "isolved Scheduling" Legal Service is enabled.
  - o Unavailability is enabled by default.
  - o This option is only applicable to ess users. Client, Partner and Service users may still have access to enter information for employees.
  - o If enabled, the "Unavailability" link is shown in the menu bar.
  - o If disabled, the "Unavailability" link is hidden in the menu bar.
- Under the **My Calendar** section, the "Display Employee Unavailability for ESS" option has been added.
  - o This option only displays if the "isolved Scheduling" Legal Service is enabled.
  - o This option is enabled by default.
  - o This option is only applicable to ess users. Client, Partner and Service users will still have access to enter information for employees.
  - o Unavailable date/times are not displayed in the calendar when disabled.
  - o If "Allow Employee Unavailability" is disabled and "Display Employee Unavailability" is enabled, unavailable dates/times are shown, but no action to enter unavailability is allowed.

## Allow Partner users the ability to verify Time Cards across multiple clients [NS 5194] [Item 99498]

Added the ability for Partner Users to now verify Time Cards for any Time Cards they are allowed. This behavior matches that of Client and Service users.

## Absences to adhere to policy group setting crossing boundaries [NS 7261] [Item 124811]

- Logic is applied at the time of commit when processing the absence through Time.
- The absence is processed based on the employee's day start time in the Policy Group and boundary settings.
- Once committed, the approved entry is updated to show two absences before day start and after day start when absences are set to be split.
- Once committed, the absence screen will split the absence to show what hours were processed with the 1st payroll run and remaining hours for next pay run. Audit history indicates the split absence was created by the system processor.
- Account for process to start time/end time/split/majority (start if equal)/majority (end if equal)/majority (split if equal).
- Regardless of the commit process, absence is shown as split on the Time Card screen (if the Policy Group is splitting).
- The action is reversed on uncommit.

## Time Card: Add Scheduler link on Time Card [Item 104277]

Added a "View Scheduler" button on TC that when pressed, will navigate the user (with permissions) to the scheduler with the originating employee on the TC filtered to the same week view as the TC. This will pull the start date of the pay period view and generate 7 days. This includes when the pay period is in Pay Period/Week/Day view and/or is a Bi-Weekly, Semi-Monthly, or Monthly pay group.

Only available when isolved attendance service is enabled
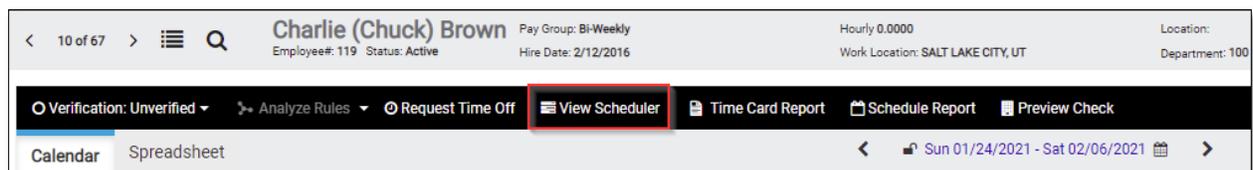
# Maintenance Items:

The following maintenance items are included with this release:

| Description | Item # |
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| **Scheduling: Prevent requests on the Employee Calendar from saving when the requested date falls under a committed/processed period.**<br>**Issue:** Currently employees and other users can submit requests on the Employee Calendar despite the date requested falling into a committed or processed period.<br>**Resolution:** Added validation during the save process so that if the requested date would appear under a committed or processed period, the request is not saved. | 125998 |
| **Scheduling: Allow users to request shift from calendar without having permissions to the scheduler.**<br>**Issue:** When the Employee Self-Service role does not allow access as an ESS to the Scheduler, as an ESS user i get a failed to save message when adding a shift.<br>**Resolution:** Employees are allowed to request shifts even if they don't have scheduler permissions with the "TimecardscheduleAPi" security object. | 103533 |
| **Don't include Forecasting in the Time Off Balances screen for accrual plans that are "No accrual - balance only" and "Hours Worked."**<br>**Issue:** The Time Off Balances screen is currently showing accrual plans that have no scheduled accrual (no accrual - balance only). This is causing confusion for clients and employees as the screen is attempting to calculate forecasting when there is no forecasted balance available.<br>**Resolution:** Forecasting for no accrual - balance only and hours worked accruals plans are now removed. | 124942 |
| **Need to restrict labor group items no larger than a 32 bit integer 2,147,483,647**<br>**Issue:** For the mobile app and clocks to handle labor groups correctly, the labor group number needs to be less than the 32 bit integer of 2,147,483,647.<br>**Resolution:** The labor group item number has been limited to no numbers greater than 2147483647. | 126361 |
| **[NS 5583] Report Writer: The Time & Attendance Date Range report type is not giving correct results when crossing pay periods.**<br>**Issue:** When the "Time & Attendance Date Range" report option is used in Report Writer, it is not accurately giving data that crosses pay periods. If the report is run with a date range that matches a pay period exactly, the report is correct. If it is run with a date range that crosses pay periods, the report is inaccurate.<br>**Resolution:** Corrected report logic to address date ranges crossing pay periods. | 131997 |
| **[NS 4911] isolved I Time - Meal Gap is not being recognized as a Meal by Alerts and a corresponding Meal Window rule.**<br>**Issue:** When using a meal rule that has both a Meal Gap and a Meal Window rule, if a Meal Gap gets triggered, alerts and hours allocation rules are not recognizing the meal gap punches which triggers erroneous alerts.<br>**Resolution:** When a Meal Gap is triggered, HARs and Alerts will recognize the meal and adjust the alerts and earnings as expected. | 118950 |

| Description | Item # |
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| **Labor Groups: Labor Value Selection restrict, select all not selecting all.**<br><br>**Issue:** When you are in the restrict section of labor groups, the select all option doesn't select all, but if you select it, the options change and now it is a deselect all.<br><br>**Resolution:** Addressed the "Select All" logic for the labor group restriction. | 131690 |
| **Award hours to shift not triggering the holiday to display when holiday is looking for a worked shift.**<br><br>**Issue:** When you have award to schedule and a holiday rule that awards when there are hours before the holiday, the holiday is not displaying. If you change the holiday rule to award with hours in previous days not worked shifts it will display.<br><br>**Resolution:** Addressed holiday logic for award to schedule. | 130698 |
| **Labor Group selections on the Punch Page do not load when they are tied to multiple labor fields.**<br><br>**Issue:** If you have a Labor Group tied to multiple labor fields, the group will not be able to be selected when an employee tries to make a Detailed Punch from the ESS Punch Page.<br><br>**Resolution:** Labor Groups tied to multiple labor fields are able to be selected when making a Detailed Punch from the ESS Punch Page. | 131685 |
| **Scheduling: Validation preventing users from overlapping schedules with Shift Requests and Shift Change Requests is no longer working.**<br><br>**Issue:** When a user opens the My Calendar and submits a Shift Change Request, they should be prevented from saving them to dates that overlap with other shifts. Likewise, if I have a Default Schedule in place I should not be allowed to save a Shift Request or Shift Change Request and currently I am able to save these.<br><br>**Resolution:** Shift Change Requests will no longer save if they overlap with an existing shift. Shift Requests and Shift Change Requests are validated against Default Schedules. | 129147 |
| **Applying one shift filter to another causes display issues.**<br><br>**Issue:** When I load the Scheduler and apply a Shift filter, then apply a different filter, I can see it display the shifts lumped together. It appears to load the correct records, but not on the correct dates.<br><br>**Resolution:** The data now loads just as if you had only applied the latest filter and none of the previous ones. | 131636 |
| **[NS 7326] Scheduler display issue when applying a Shift filter and navigating between date ranges.**<br><br>**Issue:** When I apply a Shift filter while logged in as a Supervisor, I am seeing some screwy display with regards to how and what shift records appear on the Scheduler.<br><br>**Resolution:** Navigating between date ranges now retains the filters selected. Going back and forth is seamless. If filters have to be re-applied, they are displayed on the correct dates. | 112094 |
| **[NS 7006] Alert Monitoring widget in My Dashboard is giving unexpected results for certain date ranges and Missing Punch alerts.**<br><br>**Issue:** When entering a date range other than the start and end of a pay period or actual week, and searching for Missing Punch alerts, the alerts will show up even when the alert fell on a date that was not within the date range entered.<br><br>**Resolution:** When searching specifically for Missing Punch alerts, the alert monitoring widget now only show results for the specified date range. | 119812 |

| Description | Item # |
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| **[NS 7121] Labor Groups: Adding a labor item without top level will create the item multiple times.**<br><br>**Issue:** When you add a Labor item to a LG and you don't select the top labor item field it will duplicate the list for each one without a top value.<br><br>**Resolution:** Entries will no longer duplicate when you don't select a top labor value. | 64805 |
| **[NS 7318] Scheduling: Coverage Requests - Coverage pending records have 0 duration on My Calendar when the shift has a comment, labor, or a meal/break rule.**<br><br>**Issue:** I assigned two different shifts to my employee. One of the shifts had labor assigned as a default, and the other had a meal/break rule assigned by default. I had the employee submit a Coverage Request for each of these shifts. The My Calendar displays a 0 duration on the requested coverage.<br><br>**Resolution:** Duration reflects the proper hours the Coverage Pending record has. | 111771 |
| **[NS 7317] Scheduling: Coverage Requests - Employee from one team is unable to see the coverage request from another employee on a separate team.**<br><br>**Issue:** Coverage Requests are supposed to use Eligibility Rules to filter who can and can't see coverage requests from other employees. Currently this is working based on Teams as well.<br><br>**Resolution:** The list of employees who appear on the Coverage Requests tab are now based on Eligibility Rules. So an employee from Team B can see a coverage request from an employee in Team A. | 111412 |
| **[NS 7316] Scheduling: Coverage Requests - Employees dashboard message doesn't work with other employee requests.**<br><br>**Issue:** If an employee logs in and checks the My Dashboard it will indicate if they have any coverage requests, but if other employees have made requests, then it won't tell the employee about any requests they may cover based on eligibility.<br><br>**Resolution:** My Dashboard messaging now looks at any other employee coverage requests the user logged into isolved is eligible to cover. The message indicates that the user is able to cover these shifts.<br><br>The dashboard coverage item is limited to only employee role. When clicking on the coverage requests link in the dashboard, EE is driven to the "my calendar/coverage requests" tab. Non-employee users will not see the link on the dashboard, but they will be able to still go to the coverage requests on the calendar and request in behalf of an employee. The ability for non-employee roles to view the dashboard link will need to be a different mechanism and will be addressed for the future. | 111404 |
| **[NS 7295] Scheduler: Cannot Delete a draft or posted shift when the work location has no time zone.**<br><br>**Issue:** Using Scheduling and you have a drafted shift and the employee does not have a time zone on their location you get a message that the shifts cannot overlap, if you have a posted shift, it will just spin.<br><br>**Resolution:** The legal time zone is used for employees that don't have a time zone set on their work location. | 112226 |
| **[NS 7315] Scheduling: Pending Coverage request Scheduler slide-out display with notes.**<br><br>**Issue:** When using the AS Coverage request and the shift has a lot of notes the slide-out on the scheduler will not display all the information.<br><br>**Resolution:** The display of the linked shift for coverage information is allowed for when there are notes. | 111147 |

| Description | Item # |
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| **[NS 7734] Accruals: Forecast issues specific to Last Pay and First Pay accrual awards - issue affects Forecast Accruals Report and TOB screen.**<br><br>**Issue:** There are issues with the award forecast for specific types of accruals. These accruals award on Last Pay of and First Pay of factors.<br><br>**Resolution:** The forecast logic is now able to properly indicate when the employee's next accrual awards will happen and reflect that on both the Forecast Accruals Report and the TOB screen. | 129304 |
| **[NS 7123] Accrual Forecasting - Last Pay of Month forecasting is not populating awards on Forecast report or Time Off Balance screen.**<br><br>**Issue:** Accrual is set up with a pay frequency of Last Pay of Month. This is assigned to some employees where the payroll run schedule was removed and then added back in. The accrual projections do not show award projections from the Time Off Balance screen nor on the Forecast Accruals Report. If assigning the accrual to someone else on a different pay group the projections still work.<br><br>**Resolution:** The accrual processing now handles the scenario above. For both employees will see projected awards on the Time Off Balance screen and on the report. | 117226 |
| **[NS 7519] Schedules that cross the Spring DST change show up an hour earlier in the time cards the week after the DST change.**<br><br>**Issue:** Going forward to the Spring 2021 DST change, 3/14/2021, if an EE has the same schedule the week before the change and the week after, or they have a default schedule, the shift shows up in the time card an hour earlier after the DST change occurs.<br><br>**Resolution:** Shifts should show at the correct times regardless of the DST changes. | 128377 |
| **Time reports ran across pay periods will not display correct information**<br><br>**Issue:** when you have OT or auto breaks and/or auto meals and you run a report that encompass a date range that is more than the pay period date range these record types are not displayed on the report.<br><br>&bull; Hours Detail report<br>&bull; Hours Breakdown Summary<br>&bull; Time Card preview (rolling)<br>&bull; Time Card Report (Basic)<br>&bull; Time Card Report<br><br>**Resoultion:** Correct crossing pay period report logic. | 132850 |
| **[NS 4185] An auto generated meal policy is causing the Labor Mismatch alert if the labor is changed on the punches for the first hour block.**<br><br>**Issue:** The client is using an auto generated meal rule. The EEs are punching at the start and end of the day. The auto meal generates as it should. Then a user with rights wants to change the labor for the first half of the day. They edit the first normal IN punch and the first Meal punch to a different labor. When Show Results is selected there is a labor mismatch alert for the first half of the day even though that punch pair has the same labor assigned.<br><br>**Resolution:** Editing the punches that fall before an auto generated meal should not produce a labor mismatch alert if the labor for both punches is the same. | 119877 |

| Description | Item # |
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| **[NS 7328] Edit meals and Breaks, not calcuating correct summary of hours**<br><br>**Issue:** When editing auto generating meals and breaks on an hour record if you edit the break before the meal the timecard will not auto calculate the new in time after the meal.<br><br>Edit the meal then the break the auto generated time will calculate correctly<br><br>**Resolution:** Do not allow multiple edits in the same contiguous hour set before showing results. | 109541 |
| **[NS 7330] Delete Auto generated hours from Meal threshold**<br><br>**Issue:** When you delete auto generated meals and breaks the punches on the day do not combine<br><br>**Resolution:** Do not allow multiple deletions on the same contiguous hour set before showing results. | 109423 |
| **[NS 7232] The HAR type "Apply Hours to Schedule" does not work correctly when the the option "Apply on Days: ANY" is used in conjunction.**<br><br>**Issue:** Clients want hours to auto generate in time cards for EEs that have a schedule, regardless if the time cards already have hours or not<br><br>**Resolution:** The "Apply Hours to: ANY" option should populate auto generated hours whether there are hours in the time card or not. | 123242 |
| **Menu Under Construction message on Time Entry Grid after committing a period with split absences**<br><br>**Issue:** I took Erica Adams and added some absences that cross the day start. She is set to Split time for her Policy Group Crossing Boundary setup. The absences fall crossing a holiday, the end of the OT week and even the end of the Period.<br><br>**Resolution:** Time Entry Grid should load | 129486 |
| **Absence crossing day start prevents Employee Calendar from loading**<br><br>**Issue:** After entering an absence that crosses the day start time and is split. lock and commit the period and navigate to the Employee calendar, you will get an message "this menu is still under construction" for the employee with the absence that crosses<br><br>**Resolution:** Allow for Employee Calendar to load when there is a absence that crosses day start time. | 134354 |
| **[NS 7882] Threshold Meal with shifts not awarding at the correct time**<br><br>**Issue:** When there is a threshold meal assigned to the policy group or the shift, it will not be awarded based on shift start time it will not auto generate at the correct time. If you delete the auto generated meal there will be a punch remaining at the same time the meal was generated.<br><br>**resolution:** Generate the auto meal at the correct hour threshold time. and when it is deleted, remove all punches associated with the auto generated meal. | 134307 |

| Description | Item # |
|---|---|
| **[NS 7739] The "Base on unrounded time" in a meal threshold rule is not working as expected.**<br><br>**Issue:** There is a rounding rule that rounds all punches to the nearest 10 minutes with a median of 6. The EE has the following punches on a day:<br><br>• 7:27 am - rounds to 7:30<br>• 12:29 pm Meal- rounds to 12:30<br>• 01:00 pm Meal<br>• 04:00 pm<br><br>The expected result would be a missing meal alert due to the 7:27 and 12:29 unrounded punches adding up to 5.03 hours. But the time card has no missing meal alert<br><br>If the rounding rule is removed from the policy group, the missing meal alert gets triggered<br><br>**Resolution:** When the base on unrounded time option is enabled in a threshold meal rule, the rule should then only look at unrounded punches to calculate the threshold.the rounding rule is removed from the policy group, the missing meal alert gets triggered | 132123 |
| **[NS 7508] Absences that land on the day of the Fall DST change, show up an hour earlier than what was entered when creating the absence or TOR.**<br><br>**Issue:** For the Fall DST change, if an absence lands on the day of the change the start time shows as 1 hour earlier than the start time that was entered when the absence or TOR was created.<br><br>**Resolution:** Absences that fall on the Fall DST change date should show the correct start time. | 128221 |
| **[NS 7512] Shift diff earnings are not being applied correctly at Fall DST change using the Hours within Window rule type.**<br><br>**Issue:** The client has an HAR Setup to apply a shift diff earning for hours between 11:00 pm and 7:00 am window using the Rule Type "Hours Within Window". When the Fall DST change lands and the EE works through that change forward of time, the system is giving them an extra hour of worked time, which is expected, but it isn't giving them the shift diff earning.<br><br>**Resolution:** The Hours within Window rule type should apply the proper earning when EE works through the Fall DST time change. | 128241 |
| **[NS 7327] DST indicator missing on Scheduler and Timecard for 2021**<br><br>**Issue:** DST indicator missing on Scheduler and Timecard for 2021 and forward<br><br>**Resolution:** Display DST indicator on correct days in Future years | 117653 |
| **[NS 6346] Spring 2020 DST: Using Rolling 24 OT adds OT on the day of DST.**<br><br>**Issue:** The client is using the Rolling 24 Hour OT HAR. When spring 2020 DST landed on 3/8/2020 the system gave extra time to the EE's on that date based upon the moving forward of the time.<br><br>**Resolution:** The Rolling 24 OT HAR should take into account any time change that happens for spring DST and not award OT. | 114681 |
| **Report filtering no longer defaulting to checked and report does not maintain filtering after generating**<br><br>**Issue:** Deduction Register filtering is not automatically checked which is causing a blank report. Electronic Tax Forms delivery report work location is not defaulting to checked. Multiple Reports are impacted<br><br>**Original TFS 123638:** Maintaining the filter status after clicking the Generate Report button.<br><br>**Resolution:** Rollback 123638 and implement the another fix. | 134375 |

| Description | Item # |
|---|---|
| **Scheduler: Holidays in current week are not displaying**<br>**issue:** When viewing the scheduler, holidays in the current week will not display<br>**resolution:** Display all system holidays on the scheduler | 133558 |
| **[NS 7839] A hire date of 2/29 causes oops errors on certain screens. Specifically Leave Accruals and Time Off Balances.**<br>**Issue:** A hire date of 2/29 causes oops errors on Leave Accrual and Time Off Balances Screens<br>**Resolution:** For years that don't have a leap year the carryover should happen on 3/1. | 133705 |
| **Accruals: special payroll ran the same period as the end of the calendar year rollover will rollover the balance**<br>**Issue:** Accrual processing is being triggered with special payroll<br>**Resolution:** Do not do any accrual processing, absence processing when a special payroll is ran | 133624 |