



# ComVida Application Suite 5.1.14

## What's New

*July 2021*

## Contents

Overview.....	5
Leave Management.....	6
** New ** Scheduler’s Leave Management .....	6
** New ** Self Serve Leave Management .....	7
** New ** Leave Management Types.....	8
** New ** Leave Balances Report.....	8
Background Jobs.....	8
** New ** Payroll Import Job .....	9
** New ** Employee Import Job.....	9
** New ** Employee Export Job .....	10
** New ** Historical Activity.....	10
** New ** File Upload Utility .....	10
Communications.....	10
** New ** Message Formatting Options .....	10
New Substitution Codes .....	10
Notification Type Default Description .....	11
Follow-up Messages .....	11
Notification Access .....	11
Notification History .....	11
Scheduling .....	12
** New ** Leave Management.....	12
** New ** Leave Balances Report.....	13
** New ** Daily Schedule Details .....	13
** New ** Shift Frequencies .....	13
Schedules Pages .....	13
Shifts To Be Filled .....	13
Monthly & Department Monthly Calendars .....	13
Employee Pages.....	14
Scheduling Tools.....	14

Shift Handle .....	14
Time File Import .....	14
Freeze\Unfreeze .....	15
Payroll Export .....	15
Scheduling Reports.....	15
Payroll.....	15
Items.....	15
<b>**New**</b> No Duplicate Amounts Option .....	15
Formula Setup .....	15
Filtering.....	15
Required Items Report .....	15
Transactions & Adjustments .....	16
Payroll Tools .....	16
Pay Slip & Cheque Management .....	16
T4 & T4A Slip Handling .....	16
PIER Check .....	16
Import Transactions .....	16
Export ROE.....	16
GL Extract.....	17
HSCIS Extract .....	17
Payroll Reports .....	17
Pay Period Register.....	17
Employee Transactions Report.....	17
Amounts Audit Report.....	17
Human Resources.....	17
Employee Import .....	17
<b>**New**</b> Operator Defaults.....	17
Badge & Employee Codes.....	18
Employee Export .....	18
Employee Skill Sets .....	18
Self Serve .....	19

<b>**New**</b> Leave Management.....	19
Monthly & Department Monthly Calendars .....	19
Main.....	20
Setup.....	20
<b>**New**</b> Leave Management Types.....	20
Notification Types Report.....	20
Security Groups Report .....	21

## Overview

This release focused on enhancing key processes, and introduced new Leave Management functionality along with a new set of Background Jobs for importing and exporting HR data on a regular basis.

Highlights include:

- All new [Leave Management Scheduling](#) and [Self Serve](#) pages to streamline both the creation and the management of employee leave requests.
- A new [Payroll Import Background Job](#) to simplify pay period processing by automatically applying banked hour and earning detail updates to HR.
- New Background Jobs to automate regular [Employee Imports](#) and [Exports](#), reducing manual intervention and report processing time.
- Additional options in the Employee Import tool to [preconfigure new employees as operators](#), reducing or even eliminating the need for manual setup.
- New [Scheduling Settings to include](#) or [suppress pay code details](#) in the Scheduling Daily, Monthly and Department Monthly pages.

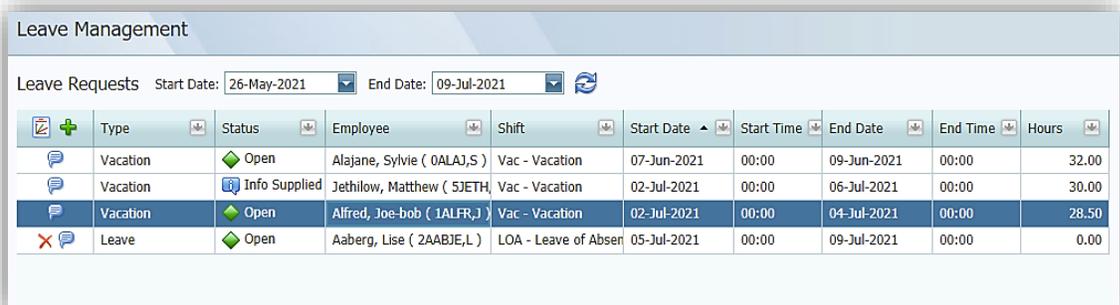
The details below provide a glimpse of the extensive improvements. User Guides, Course documents, and Tip Sheets will cover the changes and enhancements in more detail.

# Leave Management

This release of CVC51 includes new functionality to assist schedulers and employees when managing leave requests. These new pages bring together existing data and processes within HR and Scheduling to provide a quick and easy way to request, review and grant employee leaves.

## \*\* New \*\* Scheduler's Leave Management

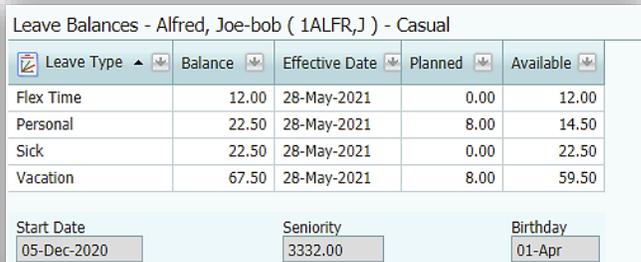
The new scheduler's Leave Management page is available under the Schedules menu in Scheduling.



Type	Status	Employee	Shift	Start Date	Start Time	End Date	End Time	Hours
Vacation	Open	Alajane, Sylvie ( 0ALAJ,S )	Vac - Vacation	07-Jun-2021	00:00	09-Jun-2021	00:00	32.00
Vacation	Info Supplied	Jethilow, Matthew ( 5JETH )	Vac - Vacation	02-Jul-2021	00:00	06-Jul-2021	00:00	30.00
Vacation	Open	Alfred, Joe-bob ( 1ALFR,J )	Vac - Vacation	02-Jul-2021	00:00	04-Jul-2021	00:00	28.50
Leave	Open	Aaberg, Lise ( 2AABJE,L )	LOA - Leave of Absen	05-Jul-2021	00:00	09-Jul-2021	00:00	0.00

The main table on the page is an editable list of Leave Request Notifications for a date range. The list can be filtered and sorted by any field, including start date of the request, date requested, or even seniority.

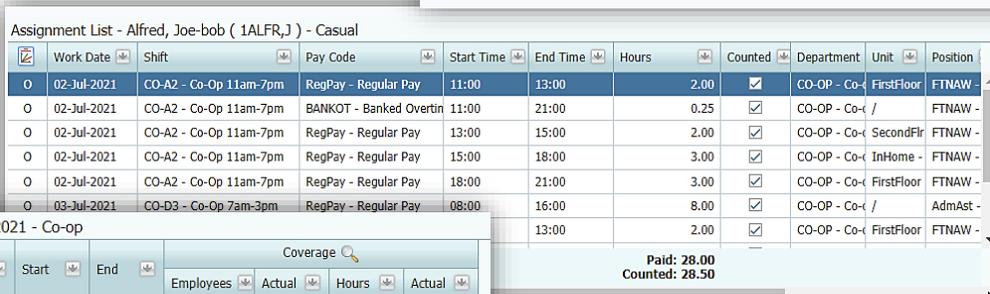
When a Leave Request is selected, the remaining tables are filled with details related to the employee and the dates requested. The Leave Balances table provides details of the employee's current leave bank values, along with the number of future days already planned and the balance available.



Leave Type	Balance	Effective Date	Planned	Available
Flex Time	12.00	28-May-2021	0.00	12.00
Personal	22.50	28-May-2021	8.00	14.50
Sick	22.50	28-May-2021	0.00	22.50
Vacation	67.50	28-May-2021	8.00	59.50

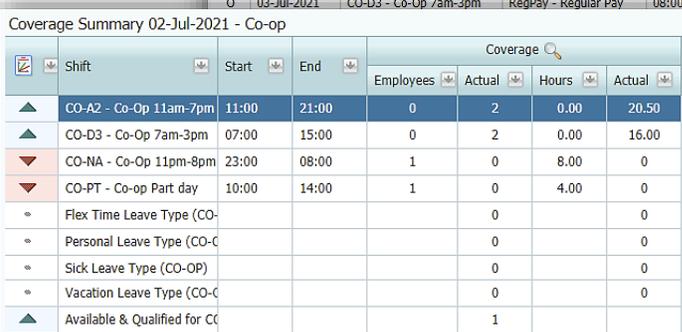
Start Date: 05-Dec-2020      Seniority: 3332.00      Birthday: 01-Apr

The Assignment List contains the employee's current



Work Date	Shift	Pay Code	Start Time	End Time	Hours	Counted	Department	Unit	Position
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	11:00	13:00	2.00	<input checked="" type="checkbox"/>	CO-OP - Co-	FirstFloor	FTNAW -
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	BANKOT - Banked Overtin	11:00	21:00	0.25	<input checked="" type="checkbox"/>	CO-OP - Co-	/	FTNAW -
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	13:00	15:00	2.00	<input checked="" type="checkbox"/>	CO-OP - Co-	SecondFlr	FTNAW -
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	15:00	18:00	3.00	<input checked="" type="checkbox"/>	CO-OP - Co-	InHome -	FTNAW -
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	18:00	21:00	3.00	<input checked="" type="checkbox"/>	CO-OP - Co-	FirstFloor	FTNAW -
03-Jul-2021	CO-D3 - Co-Op 7am-3pm	RegPay - Regular Pay	08:00	16:00	8.00	<input checked="" type="checkbox"/>	CO-OP - Co-	/	AdmAst -
			13:00		2.00	<input checked="" type="checkbox"/>	CO-OP - Co-	FirstFloor	FTNAW -

Paid: 28.00  
Counted: 28.50



Shift	Start	End	Employees	Actual	Hours	Actual
CO-A2 - Co-Op 11am-7pm	11:00	21:00	0	2	0.00	20.50
CO-D3 - Co-Op 7am-3pm	07:00	15:00	0	2	0.00	16.00
CO-NA - Co-Op 11pm-8pm	23:00	08:00	1	0	8.00	0
CO-PT - Co-op Part day	10:00	14:00	1	0	4.00	0
Flex Time Leave Type (CO-				0		0
Personal Leave Type (CO-C				0		0
Sick Leave Type (CO-OP)				0		0
Vacation Leave Type (CO-C				0		0
Available & Qualified for CO				1		

assignments for the date range, and the Coverage Summary provides an at-a-glance view of department coverage for the date selected in the Assignment List.

The page also includes context menus and buttons to quickly take action on the request, links to Shift Handle, Assignment Substitution and Block Booking are all available; Accessing the tools from this page also ensures the details of the request are automatically populated.

Using this page, schedulers and managers with the appropriate security rights can make informed decisions to grant or deny leave requests, notify the employee of the results and apply any assignment changes necessary with minimal effort. (#3836)

### \*\* New \*\* Self Serve Leave Management

The new Leave Management page in Self Serve, under the Assignments menu, provides employees with a simple method of requesting leaves as well as checking their current balances and the status of any previous requests. The page includes a Leave Balances table for a quick view of current bank balances, along with the number of days planned but not yet taken, and the remaining balance available.

Leave Management - Alfred, Joe-bob

Leave Balances: 01-Jan-2021 to 31-Dec-2021

Leave Type				Balance	Effective Date	Planned	Available
Flex Time	0	0	0	12.00	28-May-2021	0.00	12.00
Personal	0	1	0	22.50	28-May-2021	8.00	14.50
Sick	1	0	0	22.50	28-May-2021	0.00	22.50
Vacation	1	0	0	67.50	28-May-2021	8.00	59.50

Requests (Notifications) for the selected Leave Type are displayed in a grid that allows for quick updates (of Open Notifications only). The Add button on the grid allows an employee to quickly generate a new request for any of their Leave Types, and the assignments for the requested date range are displayed in a third grid at the bottom of the page, making it easy to see how many hours they are requesting. (#3835)

Vacation Requests

	Status	Start Date	Start Time	End Date	End Time	Hours	ID	Completed	Date	Title
	Open	02-Jul-2021	00:00	04-Jul-2021	00:00	28.50	597	<input type="checkbox"/>	02-Jun-2021	Vacation

Assignments

	Work Date	Shift	Start Time	End Time	Hours	Pay Code	Department	
O	02-Jul-2021	CO-A2 - Co-Op 11am-7pm	11:00	13:00	2.00	RegPay - Regular Pay	CO-OP - Co-op	
O	02-Jul-2021	CO-A2 - Co-Op 11am-7pm	11:00	21:00	0.25	BANKOT - Banked Overtime	CO-OP - Co-op	
O	02-Jul-2021	CO-A2 - Co-Op 11am-7pm	13:00	15:00	2.00	RegPay - Regular Pay	CO-OP - Co-op	
O	02-Jul-2021	CO-A2 - Co-Op 11am-7pm	15:00	18:00	3.00	RegPay - Regular Pay	CO-OP - Co-op	
O	02-Jul-2021	CO-A2 - Co-Op 11am-7pm	18:00	21:00	3.00	RegPay - Regular Pay	CO-OP - Co-op	
Counted: 28.50								

## \*\* New \*\* Leave Management Types

The Leave Management Types table (under Setup in the Home page menu) contains the links used by the Leave Management pages to pull together the information from HR and Scheduling. (#3837 & #3923)

Leave Management Types							
Leave Type	Description	Balance Field	Notification Type	Pay Code	Assignment Type	Default Shift	
Flex Time	Banked Flex Time Leave Request	T_EarnedTime	Scheduling	BKFLTK - Banked Fle	(Any)	Flex - Flex Leave Tak	
Personal	Personal Leave Requests	T_SPLVE	Leave	(Any)	Leave	LOA - Leave of Absen	
Sick	Sick Leave Requests	T_Sick	Sick	Sick - Sick Leave	Sick	Sick	
Vacation	Vacation Requests	T-Vacation	Vacation	VAC - Vacation Pay	(Any)	Vac - Vacation	

## \*\* New \*\* Leave Balances Report

The new Leave Balances report in Scheduling provides employee details, their current bank balances, and the total planned hours for each selected Leave Type. The report can be printed in employee order or by seniority. (#3912)

Leave Balances by Seniority									
Leave Management Dates: 01-Jan-2021 to 31-Dec-2021									
Employee Type Block: ???-?!-?!?-???									
Leave Type: Sick									
Employee	Seniority	Type	Start Date	Department	Position	Effective Date	Current Balance	Planned Hours	Available Hours
Alajane, Sylvie ( OALAJ,S )	17454.42	Sick	15-Sep-1998	DU	FTSWA	24-Jan-2021	963.85	0	963.85
Balini, Barbara ( BALI,B )	15834.75	Sick	13-May-1992	CARSON	FTNAW	24-Jan-2021	770.81	0	770.81
Aaberg, Lise ( 2AABJE,L )	13065.30	Sick	07-Sep-1992	WE	AccAsc	24-Jan-2021	108.29	6.00	102.29
Bailey, William ( BAILE,W )	9791.32	Sick	05-Dec-2011	DE	APTSW	24-Jan-2021	201.26	0	201.26

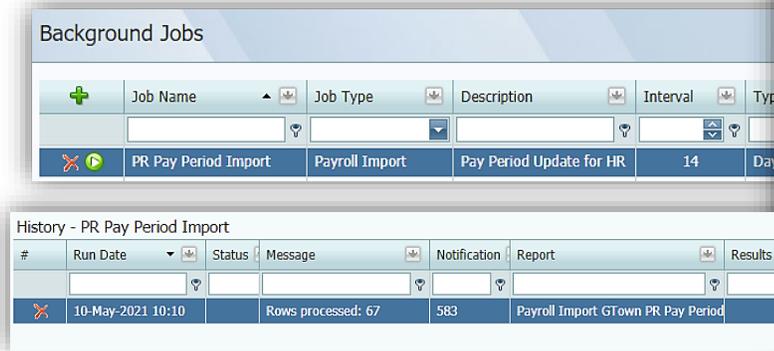
## Background Jobs

Background Jobs were introduced over two years ago as a way to reduce or even eliminate the need for manual processing of routine tasks. There are Jobs to import Time Files, alert employees and/or supervisors of expiring Skill Sets, report on upcoming anniversary dates, process pending HR data changes, and even check licensing levels.

The release of 5.1.14 includes three new Jobs that will simplify the routine tasks of updating Payroll data in HR, importing employees from a third-party application, and exporting employee data on a regular basis for further review. Each of these Jobs will email the results of the process to specific staff, and the results will be maintained in a new History table, providing direct access at any time.

## \*\* New \*\* Payroll Import Job

The new Payroll Import Job will automatically update banked hours, historical earnings and other HR-related data from ComVida Payroll. The Job can be configured to run at



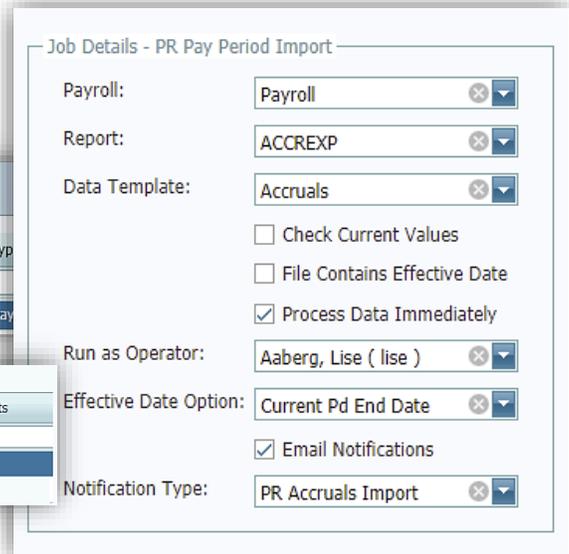
**Background Jobs**

Job Name	Job Type	Description	Interval	Type
PR Pay Period Import	Payroll Import	Pay Period Update for HR	14	Day

**History - PR Pay Period Import**

#	Run Date	Status	Message	Notification	Report	Results
	10-May-2021 10:10		Rows processed: 67	583	Payroll Import GTown PR Pay Period	



**Job Details - PR Pay Period Import**

Payroll:

Report:

Data Template:

Check Current Values

File Contains Effective Date

Process Data Immediately

Run as Operator:

Effective Date Option:

Email Notifications

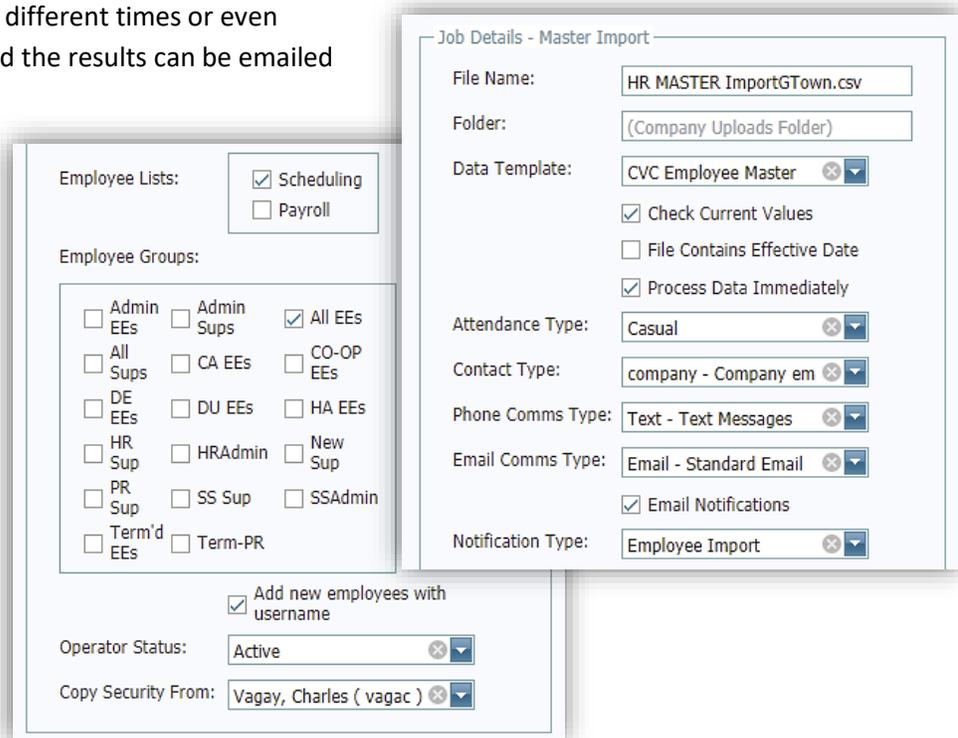
Notification Type:

the beginning or end of each pay period to ensure HR stays up-to-date with the latest payroll information. (#3847)

## \*\* New \*\* Employee Import Job

The HR Employee Import tool has been automated into a new Job that will read data from a text (csv) file and update HR fields. Multiple Jobs can be set up for importing discrete data at different times or even from different sources, and the results can be emailed to the appropriate staff members for review. (#3845)

The new Employee Import Job also includes options for configuring new employees as operators, with a default Operator ID and a uniquely coded temporary password that must be reset at first login. (#3872)



**Employee Lists:**

Scheduling

Payroll

**Employee Groups:**

Admin EEs  Admin Sups  All EEs

All Sups  CA EEs  CO-OP EEs

DE EEs  DU EEs  HA EEs

HR Sup  HRAdmin  New Sup

PR Sup  SS Sup  SSAdmin

Term'd EEs  Term-PR

Add new employees with username

Operator Status:

Copy Security From:

**Job Details - Master Import**

File Name:

Folder:

Data Template:

Check Current Values

File Contains Effective Date

Process Data Immediately

Attendance Type:

Contact Type:

Phone Comms Type:

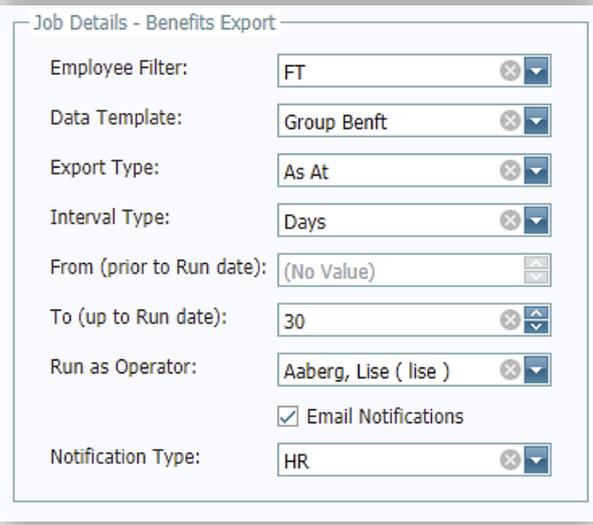
Email Comms Type:

Email Notifications

Notification Type:

### \*\* New \*\* Employee Export Job

Using the new Employee Export Job along with a Data Template, current values, values as of a specific date, or historical employee data can be exported to a text file on a regular basis. The results will be emailed to appropriate staff for further analysis, reporting, or import into a third-party application. (#3846)



### \*\* New \*\* Historical Activity

Tracking a Background Job's activity will be much easier with the new History table. It will store the results of each Background Job, including links to the resulting notifications, reports and/or exported files. It also provides a record of the Job having run with no results or a flag in the Status if there are errors. (#3842)

Instead of generating a Notification (and optionally, an associated email), when a Job runs and there is nothing to report, those results will be recorded in the new History table for future reference. (#3781)

### \*\* New \*\* File Upload Utility

A new File Upload utility will be available in this release. This new utility will allow sites on a hosted server to use the import Background Jobs, including the both Time File Import and Employee Import Jobs. Please contact [Helpdesk](#) for more details. (#3848)

## Communications

### \*\* New \*\* Message Formatting Options

Notifications have become an integral part of many of the functions in ComVida EMS, and this release includes updates and new features to make them even easier to use.

#### NEW SUBSTITUTION CODES

Two new substitution codes are included in 5.1.14. These codes can be included in the new Default Description of a Scheduling notification type:

[@SHIFTLIST@](#) - lists the Focus Employee's assignments (date & time) within the date range. (#3633)

[@SHIFTDESCRIPTION@](#) - includes the Notification Shift's Description. (#3213)

## NOTIFICATION TYPE DEFAULT DESCRIPTION

Notification Types have been enhanced to include a separate Default Description. The Default Description will be included in the body of the text, voice and/or email message. (#3920 & #3921)

## Follow-up Messages

Follow-up messages are sent to all employees that responded to a shift vacancy with Accept or Partial, and still have an available shift that day. Some organizations prefer to set their worked shifts to available, so in these cases, the employee awarded the shift also received the follow-up message. This process has been modified so that the focus employee (e.g., the one being assigned to the shift) will no longer receive the follow-up message, even if they're still on an available shift. (#3924)

## Notification Access

To assist schedulers in managing notifications created by overnight staff, recipients with 'Full Access' will be able to Cancel or Complete the notification, even when the 'Complete By Recipient' and/or 'Recipient Can Change Status' options are unchecked. (#3813)

For notifications like a Leave Request, where the Originator is a Respond Only recipient type and the notification's 'Complete By Originator' is unchecked, the Originator will not be able to change the notification status once it is Pending, Accepted, Declined or Cancelled. So, for example, this will prevent employees from cancelling a Leave Request while it's being processed. (#3747)

When the Notifications page first opens, the 'List' tab will be the default format unless the 'Calendar' format was selected prior to closing the page. (#3849)

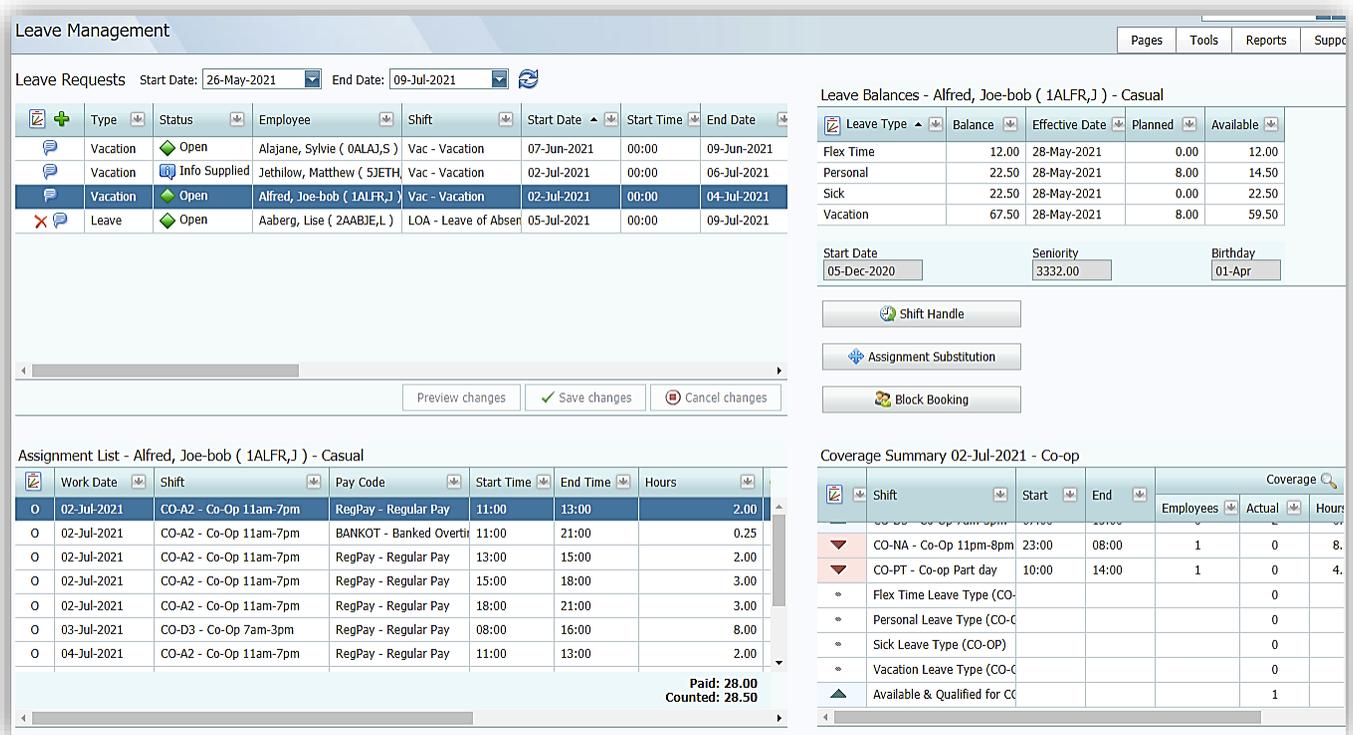
## Notification History

To assist scheduler response to a Notification regarding a shift change request, the Notification History will include an initial record of the creation. This will allow Shift Handle and Assignment Substitution activity to be performed directly from the Notification. (#3748)

# Scheduling

## \*\* New \*\* Leave Management

The new Leave Management page in Scheduling provides a quick and easy way to manage leave requests. The page includes a list of Leave Request Notifications for an editable date range that can be filtered and sorted by any field. Handle a last-minute sick request or quarterly vacation requests without referring to multiple pages or reports.



The screenshot displays the 'Leave Management' interface. At the top, there are filters for 'Leave Requests' with 'Start Date' set to 26-May-2021 and 'End Date' set to 09-Jul-2021. Below this is a table of leave requests:

Type	Status	Employee	Shift	Start Date	Start Time	End Date
Vacation	Open	Alajane, Sylvie ( 0ALAJ,S )	Vac - Vacation	07-Jun-2021	00:00	09-Jun-2021
Vacation	Info Supplied	Jethilow, Matthew ( 5JETH )	Vac - Vacation	02-Jul-2021	00:00	06-Jul-2021
Vacation	Open	Alfred, Joe-bob ( 1ALFR,J )	Vac - Vacation	02-Jul-2021	00:00	04-Jul-2021
Leave	Open	Aaberg, Lise ( 2AABJE,L )	LOA - Leave of Absen	05-Jul-2021	00:00	09-Jul-2021

Below the leave requests table are buttons for 'Preview changes', 'Save changes', and 'Cancel changes'. To the right, the 'Leave Balances - Alfred, Joe-bob ( 1ALFR,J ) - Casual' table shows:

Leave Type	Balance	Effective Date	Planned	Available
Flex Time	12.00	28-May-2021	0.00	12.00
Personal	22.50	28-May-2021	8.00	14.50
Sick	22.50	28-May-2021	0.00	22.50
Vacation	67.50	28-May-2021	8.00	59.50

Below the leave balances are fields for 'Start Date' (05-Dec-2020), 'Seniority' (3332.00), and 'Birthday' (01-Apr). There are also buttons for 'Shift Handle', 'Assignment Substitution', and 'Block Booking'. At the bottom left, the 'Assignment List - Alfred, Joe-bob ( 1ALFR,J ) - Casual' table shows:

Work Date	Shift	Pay Code	Start Time	End Time	Hours
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	11:00	13:00	2.00
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	BANKOT - Banked Overti	11:00	21:00	0.25
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	13:00	15:00	2.00
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	15:00	18:00	3.00
02-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	18:00	21:00	3.00
03-Jul-2021	CO-D3 - Co-Op 7am-3pm	RegPay - Regular Pay	08:00	16:00	8.00
04-Jul-2021	CO-A2 - Co-Op 11am-7pm	RegPay - Regular Pay	11:00	13:00	2.00

At the bottom right of the assignment list, it shows 'Paid: 28.00' and 'Counted: 28.50'. To the right of the assignment list is the 'Coverage Summary 02-Jul-2021 - Co-op' table:

Shift	Start	End	Employees	Actual	Hour
CO-NA - Co-Op 11pm-8pm	23:00	08:00	1	0	8.00
CO-PT - Co-op Part day	10:00	14:00	1	0	4.00
Flex Time Leave Type (CO-				0	
Personal Leave Type (CO-C				0	
Sick Leave Type (CO-OP)				0	
Vacation Leave Type (CO-C				0	
Available & Qualified for CC				1	

As each Leave Request is selected, the Leave Balances table on the right will display the employee's current HR balances and planned hours.

The employee's assignments for the requested date(s) are also displayed along with a Coverage Summary to quickly review the department's shifts and vacancies for each day. Clicking the Coverage Summary spyglass (🔍) will display the employees working each shift as well as the employees that have booked leave on that day. The Available & Qualified employee count provides a quick way to see how many qualified employees are currently available to work the shift.

Using this page, a new leave request can even be created and handled all at the same time, plus it's a great new way to manage leave requests, keep employees and apply assignment changes with minimal effort. (#3836)

## \*\* New \*\* Leave Balances Report

The new Leave Balances report is a great way to review employee details, current bank balances, and the total planned hours for any or all Leave Types. The report can also be printed in employee order or by seniority. (#3912)

Leave Balances by Seniority									
Leave Management Dates: 01-Jan-2021 to 31-Dec-2021									
Employee Type Block: ???-?!-?!?-???									
Leave Type: Sick									
Employee	Seniority	Type	Start Date	Department	Position	Effective Date	Current Balance	Planned Hours	Available Hours
Alajane, Sylvie ( 0ALAJ,S )	17454.42	Sick	15-Sep-1998	DU	FTSWA	24-Jan-2021	963.85	0	963.85
Balini, Barbara ( BALI,B )	15834.75	Sick	13-May-1992	CARSON	FTNAW	24-Jan-2021	770.81	0	770.81
Aaberg, Lise ( 2AABJE,L )	13065.30	Sick	07-Sep-1992	WE	AccAsc	24-Jan-2021	108.29	6.00	102.29
Bailey, William ( BAILE,W )	9791.32	Sick	05-Dec-2011	DE	APTSW	24-Jan-2021	201.26	0	201.26

## \*\* New \*\* Daily Schedule Details

A new Scheduling setting can be used to include pay code details on the Daily Schedules grid. To turn this option on, go to SS | Settings | Setup, find the 'ShowPayCodeOnDaily' setting, and enter Yes in the Values field. (#3608)

4	ShowPayCodeOnDaily	Yes
---	--------------------	-----

## \*\* New \*\* Shift Frequencies

Shifts with longer timeframes between coverage repeats are configured using the 'Other Weekly' Frequency which can be set for up to 12 weeks. (#3722)

## Schedules Pages

### SHIFTS TO BE FILLED

When the Shift grid is refreshed, focus will return to the previously selected shift. (#3780)

When the Seniority field is not one of the selected fields in the Employees grid, an error message will no longer be displayed. The Employees grid will still sort by seniority by default. (#3679)

### MONTHLY & DEPARTMENT MONTHLY CALENDARS

On the calendar pages, assignments will be displayed regardless of the first day of Month. (#3797)

A new set of Scheduling Settings have been added in this release to suppress shift details on the Monthly and Department Monthly calendars. To suppress shift details on the page, change the setting's Value, 'ShowDetailOnDeptMonthly' and/or 'ShowDetailOnEmployeeMonthly' to 'No'. (#3814)

O'Connor, Sandra (CONN,S)		
Tuesday	Wednesday	Thursday
Jun 1	Jun 2	Jun 3
11:00 AM 9:00 PM CO-A2 (CO-OP)	11:00 AM 9:00 PM CO-A2 (CO-OP)	11:00 AM 9:00 PM CO-A2 (CO-OP)
11:00 AM 1:00 PM CO-A2 (CO-OP)	11:00 AM 1:00 PM CO-A2 (CO-OP)	11:00 AM 1:00 PM CO-A2 (CO-OP)
1:00 PM 3:00 PM CO-A2 (CO-OP)	1:00 PM 3:00 PM CO-A2 (CO-OP)	1:00 PM 3:00 PM CO-A2 (CO-OP)
3:00 PM 6:00 PM CO-A2 (CO-OP)	3:00 PM 6:00 PM CO-A2 (CO-OP)	3:00 PM 6:00 PM CO-A2 (CO-OP)
6:00 PM 9:00 PM CO-A2 (CO-OP)	6:00 PM 9:00 PM CO-A2 (CO-OP)	6:00 PM 9:00 PM CO-A2 (CO-OP)

4	ShowDetailOnDeptMonthly	No
4	ShowDetailOnEmployeeMonthly	Yes

*Department Monthly with No Details*

Tuesday	Wednesday	Thursday
Jun 1	Jun 2	Jun 3
11:00 AM 9:00 PM O'Connor, Sandra (CO-A2)	11:00 AM 9:00 PM O'Connor, Sandra (CO-A2)	11:00 AM 9:00 PM O'Connor, Sandra (CO-A2)
Arthur, Amy (CO-NA)		11:00 AM 9:00 PM Danbar, Rena (CO-A2)

Monthly Calendar with Details

## Employee Pages

Filters applied to the Assignment List, Employee Annual & Employee Monthly pages will only be applied to the employees, not the assignments. (#3721)

## Scheduling Tools

### SHIFT HANDLE

When assigning an employee to a Conditional Vacancy, the original assignments details will be applied to the new assignments. New options will be displayed to allow the Position, Assignment Type and EI Class (when used) to be overridden as necessary. The Override options will be defaulted according to the 'DefaultShiftExchangeOverride' Setting. (#3820)

Shift Details

Keep assignment Position

Override: SIL - Support Ind. Living Workε

Keep assignment EI Class

Override: (Use Default)

Keep assignment Type

Override: (Use Default)

The Shift Handle tool will use the default Notification Type in SS Settings, 'ShiftHandleNotificationType' when the 'ShowNotificationTypePrompt' is set to 'No'. (#3788)

### TIME FILE IMPORT

The Time File Import tool will import dates formatted as ddMMyy when that format is selected. (#3859)

The Time File Import tool performance has been enhanced to reduce import time. (#3889)

### FREEZE\UNFREEZE

The Freeze\Unfreeze tool and the Stat Holiday tool report popups have been resized to ensure the report window displays the full report. (#2668)

### PAYROLL EXPORT

The Payroll Export to ComVida Payroll will default the Transaction Rate to zero when the Item's rate hasn't been set. (#3854)

### Scheduling Reports

Sign-In Sheets have a new option to include the Position Code on the report. (#3875)

The Shift Criteria grid on To Be Filled Sheet and In The Building reports supports using a double-click on shift to set the filter. (#3915)

## Payroll

### Items

#### \*\*NEW\*\* NO DUPLICATE AMOUNTS OPTION

\*\*\*New\*\*\* Items have a new 'No Duplicates' setting to prevent multiple Amounts for Items that should only have one Amount per employee. (#3751)

Item Code	Label	Description	Required	Rate	Type Block	Cycle	Balance	Prop Base	EI Hours	Counted	No Duplicates
											Checks
6499	GROSS	GROSS EARNINGS	<input checked="" type="checkbox"/>		N -NNN-N -	PERIOD	Not in Balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7050	EI ER U	EI -EMPLOYER UNQUALIFIED 1.4	<input checked="" type="checkbox"/>		E -NNN-N -EEe	PERIOD	Not in Balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7060	EI ER Q	EI EMPLOYER QUALIFIED 1.289	<input checked="" type="checkbox"/>		E -NNN-N -EEe	PERIOD	Not in Balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9900	NET PAY	NET PAY	<input checked="" type="checkbox"/>		nN -NNN-N -	PERIOD	Payout Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### FORMULA SETUP

Changes made to the Reverse flag of a Formula will be saved regardless of whether there are changes to the Formula. (#3860)

### FILTERING

Applying an Item filter with a space in the last position will no longer display an Invalid Filter error. (#3811)

### REQUIRED ITEMS REPORT

The Items Setup report has a new 'Required' criteria checkbox to allow reporting of only Items marked as Required. (#2891)

Required:

## Transactions & Adjustments

Adding Transactions or Adjustments to prior pay periods will be prevented when copying a previous Year/Period Transaction or Adjustment. (#3800)

## Payroll Tools

### PAY SLIP & CHEQUE MANAGEMENT

The Export Pay Slips tool will display a confirmation message when leaving the tool prior to downloading file. (#3799)

Test cheques produced in the Generate Cheques tool include the amount in words. (#3821)

Generating Pay Slips using the Full-page Uncompressed Pay Slip format (E) will print all Pool amounts. (#3834)

### T4 & T4A SLIP HANDLING

The T4A Summary Report will include a total for Box 028 on the last page. (#3833)

Exported T4A slips will be marked as Submitted. (#3857)

Email T4s will use the PR Setting 'CVCPRUseEmailAuthentication'. (#3342)

### PIER CHECK

The PIER Check tool will default to the current pay period. (#3816)

The PIER Check tool will include the Number of Pay Periods with earnings when the EI Class filter is set to a wildcard. (#3803)

### IMPORT TRANSACTIONS

When importing several transactions for one employee, the Extra will be incremented and applied to the transactions accordingly. (#3841)

### EXPORT ROE

Changes to the ROE specifications include allowances for an ROE with zero earnings, so ROE slips generated with zero earnings will be highlighted in red on the results page and available for export. (#3861)

ROE Results						
Code	Employee Name	Employee SIN	Start Date	Total Insurable Earnings	Total Insurable Hours	
ATEL/L	Atel, Lily		04-Jul-2000	7,205.80	387.50	
BAILE/W	Bailey, William		05-Dec-2011	37,305.74	1,985.00	
BAKS,A	Baksha, Amina		18-Apr-2000	0.00	0.00	
BALI,B	Balini, Barbara		13-May-1992	0.00	0.00	

### GL EXTRACT

The GL Extract tool will use the Position description (up to the first hyphen when the description contains a hyphen) instead of \*\*\* Pos GL-Acct \*\*\* when the ACCT/ACRV sort is used in the report and the Item's GL Account is blank. (#3752)

### HSCIS EXTRACT

The HSCIS Extract has been updated to support the [HEABC specifications published in December 2020](#), including a file name extension of .txt and additional validations on the exported data. (#3787)

## Payroll Reports

### PAY PERIOD REGISTER

The Pay Period Register will sort on the employee's name rather than code when the 'ReportSortByName' PR Setting is set to 'Yes'. (#3874)

When an employee's details would be split over two pages, the Pay Period Register will group the details together on the second page. (#3871)

### EMPLOYEE TRANSACTIONS REPORT

The Employee Transactions Report will apply the Non-Zero report option to transactions with zero input. (#3365)

### AMOUNTS AUDIT REPORT

The Hold value's history will be included in the Amounts Audit report and the selected pay period range will be included in the report's header. (#3527 & #3785)

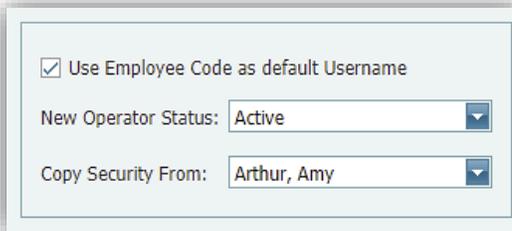
## Human Resources

### Employee Import

#### \*\*NEW\*\* OPERATOR DEFAULTS

The Employee Import tool in HR has a new option to apply operator defaults to new employees during the import process. When the 'Add new employees as operators' option is checked, a username will be given to that employee based on their employee code (up to six characters), along with a default temporary password. Please contact the Helpdesk for the default password value.

The Operator Status can also be set at the same time or left blank to be set to Inactive. If the operator settings for Security and access will be similar to that of another, existing operator, that operator can be selected from the Copy Security From list. (#3873)



The screenshot shows a dialog box with the following settings:

- Use Employee Code as default Username
- New Operator Status: Active
- Copy Security From: Arthur, Amy

### BADGE & EMPLOYEE CODES

Badge and Employee Codes that are no longer in use (previously used by another employee) will not be flagged as an error in the Employee Import Tool. (#3850)

### Employee Export

Employees with no City value in their address will be exported as blank when the CVCAAddressCity value is used in the data template. (#3855)

### Employee Skill Sets

The Skill Set Import will import blank Effective Dates and Expiry Dates as blank values rather than applying a default value. (#3832)

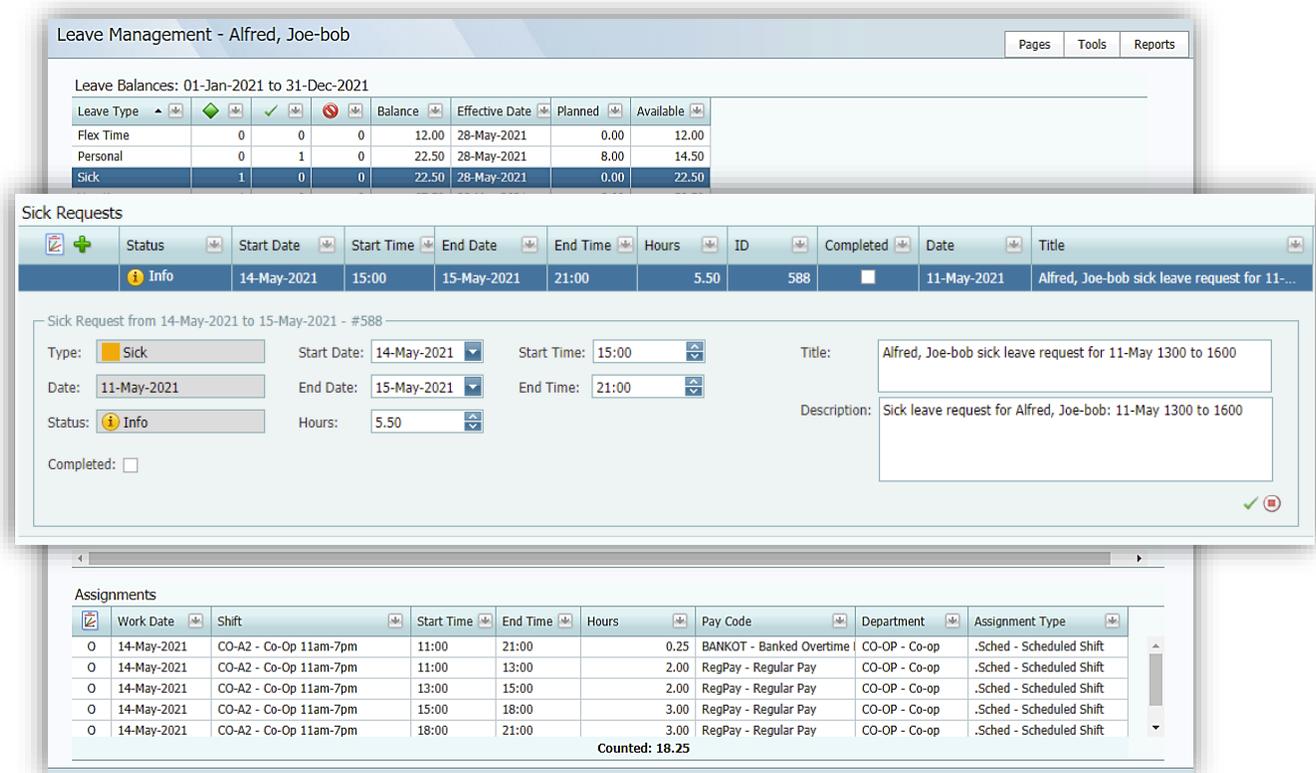
Skill Sets with no description will be included in the Export Skill Sets tool results. (#3756)

When Include All Employees is selected in the Skill Sets Report, the report will include every employee that meets the employee selection criteria with a blank Skill Set and no dates when the employee doesn't have the selected Skill Set. (#3615)

# Self Serve

## \*\*New\*\* Leave Management

The new Leave Management page in the Employee Self Serve provides a quick and easy way for employees to initiate leave requests. The page includes the employee's current Bank Balances for the current calendar year (based on SS Settings), along with their Leave Requests and current assignments for each request.



The screenshot displays the 'Leave Management - Alfred, Joe-bob' interface. It is divided into three main sections:

- Leave Balances: 01-Jan-2021 to 31-Dec-2021**

Leave Type	Balance	Effective Date	Planned	Available
Flex Time	0	28-May-2021	0.00	12.00
Personal	0	28-May-2021	8.00	14.50
Sick	1	28-May-2021	0.00	22.50
- Sick Requests**

Status	Start Date	Start Time	End Date	End Time	Hours	ID	Completed	Date	Title
Info	14-May-2021	15:00	15-May-2021	21:00	5.50	588	<input type="checkbox"/>	11-May-2021	Alfred, Joe-bob sick leave request for 11-...

Sick Request from 14-May-2021 to 15-May-2021 - #588

Type: Sick | Start Date: 14-May-2021 | Start Time: 15:00 | Title: Alfred, Joe-bob sick leave request for 11-May 1300 to 1600  
Date: 11-May-2021 | End Date: 15-May-2021 | End Time: 21:00 | Description: Sick leave request for Alfred, Joe-bob: 11-May 1300 to 1600  
Status: Info | Hours: 5.50 | Completed:
- Assignments**

Work Date	Shift	Start Time	End Time	Hours	Pay Code	Department	Assignment Type
14-May-2021	CO-A2 - Co-Op 11am-7pm	11:00	21:00	0.25	BANKOT - Banked Overtime	CO-OP - Co-op	.Sched - Scheduled Shift
14-May-2021	CO-A2 - Co-Op 11am-7pm	11:00	13:00	2.00	RegPay - Regular Pay	CO-OP - Co-op	.Sched - Scheduled Shift
14-May-2021	CO-A2 - Co-Op 11am-7pm	13:00	15:00	2.00	RegPay - Regular Pay	CO-OP - Co-op	.Sched - Scheduled Shift
14-May-2021	CO-A2 - Co-Op 11am-7pm	15:00	18:00	3.00	RegPay - Regular Pay	CO-OP - Co-op	.Sched - Scheduled Shift
14-May-2021	CO-A2 - Co-Op 11am-7pm	18:00	21:00	3.00	RegPay - Regular Pay	CO-OP - Co-op	.Sched - Scheduled Shift

Counted: 18.25

Using this page, a new leave request can easily be created with only a few mouse clicks.

## Monthly & Department Monthly Calendars

On the calendar pages, assignments will be displayed regardless of the first day of Month. (#3797)

A new set of Scheduling Settings have been added in this release to suppress shift details on the Self Serve Monthly and Department Monthly calendars. To suppress shift details on the page, change the setting's Value, 'ShowDetailOnPersDeptMonthly' and/or 'ShowDetailOnPersMonthly' to 'No'. (#3814)

O'Connor, Sandra ( CONN,S )		
Tuesday	Wednesday	Thursday
Jun 1	Jun 2	Jun 3
11:00 AM 9:00 PM CO-A2 (CO-OP)	11:00 AM 9:00 PM CO-A2 (CO-OP)	11:00 AM 9:00 PM CO-A2 (CO-OP)
11:00 AM 1:00 PM CO-A2 (CO-OP)	11:00 AM 1:00 PM CO-A2 (CO-OP)	11:00 AM 1:00 PM CO-A2 (CO-OP)
1:00 PM 3:00 PM CO-A2 (CO-OP)	1:00 PM 3:00 PM CO-A2 (CO-OP)	1:00 PM 3:00 PM CO-A2 (CO-OP)
3:00 PM 6:00 PM CO-A2 (CO-OP)	3:00 PM 6:00 PM CO-A2 (CO-OP)	3:00 PM 6:00 PM CO-A2 (CO-OP)
6:00 PM 9:00 PM CO-A2 (CO-OP)	6:00 PM 9:00 PM CO-A2 (CO-OP)	6:00 PM 9:00 PM CO-A2 (CO-OP)

7	ShowDetailOnPersDeptMonthly	No
7	ShowDetailOnPersMonthly	Yes

Department Monthly with No Details

Tuesday	Wednesday	Thursday
Jun 1	Jun 2	Jun 3
11:00 AM 9:00 PM O'Connor, Sandra (CO-A2)	11:00 AM 9:00 PM O'Connor, Sandra (CO-A2)	11:00 AM 9:00 PM O'Connor, Sandra (CO-A2)
Arthur, Amy (CO-NA)		11:00 AM 9:00 PM Danbar, Rena (CO-A2)

Monthly Calendar with Details

## Main

### Setup

#### \*\*NEW\*\* LEAVE MANAGEMENT TYPES

The Leave Management Types table (under Setup in the Home page menu) contains the information used by the Leave Management pages to link HR Banked Hours with assignments in Scheduling. (#3837 & #3923)

Leave Management Types							
	Leave Type	Description	Balance Field	Notification Type	Pay Code	Assignment Type	Default Shift
	Flex Time	Banked Flex Time Leave Request	T_EarnedTime	Scheduling	BKFLTK - Banked Flex	(Any)	Flex - Flex Leave Tak
	Personal	Personal Leave Requests	T_SPLVE	Leave	(Any)	Leave	LOA - Leave of Absen
	Sick	Sick Leave Requests	T_Sick	Sick	Sick - Sick Leave	Sick	Sick
	Vacation	Vacation Requests	T-Vacation	Vacation	VAC - Vacation Pay	(Any)	Vac - Vacation

#### NOTIFICATION TYPES REPORT

Notification Types with no default recipients are included in the Notification Types report when all types are selected. (#3929)

## Security Groups Report

The Security Groups Report will include groups for the Main Application Type when All Application Types are selected. (#3184)