ComVida Application Suite 5.1.12 What's New

August 2020

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Overview

This release focused on enhancing key processes throughout the application suite, with a particular emphasis on Scheduling processes, Communications management, and data entry in both Payroll and AR/Trust. The highlights below provide a glimpse of the extensive improvements. User Guides, Course documents, and Tip Sheets will cover the changes and enhancements in more detail.

Main

New Report Criteria Retention

Throughout CVC51, when a report is viewed, the report criteria will be retained in memory and applied to subsequent reports within the same area for the duration of the user's current working session.

A new *Clear Criteria* button has also been added to all report pages. It will clear the stored criteria and reset the selections to the default values. (#3398)

Page Loads & Response Times

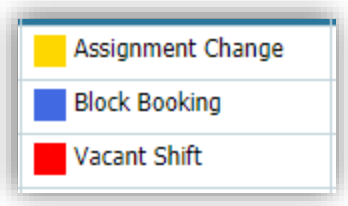
Pages and processes have been enhanced in several areas of CVC51, and depending on the system configuration, response times may be significantly improved. (#3259 & #3379)

Calendar Start Day

The Company Setting *MonthlyStartDay* will be applied to calendar pages in Self Serve and Scheduling, allowing sites to customize their calendar appearance. (#3434)

Notification Type Colours

Colours can now be assigned to the Notification Types, providing an extra visual aid for quick location and access to specific types of Notifications. The colours will be shown in the Notifications grid and used as the background colour in the new Notifications calendar page. (#3442)



Assignment Type Colours

Colour samples are now included in the Colour dropdown list to assist with colour selection. (#3485)

Filters

Modifying a Filter's Description, Is Shared or Active values will no longer clear the detailed filter settings in the lower part of the page. (#3396)

Positions

Changing the values of two Positions that have the same Position code will no longer trigger a duplicates error. (#3419)

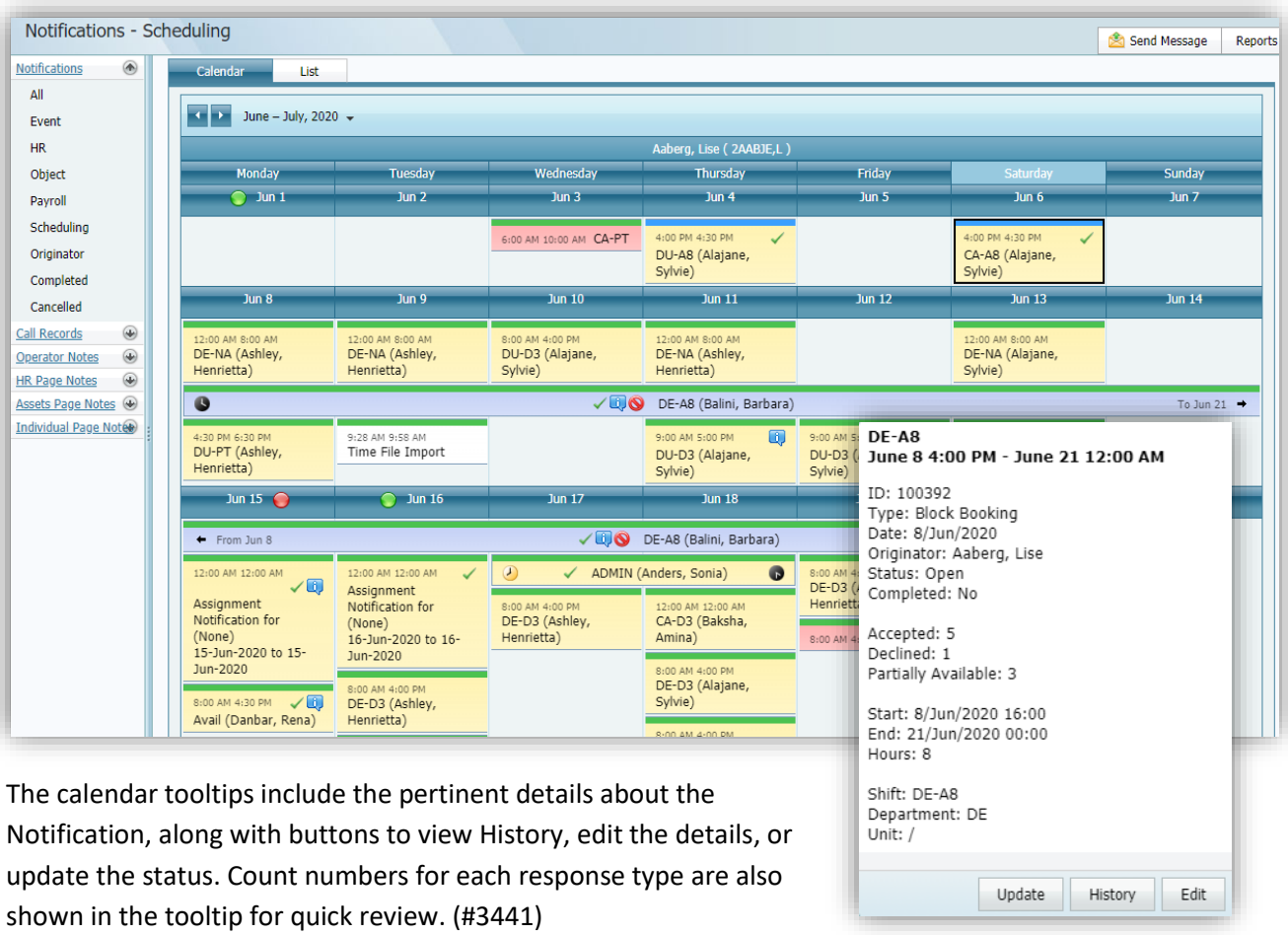
Communications

There are substantial enhancements to the Communications hub, including direct access to tools and information, a user-friendly calendar view, colour-coded notification types, improved context menus (right-click menus), and tooltips.

*** New *** Calendar View in Notifications

The new Notifications calendar in the Communications hub provides a quick a way to review current and upcoming Notifications. Notification status is indicated by the colour of the bar above the start/end time – Green is Open, Yellow is Information/Pending, Blue is Accepted, and Red is Declined.

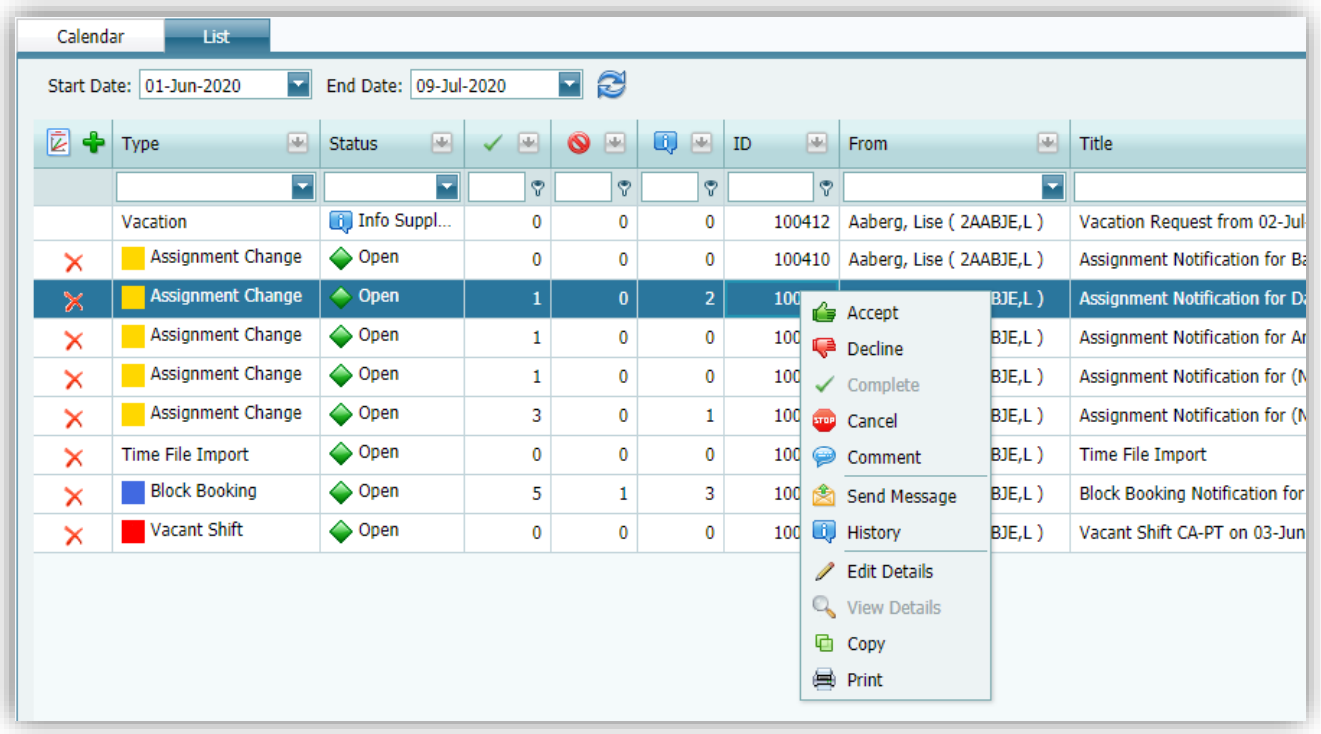
Responses are also indicated right on the page – a green checkmark (✓) indicates one or more Accept responses, a red circle with a line (⊘) indicates one or more Decline responses, and a blue information box (ℹ) indicates one or more Partial or Information Supplied responses.



The calendar tooltips include the pertinent details about the Notification, along with buttons to view History, edit the details, or update the status. Count numbers for each response type are also shown in the tooltip for quick review. (#3441)

Notifications List

Notification Lists are quicker to respond to a right-click and now include the *current count of each response type* along with the selected colour for each Notification type. (#3342)



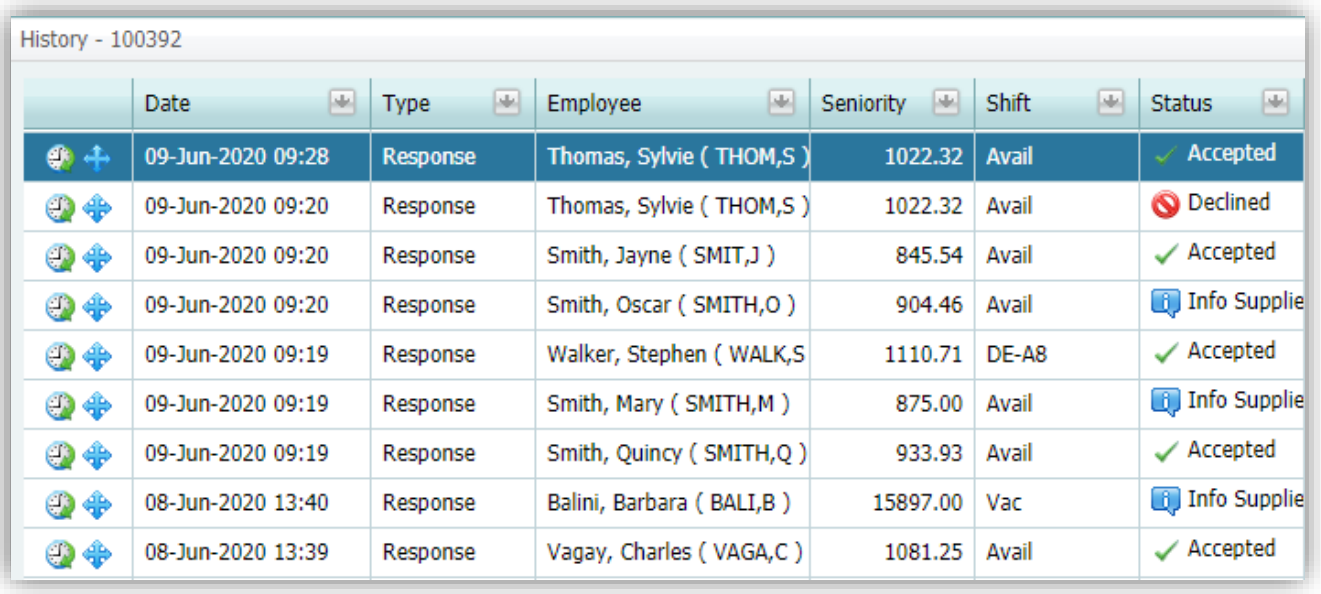
For quick clean-up, the Status and Complete columns in the Notifications List are both enabled for batch edit. To ensure Notifications are handled before being set to Completed, they must first be saved as Accepted, Declined, or Cancelled. (#3489)

*** New ** Shift Handle & Assignment Substitution Quick Links

For quick assignment changes, the History grids of Scheduling Notifications now include links to *directly shift handle or perform assignment substitution* on the selected employee. (#3240)

** *New* ** Employee Shift & Seniority in Notification History

Assigning the most senior employee to a shift is even easier now that the History grids of Scheduling Notifications include the *employee's seniority and current shift*. (#3488)



History - 100392

	Date	Type	Employee	Seniority	Shift	Status
	09-Jun-2020 09:28	Response	Thomas, Sylvie (THOM,S)	1022.32	Avail	Accepted
	09-Jun-2020 09:20	Response	Thomas, Sylvie (THOM,S)	1022.32	Avail	Declined
	09-Jun-2020 09:20	Response	Smith, Jayne (SMIT,J)	845.54	Avail	Accepted
	09-Jun-2020 09:20	Response	Smith, Oscar (SMITH,O)	904.46	Avail	Info Supplie
	09-Jun-2020 09:19	Response	Walker, Stephen (WALK,S	1110.71	DE-A8	Accepted
	09-Jun-2020 09:19	Response	Smith, Mary (SMITH,M)	875.00	Avail	Info Supplie
	09-Jun-2020 09:19	Response	Smith, Quincy (SMITH,Q)	933.93	Avail	Accepted
	08-Jun-2020 13:40	Response	Balini, Barbara (BALI,B)	15897.00	Vac	Info Supplie
	08-Jun-2020 13:39	Response	Vagay, Charles (VAGA,C)	1081.25	Avail	Accepted

Recipients Handling

When updating the Recipients list in a new Notification, there is no longer an error when adding or removing recipient(s). (#3483)

The Operator Notes page now refreshes the recipient information when a new note is saved. (#2969)

Messaging

A race condition, when two employees respond to a message simultaneously, will no longer result in one receiving *an Item has been changed by someone else...* message, the system will save both responses. (#3082)

Self Serve

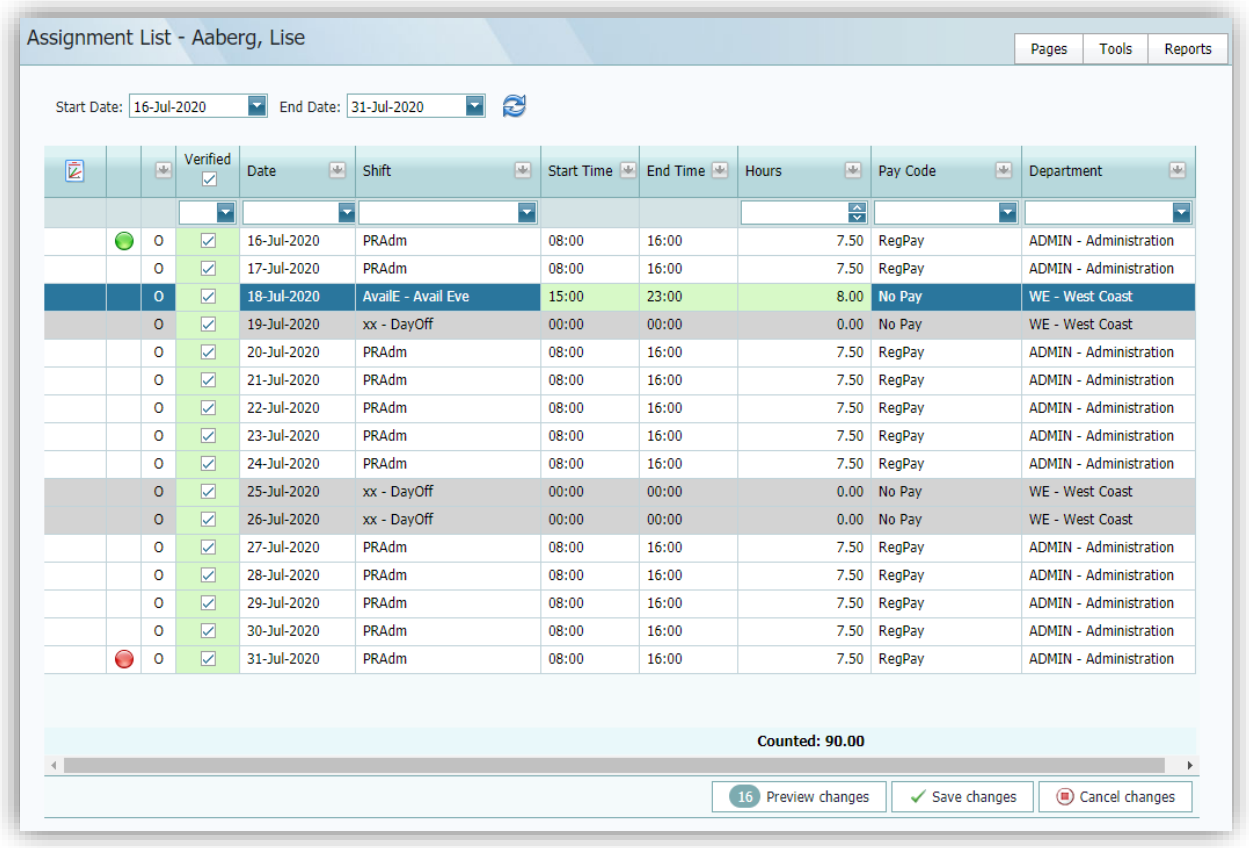
Department Monthly

A new Scheduling Setting, *PersDeptMonthlyByAssnRules* allows employees with access to the Self Serve Department Monthly page to view published schedules for the departments included in their Assignment Rules table. (#3354)

** New ** Simplified Assignment List Views

Employees can now view their assignments in a more *simplified format*. The Assignment List page and the Assignment Edit dialog for the Monthly and Annual pages will display fewer fields when the user's Edit Assignment Details security right is set to None.

Employees can also be given the ability to verify their assignments and change their Start Time and Stop Time by setting Verify Assignments right along with the page right (Assignment List, Monthly and/or Annual) to Modify. Note that the individual Shift's *Modify By Employee* setting still controls any changes to the assignment details. (#3521)

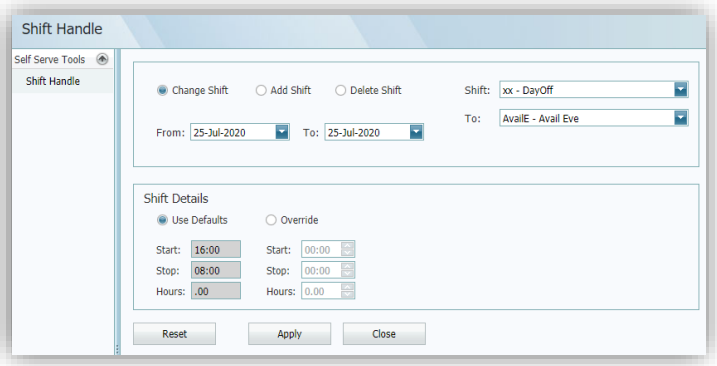


		Verified	Date	Shift	Start Time	End Time	Hours	Pay Code	Department
	O	☑	16-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	17-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	18-Jul-2020	AvailE - Avail Eve	15:00	23:00	8.00	No Pay	WE - West Coast
	O	☑	19-Jul-2020	xx - DayOff	00:00	00:00	0.00	No Pay	WE - West Coast
	O	☑	20-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	21-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	22-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	23-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	24-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	25-Jul-2020	xx - DayOff	00:00	00:00	0.00	No Pay	WE - West Coast
	O	☑	26-Jul-2020	xx - DayOff	00:00	00:00	0.00	No Pay	WE - West Coast
	O	☑	27-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	28-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	29-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	30-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration
	O	☑	31-Jul-2020	PRAdm	08:00	16:00	7.50	RegPay	ADMIN - Administration

Note: Self Serve security rights may need to be adjusted after this update – the page right now controls access to add/edit/delete options on each page, rather than the more global Edit Assignment Details right. Tip Sheets are available for more details on configuration options.

Self Serve Shift Handle

Employees with a View or No Access right to *Edit Assignment Details* will no longer see the extended assignment fields in the Shift Handle dialog, but they will still be able to Shift Handle their assignments (as long as they have access to Shift Handling). (#3521)



The option to enter notes during Shift Handling will only be available when the user's View Assignment Notes security right is Modify or higher. (#3521)

For employees with the ability to modify assignment notes, the Shift Handle Note text box will be disabled after Apply is clicked and will be enabled again when one or more criteria has been entered. (#3507)

Human Resources

New Employee Skill Set Details

A new Details field is available in the Employee Skill Sets table. It can be used to store information related to a specific employee's Skill Set, e.g., course information, license numbers, or prerequisites. (#3387)

HR Notifications

The Notifications page in HR has also been updated to show Seniority and Shift along with links to Shift Handle and Assignment Substitution in the History view for all Scheduling Notifications. (#3240 & #3488)

HR Page Notes Access

Clicking the Page Notes icon on HR Pages will automatically default to Add mode in the Page Notes area of the Communications hub. (#2623)

Birthday List

The Birthday List report will no longer include the employee's birth year when Age is not included. (#2517)

Add Employee

When creating a new employee, the Copy Employee list will be limited to employees in the current operator's Employee Groups. (#3409)

The user will be prompted for confirmation when creating an employee with a future effective date. (#3267)

When an invalid Social Insurance Number is entered while creating an employee, an error message will be displayed, but all fields will retain their previous value. (#2996)

Employee Import

The Employee Import will correctly handle Display Names with a space and will store updated values correctly. (#3162 & #3063)

Skill Set Import

The Skill Set Import tool can now be used to add and edit Employee Skill Sets in a batch edit format. (#2975)

User-defined Pages

Several minor updates were made to the user-defined pages in HR to ensure data is displayed, updated, and deleted seamlessly. (#3219, #3536, #3407, #3298, & #3298)

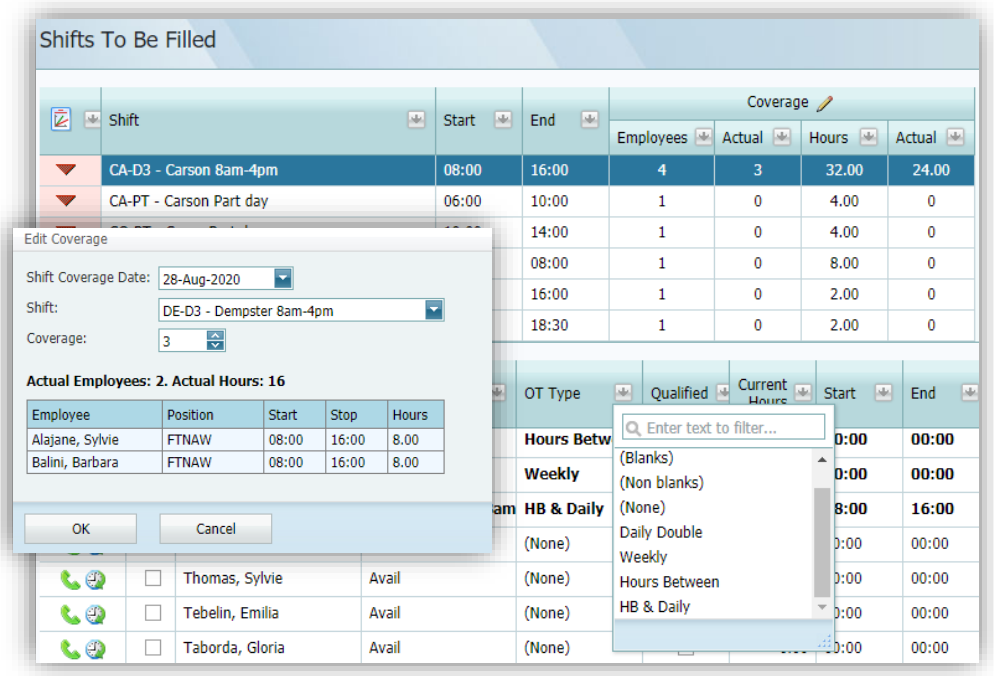
Scheduling

** *New* ** Shifts To Be Filled

The Shifts grid in the Shifts To Be Filled page now includes the ability to edit the Shift coverage on the fly. To edit the coverage of any shift, click the pencil ( ) to the right of the Coverage title or right-click any shift.

The Edit Coverage dialog will even display a list of employees currently scheduled to work that shift on the selected date. (#3237)

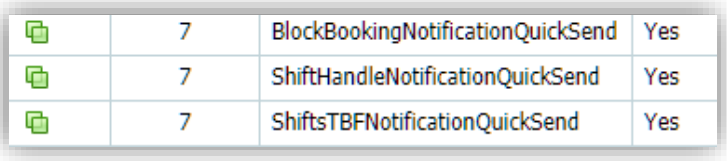
The Shift Master has also been updated to show shifts that are vacant when *either the hours or the employees are short*. (#3222)



Working with Overtime rules is also easier now that the Available Employees grid includes the *OT Type*. The new column can be sorted or filtered as necessary (#3455).

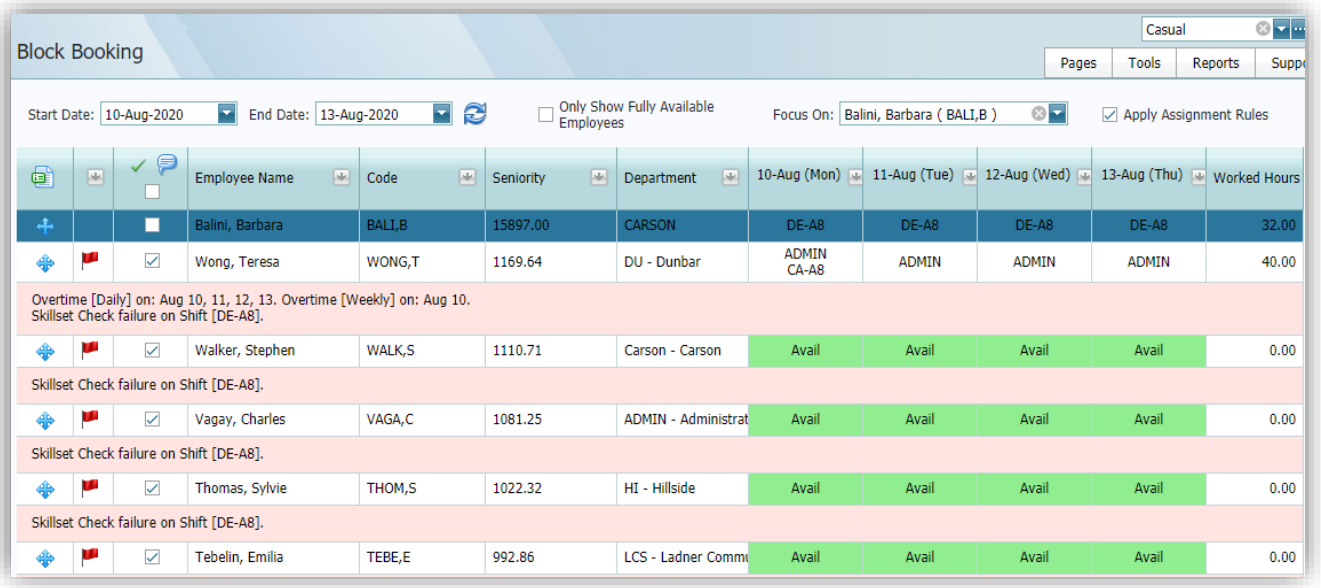
** *New* ** Notification Quick Send Options

With message details now being stored in Call Records, several sites have asked for a quicker way to Notify Employees from the Shifts To Be Filled page, Block Booking page, and/or Shift Handling tool. To accommodate this, new SS Settings have been added that will enable a Quick Send process that bypasses the Edit Notification dialog and goes directly to the Send Message dialog.

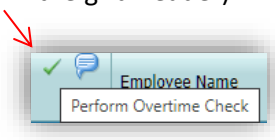


New Block Booking Assignment Check

To assist schedulers when managing vacancies or time-off requests for a block of dates, the Block Booking has been updated with new options to check for Overtime & Skill Set deficiencies as well as filter employees by Assignment Rules.



The new *Assignment Check* option in the Block Booking page (green check mark in the grid header) allows schedulers to proactively identify employees that will trigger Overtime before notifying them of a vacancy. It's also a quick way to review potential Overtime issues for a group of employees.



Running the Assignment Check with a Focus Employee checks the selected employees against the Focus Employee's assignments and highlights potential concerns. This can be further enhanced by checking the Apply Assignment Rules checkbox to *filter out* employees not allowed to work the Focus Employee's assignments.

When the Assignment Check is run without a Focus Employee, it will simply check each selected employee's assignments for the date range and highlight issues with their current schedule. *Total Worked Hours* for the date range is also indicated at the end of each employee row. (#3440)

The Focus Employee list has also been modified to show all employees in the scheduler's Employee Groups so that Filters can be applied to the employees in the grid (e.g., set Focus to a Full-time employee who is requesting time off, and set the page Filter to Casuals to quickly identify potential candidates.) (#3413)

Monthly Calendar & Employee Monthly Calendar

The Monthly pages now use the *MonthlyStartDay* in Company Settings for the calendar's first day of the week. (#3411)

Viewing a month when the Working Date is the last day of the previous month will now correctly display the entire month's assignments. (#3474)

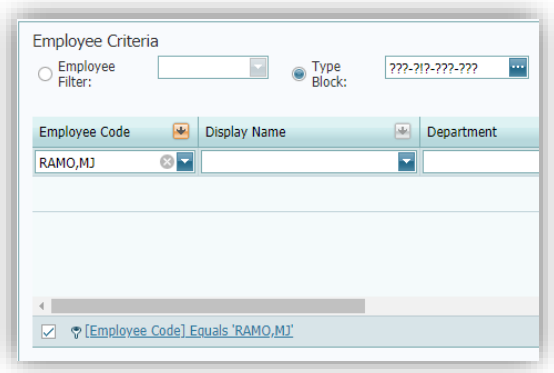
Assignments with a numeric Assignment Type will also be displayed correctly. (#3210)

New Tools | Time Swipe Import

The Time Swipe Import can now be configured to import swipes without In/Out indicators. The swipes will be compared against existing assignments and matched accordingly. This will assist sites wishing to use touchless Time Clocks. (#3524)

Tools | Shift Handle

When working with an Inactive employee, opening the Shift Handle tool will display a message that the working employee is no longer in the list and the employee criteria grid will be blank, but the employee will be pre-set in the grid filter. To quickly select the Inactive employee, simply select the Employee Filter option. (#3382)



The Assignment Note textbox is now disabled once a Shift Handle has been completed. It will be re-enabled when any of the criteria is changed. (#2569)

Tools | Assignment Substitution

Changes to Pay Codes during the substitution process will be applied as indicated in the Pay Codes grid. (#3487)

Tools | Freeze Schedules

The default Type Block filter in the Freeze Schedules tool will be set to include all employees to ensure recently terminated or inactive employees are included in the process. (#3402)

Tools | Stat Not Worked

The Stat Not Worked calculation can now be set to check for up to 999 worked assignments up to 999 days prior to the holiday. (#3552)

The process will also no longer error when replacing worked assignments for employees that already have a Stat Not Worked assignment on the holiday. (#3537)

Tools | Payroll Export

The default Type Block filter in the Payroll Export will be set to include all employees to ensure recently terminated or inactive employees are included in the process. (#3402)

Tools | Assignment Export

The default Type Block filter in the Assignment Export will be set to include all employees to ensure recently terminated or inactive employees are included in the process. (#3402)

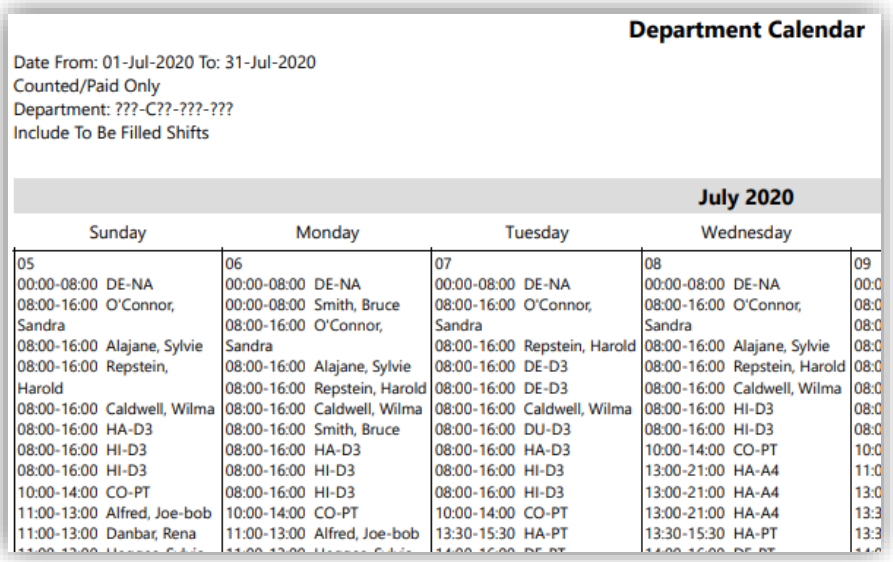
Tools | Global Shift Coverage

Shift occurrences will be saved correctly when created using the Global Shift Coverage tool. (#3420)

New Reports | Department Calendar – Consolidation & Vacancies

Multiple departments can now be printed in a consolidated calendar format. Use the Department Type Block to filter and group departments. (#3478)

To assist schedulers with departmental vacancy tracking, the Department Calendar can also be printed with Vacant shifts. (#3463)



Department Calendar

Date From: 01-Jul-2020 To: 31-Jul-2020
Counted/Paid Only
Department: ???-C??-???-???
Include To Be Filled Shifts

July 2020

Sunday	Monday	Tuesday	Wednesday	
05	06	07	08	09
00:00-08:00 DE-NA	00:00-08:00 DE-NA	00:00-08:00 DE-NA	00:00-08:00 DE-NA	00:0
08:00-16:00 O'Connor, Sandra	00:00-08:00 Smith, Bruce	08:00-16:00 O'Connor, Sandra	08:00-16:00 O'Connor, Sandra	08:0
08:00-16:00 Alajane, Sylvie	08:00-16:00 O'Connor, Sandra	08:00-16:00 Repstein, Harold	08:00-16:00 Alajane, Sylvie	08:0
08:00-16:00 Repstein, Harold	08:00-16:00 Alajane, Sylvie	08:00-16:00 DE-D3	08:00-16:00 Repstein, Harold	08:0
08:00-16:00 Caldwell, Wilma	08:00-16:00 Repstein, Harold	08:00-16:00 DE-D3	08:00-16:00 Caldwell, Wilma	08:0
08:00-16:00 HA-D3	08:00-16:00 Caldwell, Wilma	08:00-16:00 Caldwell, Wilma	08:00-16:00 HI-D3	08:0
08:00-16:00 HI-D3	08:00-16:00 Smith, Bruce	08:00-16:00 DU-D3	08:00-16:00 HI-D3	08:0
08:00-16:00 HI-D3	08:00-16:00 HA-D3	08:00-16:00 HA-D3	10:00-14:00 CO-PT	10:0
10:00-14:00 CO-PT	08:00-16:00 HI-D3	08:00-16:00 HI-D3	13:00-21:00 HA-A4	11:0
11:00-13:00 Alfred, Joe-bob	10:00-14:00 CO-PT	10:00-14:00 CO-PT	13:00-21:00 HA-A4	13:0
11:00-13:00 Danbar, Rena	11:00-13:00 Alfred, Joe-bob	13:30-15:30 HA-PT	13:00-21:00 HA-A4	13:3
			13:30-15:30 HA-PT	13:3

Reports | Assignment Sheets

Employee Assignments for up to 31 days can now be printed on one page when a legal format is used. (#3464)

Reports | Assignment Calendar

The Assignment Calendar report no longer times out when creating the report for a single employee. (#3573)

Reports | Assignment List

To assist schedulers and managers when checking for employee verification, assignments can now be filtered on the *Verified* flag. (#3404)

This report now counts Transferred hours *after* they have been exported to Payroll. (#3512)

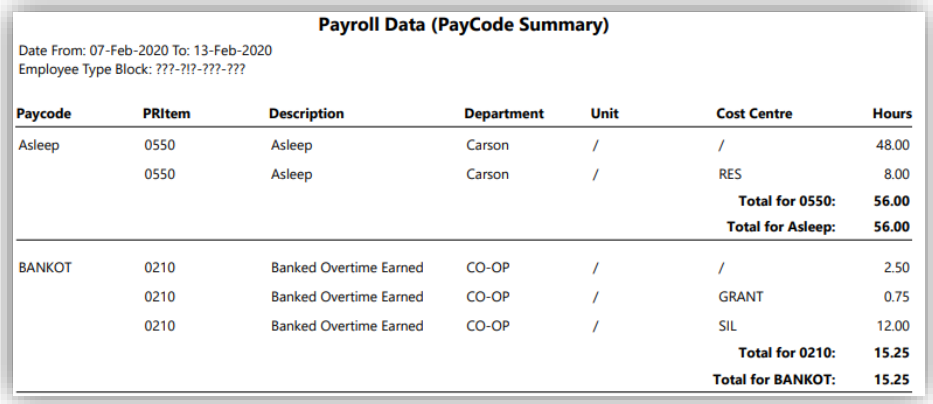
Reports | Availability

The Availability report will automatically print a separate row for each Employee, Shift, Start Time, End Time and Pay Code combination. This is especially useful for sites with multiple Available shifts. (#3478)

Reports | Payroll Data

The Pay Code Summary report now includes the assignment's *Payroll Item* code in the report. (#3447)

Assignments with a blank Unit will also be included in the report. (#3195)



Payroll Data (PayCode Summary)

Date From: 07-Feb-2020 To: 13-Feb-2020
Employee Type Block: ???-?!?-???-???

Paycode	PRItem	Description	Department	Unit	Cost Centre	Hours
Asleep	0550	Asleep	Carson	/	/	48.00
	0550	Asleep	Carson	/	RES	8.00
					Total for 0550:	**56.00**
					Total for Asleep:	**56.00**
BANKOT	0210	Banked Overtime Earned	CO-OP	/	/	2.50
	0210	Banked Overtime Earned	CO-OP	/	GRANT	0.75
	0210	Banked Overtime Earned	CO-OP	/	SIL	12.00
					Total for 0210:	**15.25**
					Total for BANKOT:	**15.25**

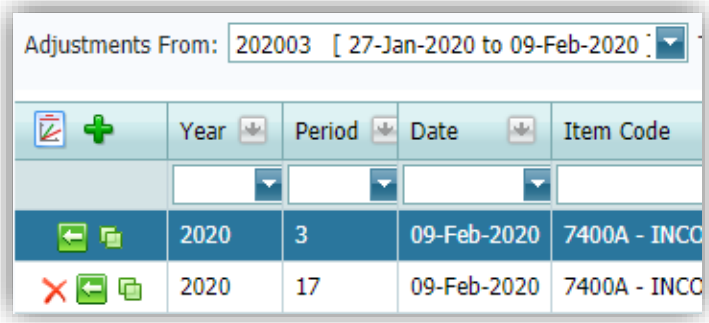
Setup | Shifts

The Shift setting for *Show on Shifts TBF* has a new option to show a shift as under-filled when either the Hours or Employees are short. (#3222)

Payroll

New Reversing Adjustments

Prior and current period adjustments can be reversed using the new Reverse button ( ). Reversals of prior period Adjustments will be created in the current pay period with the original date. Both current and future period adjustments can also be deleted when only INPD, AMPD pool values are non-zero. (#3380)



An employee can now have two adjustments for the same Item, Department, Unit, Position, Cost Centre, and EI as long as they were not created for the same Calculate Period runs. (#3332)

Transaction Registers

Dropdown lists in the both the Transaction Register and the Employee Transaction Register will now accept multiple characters before the list is filtered. (#3383)

Employee Amounts

Amounts with a non-zero POOL value will no longer be available for deletion. (#3351)

New Payroll Type Block Settings

New PR Settings have been added for sites that use the PR Type Block to filter reports and tools in Payroll. Setting the *UsePRTypeBlockDefault* to Yes will automatically default the Employee Criteria selection in tools and reports to the PR Type Block, and the default Type Block value can be adjusted by changing the

DefaultPRTypeBlock setting. Use caution when changing the Default PR Type Block to ensure all appropriate employees are included in the process. (#3444)

*** New **** Tools | HSCIS Extract

Several new fields have been added to the HSCIS file specifications and these new fields are included in both the HSCIS reports and the extract file. (#3545)

Tools | Apply HR Defaults

A new option in the Apply HR Defaults tool gives Payroll users the option of creating duplicate transactions when changes to an employee's defaults result in merged Amounts. When the checkbox is unchecked, duplicate transactions will be deleted. (#3465)

Tools | PIER Check

Employees with a CPP Exempt date will now be flagged as exempt in the tool and excluded from all CPP calculations. (#3525)

Tools | Email Pay Slips

The Copy watermark will only be included the second time a pay slip is emailed to an employee. (#3551)

Tools | Export ROE tool

The Export ROE process will now report the employee's earnings when there are two or more of the same items in the employee's Amounts. (#3377)

The process will also avoid file naming errors by removing special characters from the username prior to creating the ROE submission file name. (#3338)

Tools | HBT Extract

The LTD Coverage flag (LTDCvg) will be set correctly during the extract. (#3482)

Tools | Report Writer

Reports will no longer error when an employee's EI class is not set. (#3422)

Reports

All employee-based Payroll reports will sort by Employee Name (rather than code) when the *ReportSortByName* Payroll setting is True. (#3345)

Employee-based reports will also print the PR Type Block in the criteria when it has been selected. (#3509)

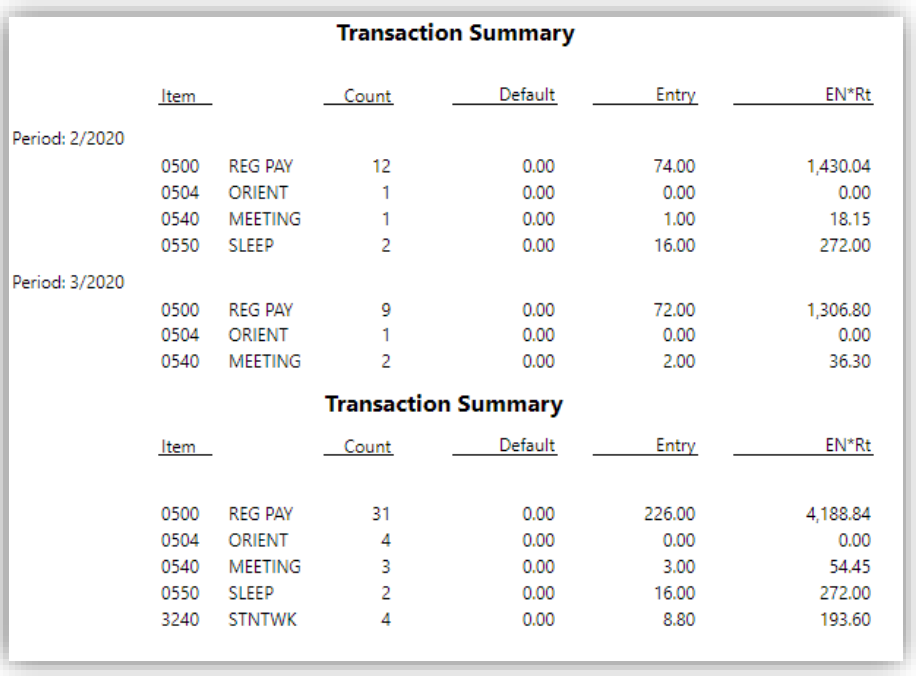
Reports printed for an Item Type Block filter that includes inactive items will now include these items when there is associated data; however, the inactive items will not be included in the Item criteria list. (#3470)

Reports | Employee Amounts

Employee Amounts that have been put on Hold will be printed with a Y in the Hold column of the report. (#3433)

Reports | Employee Transactions

A Transaction Summary is now included in all versions of the Employee Transaction report. The new summary will print grand totals for each Item. When the report is printed for a multiple pay periods, the Transaction Summary for each pay period will also include period labels with the pay period totals. (#3468 & #3421)



Transaction Summary

	Item		Count	Default	Entry	EN*Rt
Period: 2/2020						
	0500	REG PAY	12	0.00	74.00	1,430.04
	0504	ORIENT	1	0.00	0.00	0.00
	0540	MEETING	1	0.00	1.00	18.15
	0550	SLEEP	2	0.00	16.00	272.00
Period: 3/2020						
	0500	REG PAY	9	0.00	72.00	1,306.80
	0504	ORIENT	1	0.00	0.00	0.00
	0540	MEETING	2	0.00	2.00	36.30

Transaction Summary

Item		Count	Default	Entry	EN*Rt
0500	REG PAY	31	0.00	226.00	4,188.84
0504	ORIENT	4	0.00	0.00	0.00
0540	MEETING	3	0.00	3.00	54.45
0550	SLEEP	2	0.00	16.00	272.00
3240	STNTWK	4	0.00	8.80	193.60