

SPRING 2019 ENHANCEMENT RELEASE GUIDE

AVANTI VERSION 9.38

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Document Release

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WHAT IS INCLUDED IN THIS RELEASE?

9.38 Avanti Enhancement Release Guide

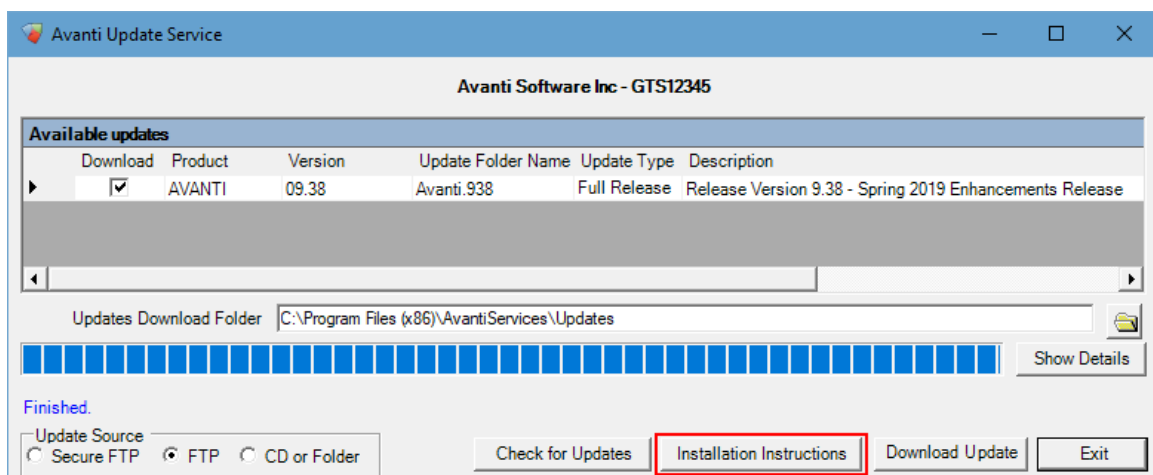
- Includes details of the enhancements that are contained in this release.

Downloadable Avanti software release Version 9.38

- Includes complete software installation. Please note that this release supersedes any previous updates/releases.

INSTALLING THE UPDATE – APPLICABLE FOR ON-PREMISE CLIENTS

Instructions to install the release are available on the Knowledge Base. Additionally, these instructions can be accessed by selecting 'Installation Instructions' once the update has been downloaded on the Avanti Update Service.



AVANTI ENHANCEMENT IDEAS

Included in this release are some client enhancement suggestions. Thank you to everyone who contributed ideas for changes to the Avanti software.



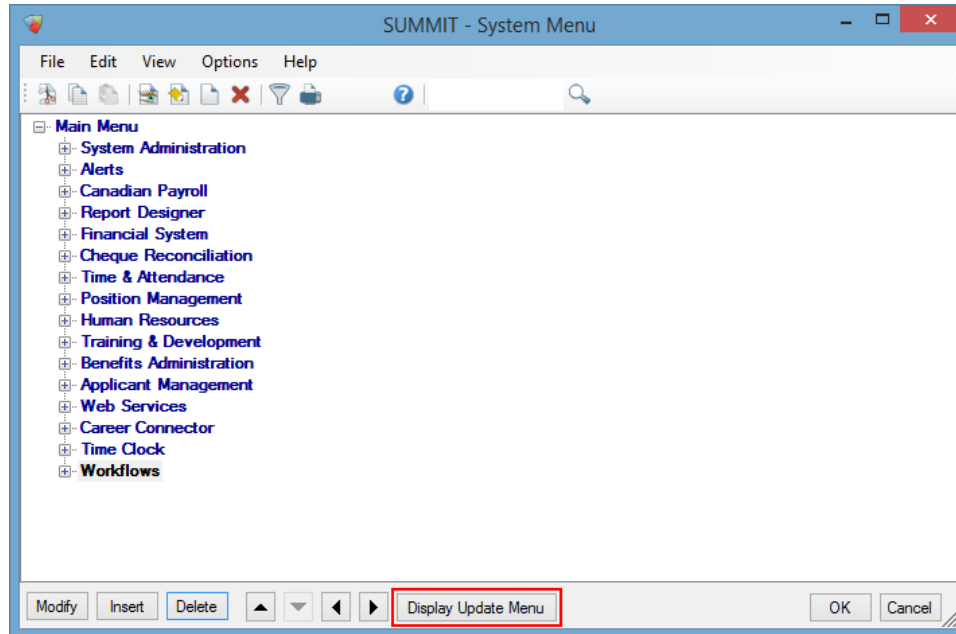
Any of the enhancements in this release document that were added as a result of your suggestions will be identified with this icon.

Do you have an idea that could improve Avanti? Avanti now has a link located on the Knowledge Base. To submit an enhancement, click the link and fill out the form.

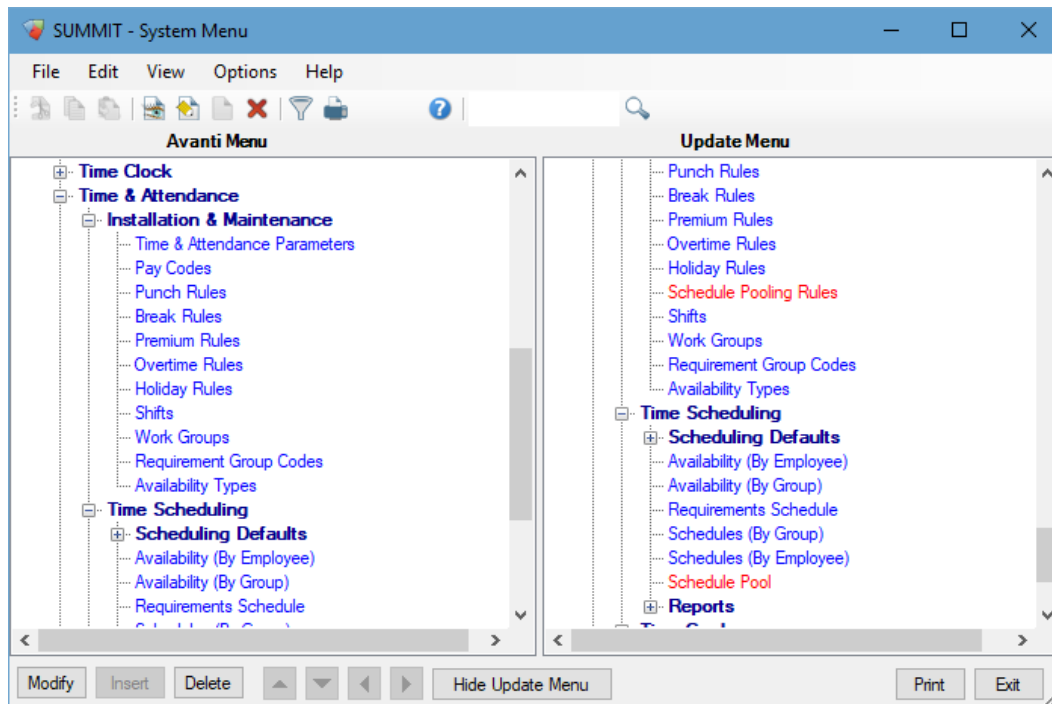
We appreciate your input on how we can improve the Avanti experience for everyone involved.

ADDITIONAL MENU ITEMS

'Display Update Menu' provides the ability to easily identify newly released or updated menu items. Menu items can be updated or added by selecting 'Display Update Menu' in System Administration >> System Menu >> System Menu.



When 'Display Update Menu' is selected, an additional column that displays the standard menu items will appear. Once selected, the 'Display Update Menu' button becomes a 'Hide Update Menu' button.



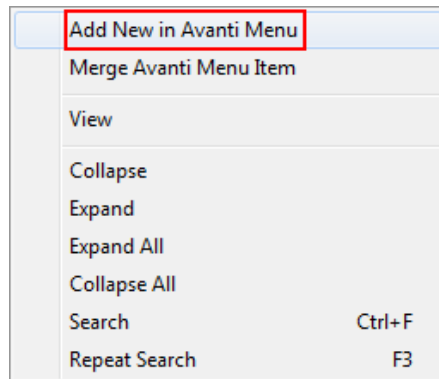
The Avanti Menu column displays all the menu items currently in your system. The Update Menu column displays the standard Avanti menu items. These menu items are colour coded for easy comparison of the menu items. Items that appear in **Red** in the Update Menu are items that are available but are not in the Avanti Menu.

Avanti Menus Colour Coding Legend:

- **Blue** – The menu item is the same in the Avanti Menu and Update Menu. No changes are required.
- **Green** – The menu item does not exist in the Update Menu. This menu item currently exists in the Avanti menu only. It may be a custom program or a manually added program. This is for informational purposes only.
- **Yellow** – This menu item can be found in the Avanti Menu and Update Menu, but there is a discrepancy between the menu items. To identify the difference, right-click on the menu item and select view.
- **Red** – The menu item does not exist in the Avanti menu. This item currently exists in the Update Menu only. It may be a menu item that was made available in a Release that was added to the Avanti Menu.

ADDING NEW MENU ITEMS INTO THE AVANTI MENU

To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select 'Add New in Avanti Menu'. For a menu item to be inserted into the Avanti Menu, it must only appear on the Update Menu. Menu items that only appear on the Update Menu will appear in red.



The following menu items will be available for clients with Time & Attendance:

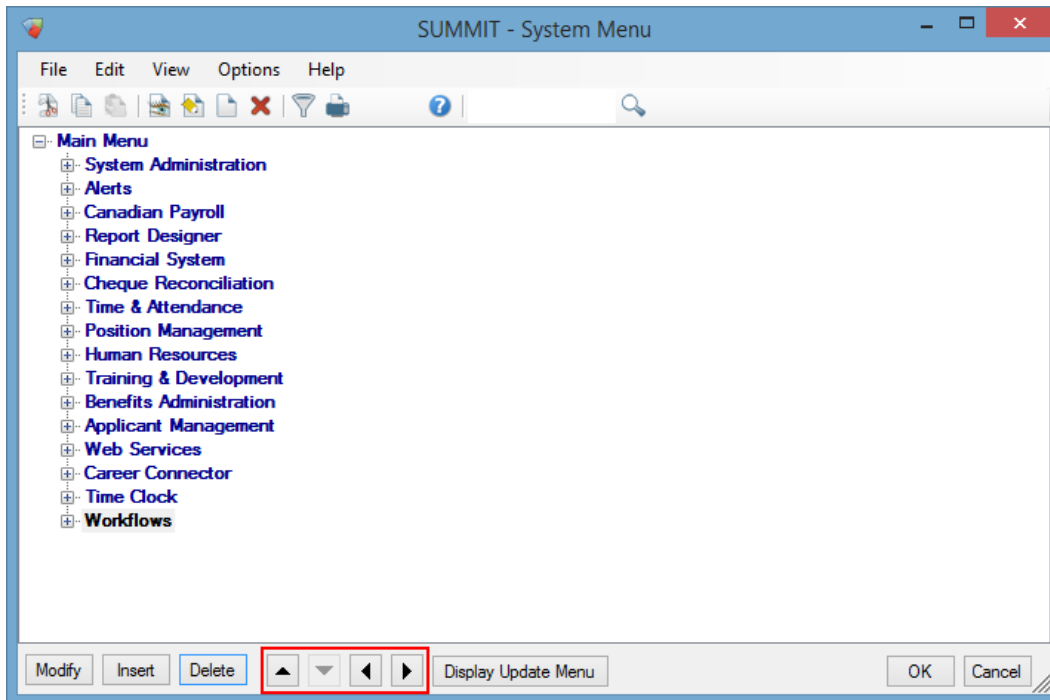
- Schedule Pooling Rules
- Schedule Pool





For more information on Schedule Pool, please refer to [Schedule Pooling](#).

RE-ARRANGING THE MENU ITEMS

Once the menu item has been added, it can be moved to a different location using the navigation panel available in System Administration >> System Menu >> System Menu.

Please Note: The navigation panel is disabled when 'Display Update Menu' is selected. If 'Display Update Menu' has been selected, please select 'Hide Update Menu'.



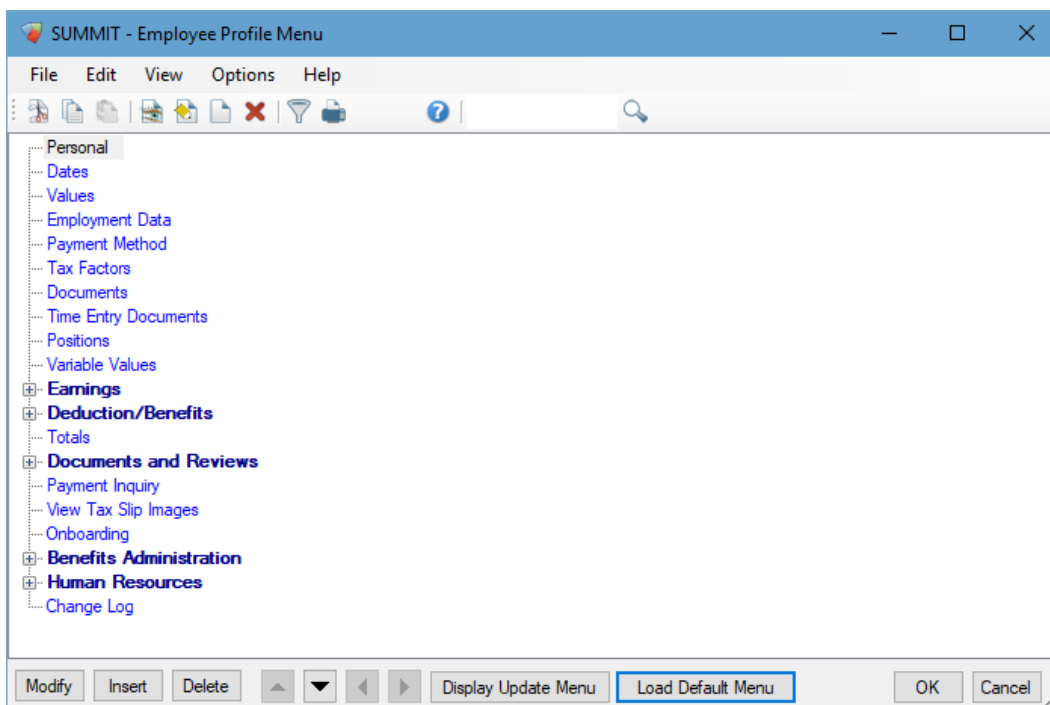
-  This button moves the highlighted menu item up in the menu.
-  This button moves the highlighted menu item down in the menu.
-  This button moves the highlighted menu item to the left in the menu.
-  This button moves the highlighted menu item to the right in the menu.

ADD NEW EMPLOYEE PROFILE MENU ITEMS

There are no new menu items in the 9.38 Release for Employee Profile. This is only applicable to clients who wish to install the menu items that were released in a previous version. Clients who do not wish to install the menu items that were previously released can skip to [System Modifications](#).

'Display Update Menu' provides the ability to compare the menu items set up to the standard menu items provided by Avanti. Menu items can be updated or added to the Employee Profile Menu. To access this functionality, select 'Display Update Menu' in System Administration >> System Menu >> Employee Profile Menu. When 'Display Update Menu' is selected, an additional column that displays the standard menu items will appear. Once selected, the 'Display Update Menu' becomes a 'Hide Update Menu' button.

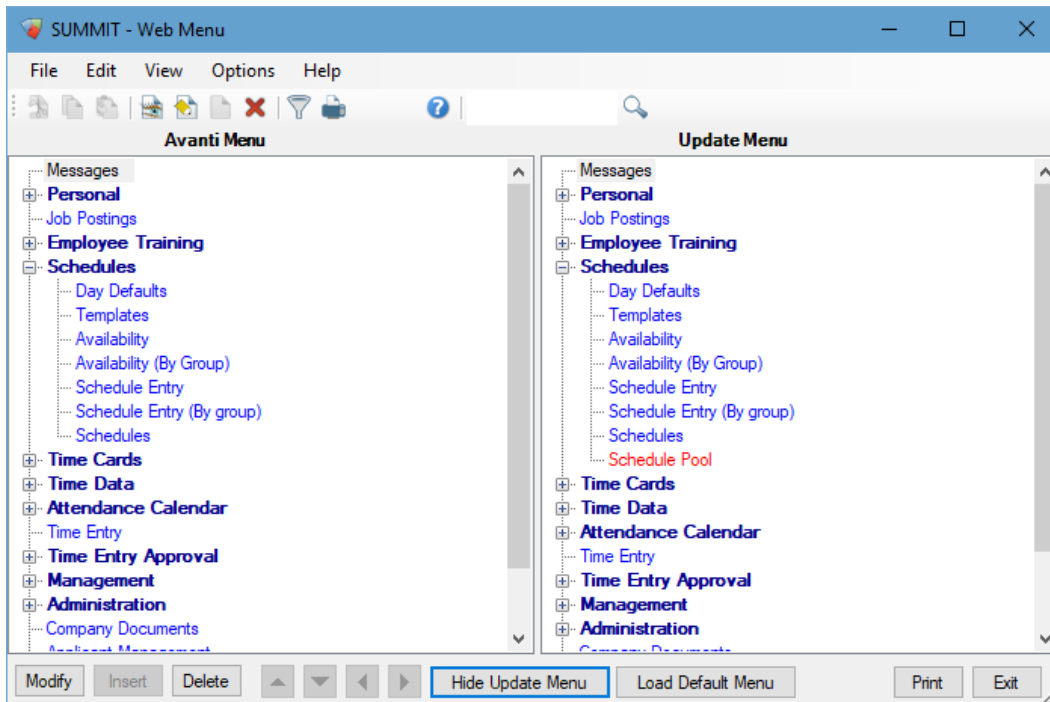
To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select Add New in Avanti Menu. For a menu item to be inserted into the Avanti Menu, it must only appear in Update Menu. Menu items that only appear on the Update Menu will appear in **red**.



ADD NEW WEB SERVICE MENU ITEMS

'Display Update Menu' provides the ability to compare the menu items set up to the standard menu items provided by Avanti. Menu items can be updated or added to the Web Menu. To access this functionality, select 'Display Update Menu' in System Administration >> System Menu >> Web Menu. When 'Display Update Menu' is selected, an additional column that displays the standard menu items will appear. Once selected, the 'Display Update Menu' button becomes a 'Hide Update Menu' button.

To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select Add New in Avanti Menu. For a menu item to be inserted into the Avanti Menu, it must only appear in Update Menu. Menu items that only appear on the Update Menu will appear in **red**.



The following menu items will be available for clients with Time & Attendance:

- Schedule Pool

For more information on Schedule Pool, please refer to [Schedule Pooling](#).

SYSTEM MODIFICATIONS

On-Premise Clients: Windows Server and SQL 2008 and 2008r2 will no longer be supported by Microsoft as of July 9, 2019. We recommend server migrations not be done to these version and plans be made to replace the existing servers running these versions.

SAVE TO EXCEL – MORE THAN 50,000 CELLS

To improve the performance when generating a large excel file, the column width will not adjust to the contents of the report when the report produces more than fifty-thousand cells. This will happen when Microsoft Excel is selected for 'Save As' and 'Suppress Formatting' is selected on the Printer Setup tab of the Report.

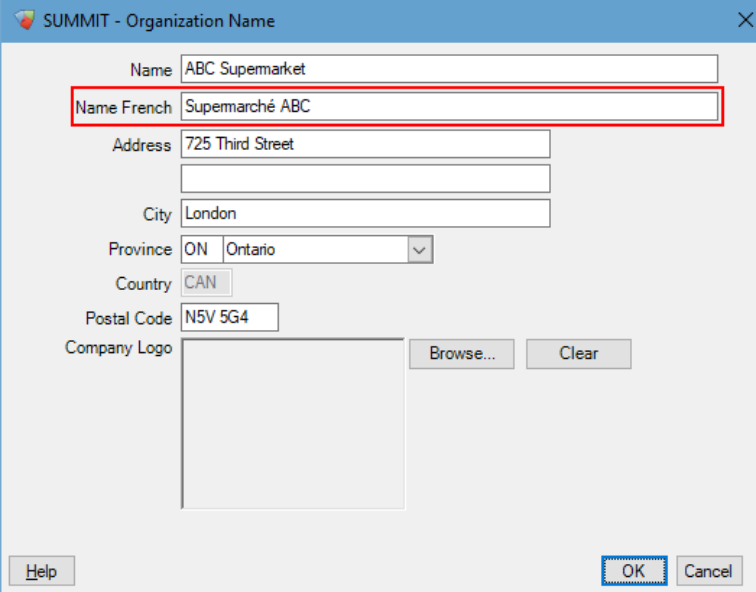
SYSTEM ADMINISTRATION

FRENCH ORGANIZATION NAME

Only applicable for clients with French. Clients who do not have French can skip to [Report Designer](#).

Name French has been added to Organization Name in Canadian Payroll >> System Parameters >> Organization Name.

If 'Name French' is specified, it will be used throughout Career Connector when the applicant is viewing Career Connector in French.



The image shows a dialog box titled "SUMMIT - Organization Name". It contains several input fields for organization information. The "Name" field is filled with "ABC Supermarket". The "Name French" field is filled with "Supermarché ABC" and is highlighted with a red rectangular border. Below this, the "Address" field contains "725 Third Street", followed by an empty field. The "City" field contains "London". The "Province" field shows "ON" and a dropdown menu with "Ontario" selected. The "Country" field shows "CAN". The "Postal Code" field contains "N5V 5G4". There is a "Company Logo" section with a large empty box, a "Browse..." button, and a "Clear" button. At the bottom left is a "Help" button, and at the bottom right are "OK" and "Cancel" buttons.

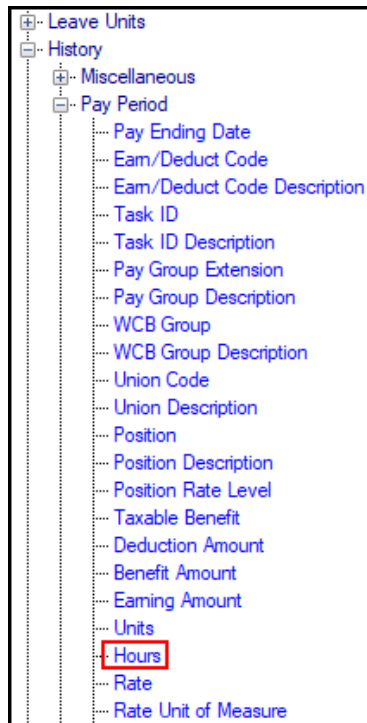
Name	ABC Supermarket
Name French	Supermarché ABC
Address	725 Third Street
City	London
Province	ON Ontario
Country	CAN
Postal Code	N5V 5G4
Company Logo	

REPORT DESIGNER

REPORT DEFINITION – NEW REPORT SOURCES

Benefits: There is a new report source to assist with designing reportsS.

- History >> Pay Period >> Hours



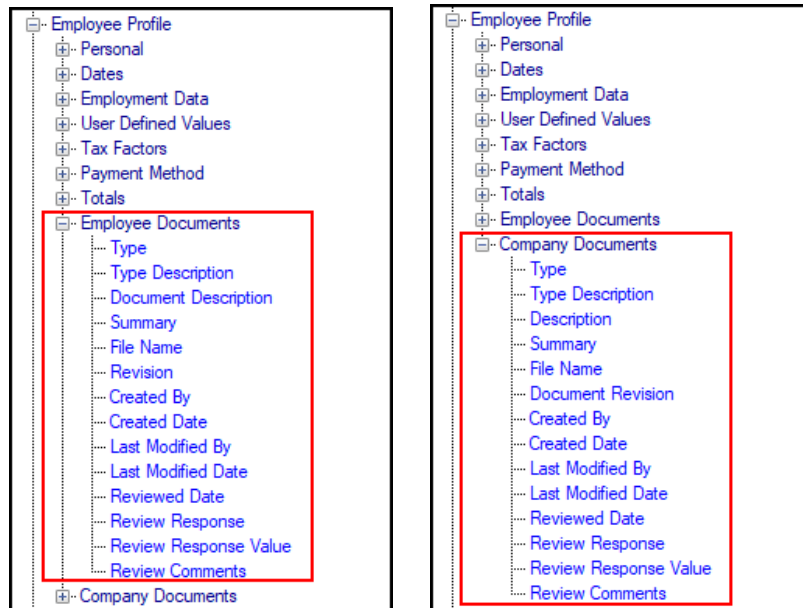
DOCUMENT TYPE PERMISSIONS IN REPORT DESIGNER

Company and Employee Documents information included in reports created in Report Designer will now take into account the users' access to the Document.



The User must have View and User Group access to the Document Type for any of the document information to be included in the report.

This will affect the following report sources.



CANADIAN PAYROLL

POSITION CODES – RATES G/L ACCOUNT MASK

Benefits: G/L accounts on position code rates now have an override on paste.

A 'Rates G/L Account Mask' has been added to the paste on Position Code. This provides the ability to update the G/L of the rates that have G/L account selected on the Rates tab.

- When 'Rates G/L Account Mask' has segments specified, each rate entry with a G/L Account on the pasted position will have the segment updated.
- When 'Rates G/L Account Mask' has segments wildcards, each rate entry with a G/L Account on the pasted position will retain the segment from the rate entry.

Please note: For the G/L to be updated, Account must be selected for Account Type on the Rate entry.

Previously, each G/L account would have to be updated separately on each rate level after the position was pasted.

For example, each position rate will have the second segment on the G/L Account updated to 1200 on the newly created Position Code. This will only update rates that have an Account for the Account Type.

Paste Copied Position

Position Code: 000222

Description: Forklift Operator

Rates G/L Account Mask: ****-1200-**** Regina

Paste Details For

- ☒ Position Levels
- ☒ Position Rates
- ☒ Position Documents

Help OK Cancel

ENTITLEMENTS – MAXIMUM LEAVE



Benefits: Maximum Leave Entitlements provides the ability to create maximums that the entitlement code cannot surpass.

Additional fields have been added to Deduction/Benefits Codes which provides the ability to create entitlement leave maximums.

The maximum can be defined as an accrued value maximum or remaining value maximum.

Accrued Value: The carried forward leave and the leave gained during the current entitlement year.

Remaining Value: The Accrued Value minus any taken during the current entitlement year.

The maximum can be defined based on a formula or a fixed value.

Once the maximum is reached, there will be no further accrual to the entitlement for the employee. You can select what will occur with any values that exceed the maximum from the following options:

- Nothing will happen to the excess.
- An earning code can be specified, which will generate an entry for each entry that exceeds the maximum. This will have pay generated during payroll processing.
- New formula variables, L9 and L10, can be used in formulas to create a single entry for the pay period.
 - L9: Leave Units over the maximum.
 - L10: Leave Dollars over the maximum.

An optional message can be displayed during payroll processing that will appear similar to the following:

Maximum Leave on entitlements can be set up on the Entitlements tab and Max Leave Formula tab on Deduction/Benefit Codes. For more information on setting up Maximum Entitlements, please refer to the Canadian Payroll Reference Guide.

Deduction/Benefit Codes

Maximum Leave can be set up on the Entitlement and Max Leave Formula tab on Deduction/Benefit Codes.

So that all entitlement options can be viewed together, the following options that were previously on the Deduction Data tab will now be available on the Entitlement tab

- Accumulate in
- Display in
- Validate taken
- Anniversary Option
- Anniversary

For more information on setting up Max Leave Entitlements, please refer to the Canadian Payroll Reference Guide.

PRO-RATE EARNING CODES

Since the number of days in a month varies, changes have been made to the calculation for pro-rating earnings for monthly and semi-monthly employees.

When pro-rating an earning for an employee with a pay group with either 24 or 12 pay periods per year, the daily rate will now be calculated by dividing the pay period rate by the working days in the pay period. The working days will be determined based on the Work Week selected on the Pro-Rate tab of the Earning Code.

Previously, the daily rate would be calculated by dividing the pay period rate by the days, as defined on the Pay Group.

ROE DATA MAINTENANCE

Changes have been made to ROE Data Maintenance to make extracting ROEs easier and more efficient for employees with multiple ROEs.

- Extract ROEs
- Set Export Date
- ROE Issued on Employee Profile

EXTRACT ROES

Benefits: Pay runs included in previously generated ROEs will not be used when extracting a new ROE.

Please note: This is only applicable if the previously generated ROE was generated using Avanti version 9.38 or higher.

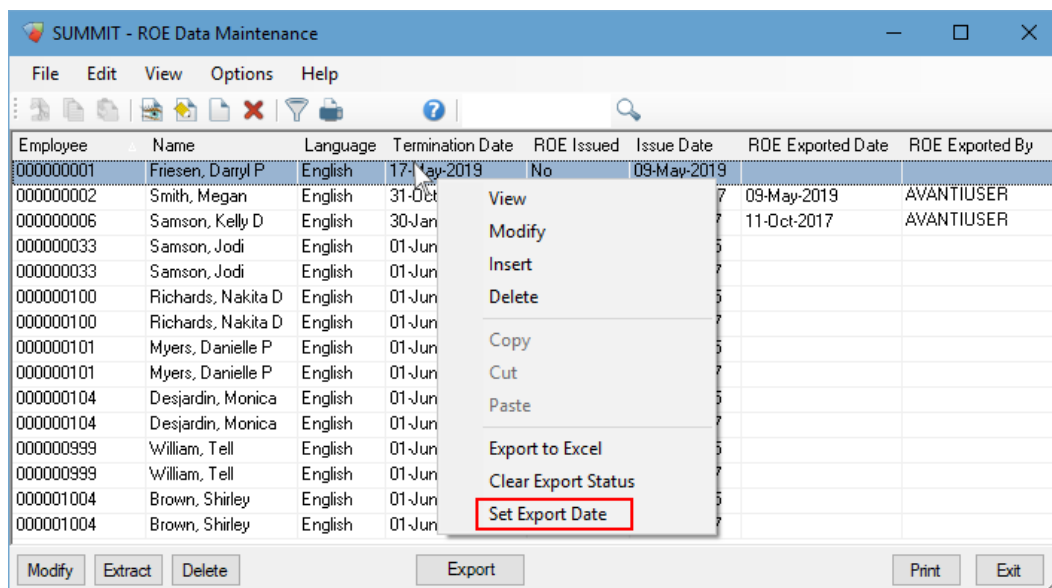
Previously, all the applicable payments would be included when an ROE was extracted regardless of whether the payment was included in a previously generated ROE.

SET EXPORT DATE

Benefits: Provides the ability to manually set the export date on ROEs that were exported prior to 9.32 to ensure the previously exported ROE will not be included in a newly created export file.

'Set Export Date' has been added to the right-click menu on the ROE Data Maintenance. This sets the Exported Date and Exported By to the current date and Avanti User. This can only be used to update ROEs that do not have an Export Date.

If the ROE has an Export Date, it will not be included if 'Exclude Previously Exported ROE' is selected when exporting.



ROE ISSUED ON EMPLOYEE PROFILE

The ROE Issued selection on the Employee Profile will no longer be used to prevent ROEs from being extracted or exported.

Previously, an ROE could only be extracted or exported if ROE Issued was deselected on the Dates tab of the Employee Profile.

NEW FORMULA FUNCTION

Benefits: Anniversary can now be used in formulas throughout Avanti.

A new formula function, @ANNIVERSARY(FV1,FV2), can be used to return a specified date as the number of days since Jan 1, 1900.

This function will use two date formula variables, FV1 and FV2.

- FV1 will be used to determine the day and month.
- FV2 will be used to determine the year.

For example, this could be used in a formula to get the month and day from the vacation date and the year from the payment date.

For example:

@ANNIVERSARY(V18,M36)

V18 = Vacation date = May 7, 2009

M36 = Payment date = May 7, 2019

The function would return a number for the date of May 7, 2019.

NEW FORMULA CONDITIONS

Benefits: AND and OR conditions can now be used in IF statements in formulas throughout Avanti.

An AND condition will be met if both statements are true. An OR condition will be met if either of the statements are true.

To include an AND condition in a formula, use one of the following:

- @AND
- &

To include an OR condition in a formula, use one of the following:

- @OR
- |

For example, If the employee's seniority month is 1 or 2 (January or February), return a 1, otherwise return 0.

For example:

@IF(@MTH(V17)=1 | @MTH(V17)=2,1,0)

WORKFLOWS

Only applicable for clients with Workflows. Clients who do not have Workflows can skip to [Applicant Management](#).

INCLUDE REPORT IN EMAIL BODY

Benefits: Reports can now be included in the message of an email.

Text, HTML, and CSV reports can now be included in the message of a report.

To have the report included in the message of an email, select 'Include Report in Email Body' on the Report Defaults tab of 'Generate Report Setting'. This will only be available for selection if one of the following is selected for Report Format:

- CSV
- Text
- HTML

The screenshot shows the 'Generate Report Settings' window with the 'Report Defaults' tab selected. The 'Report Definition' is set to 'PY000002 - Overtime Report'. Under 'Report Options', the 'Include Report in Email Body' checkbox is checked and highlighted with a red box. The 'Report Format' is set to 'Text'. Under 'Output Options', 'Send to Email' is selected. Under 'Employee Options', 'All' is selected, and 'Print Active' is checked.

By default, the report will be included at the end of the email, but {Report} can be added in the message. The report will be added where {Report} is specified.

The screenshot shows the 'Generate Report Settings' window with the 'Notification' tab selected. The 'Notification Type' is set to 'Email'. The 'Subject' is 'Employee Overtime'. The 'Message' field contains the text: 'A report has been generated.', '{Report}', and 'Please review to ensure accuracy.'.

GENERATE EMPLOYEE DOCUMENTS – ADDITIONAL OUTPUT OPTIONS

Only applicable for clients with Web Services. Clients who do not have Web Services can skip to [Applicant Management](#).

Benefits: Reports can now be emailed to employees or included in the document repository for managers to view.

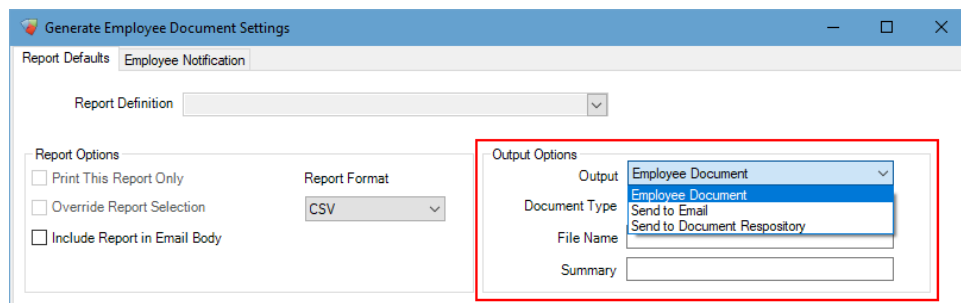
'Employee Document', 'Send to Email' And 'Send to Document Repository' are now available for selection in Output on the Report Defaults tab of 'Generate Employee Document Settings'.

If 'Employee Document' is selected, the report will be generated to the Employee Documents on the Employee Profile. A notification or Email that the document was generated can be sent.

If 'Send to Email' is selected, the report will be attached to an email that will be sent to the employee. Additionally, Text, HTML, and CSV reports can be included in the email body. An email will be sent to employees based on the Employee Options selected on the Report Defaults tab of Generate Employee Document Settings.

To be able to email employee reports, the Web Services Module and at least one Employee Self-Service User is required.

If 'Send to Document Repository' is selected, the report will be available on the Document Repository on the Avanti Self-Service Portal. Document Repository is only available for Manager and Regular Users.



The screenshot shows the 'Generate Employee Document Settings' window. The 'Report Defaults' tab is active. The 'Report Definition' dropdown is set to 'Employee Notification'. The 'Report Options' section includes three checkboxes: 'Print This Report Only', 'Override Report Selection', and 'Include Report in Email Body'. The 'Report Format' dropdown is set to 'CSV'. The 'Output Options' section is highlighted with a red box and contains a dropdown menu with three options: 'Employee Document', 'Send to Email', and 'Send to Document Repository'. The 'Document Type' dropdown is set to 'Employee Document'. The 'File Name' and 'Summary' fields are empty.

Previously, employee documents generated using a workflow could only be generated on the Employee Documents in Avanti.

APPLICANT MANAGEMENT

Only applicable for clients with Applicant Management. Clients who do not have Applicant Management can skip to [Human Resources](#).

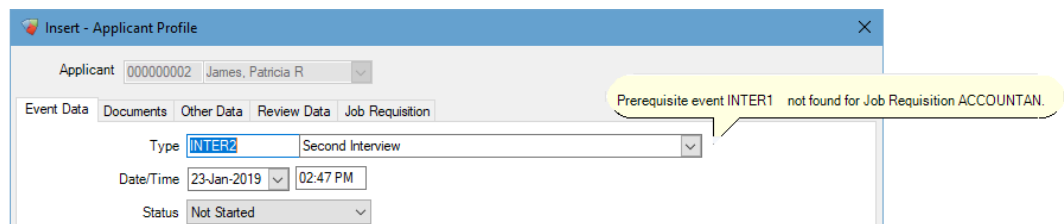
EVENT PREREQUISITES

Prerequisite validation on events now takes into account the Job Requisition selected on the prerequisite event.

For an Event with a prerequisite to be added to an applicant, the same Job Requisition must be added for both Events. If the Event does not have a Job Requisition selected, the prerequisite Event also cannot have a Job Requisition. If the Job Requisitions do not match, a message will be displayed, and the event cannot be inserted.

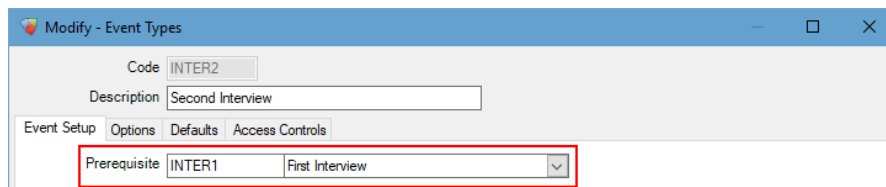
Previously, an Event could be added if the applicant had the prerequisite Event, regardless of the Job Requisition selected on either Event. Validation would only occur if the prerequisite Event was not added to the applicant.

The validation message for missing Event prerequisite appears similar to the following:



The screenshot shows the 'Insert - Applicant Profile' window. The 'Applicant' field is set to '000000002 James, Patricia R'. The 'Event Data' tab is active, showing 'Type' as 'INTER2' (Second Interview), 'Date/Time' as '23-Jan-2019 02:47 PM', and 'Status' as 'Not Started'. A yellow tooltip message points to the 'Job Requisition' field, stating: 'Prerequisite event INTER1 not found for Job Requisition ACCOUNTAN.'

A prerequisite can be selected for an event on the Event Setup tab of the Event Type.



The screenshot shows the 'Modify - Event Types' window. The 'Code' is 'INTER2' and the 'Description' is 'Second Interview'. The 'Event Setup' tab is active. The 'Prerequisite' field is highlighted with a red box, showing 'INTER1' and 'First Interview'.

APPLICANT EVENTS – AVANTI EMAIL, TASKS, AND APPOINTMENTS

Benefit: Clients using an SMTP Server or Office 365 can now send emails and appointments to applicants directly from Avanti.

Additional options have been added to Event Types which provide the ability to send emails and appointments from an SMTP Server or using Office 365. Additionally, there is now an option to create tasks in Avanti from Applicant Events.

Previously, Emails and Appointments could only be sent using Outlook and Tasks could only be created in Outlook.

The following options will be available on the Options tab in Event Types:

Modify - Event Types

Code: HIRED

Description: Applicant Hired

Event Setup | Options | Defaults | Access Controls

☒ Use Performance Reviews ☐ Use Desired Job Classification ☐ Use Outlook E-Mail ☒ Use Avanti E-Mail

☒ Use Job Requisitions ☐ Use Desired Position ☐ Use Outlook Tasks ☒ Use Avanti Tasks

☐ Use Job Offer ☐ Use Desired Location ☐ Use Outlook Appointments ☒ Use Avanti Appointments

☒ Use Documents ☐ Use Desired Pay Rate

☒ Use HTML Layout

☒ Use Attachments

Comments Heading: Comments

If 'Use Avanti E-mail' is selected, Emails will appear similar to the following when selected on the Event Data tab of the Event. Document Attachments provides the ability to attach Company Documents to the email.

E-Mail

From: People@avanti.ca

Importance: Normal Sensitivity: Normal

To: mSmith@gmail.com

Subject: Job Offer

Message: Hi Megan,
We were all very excited to meet and get to know you over the past few days. We have been impressed with your background and would like to formally offer you the position of Admin Assistance.

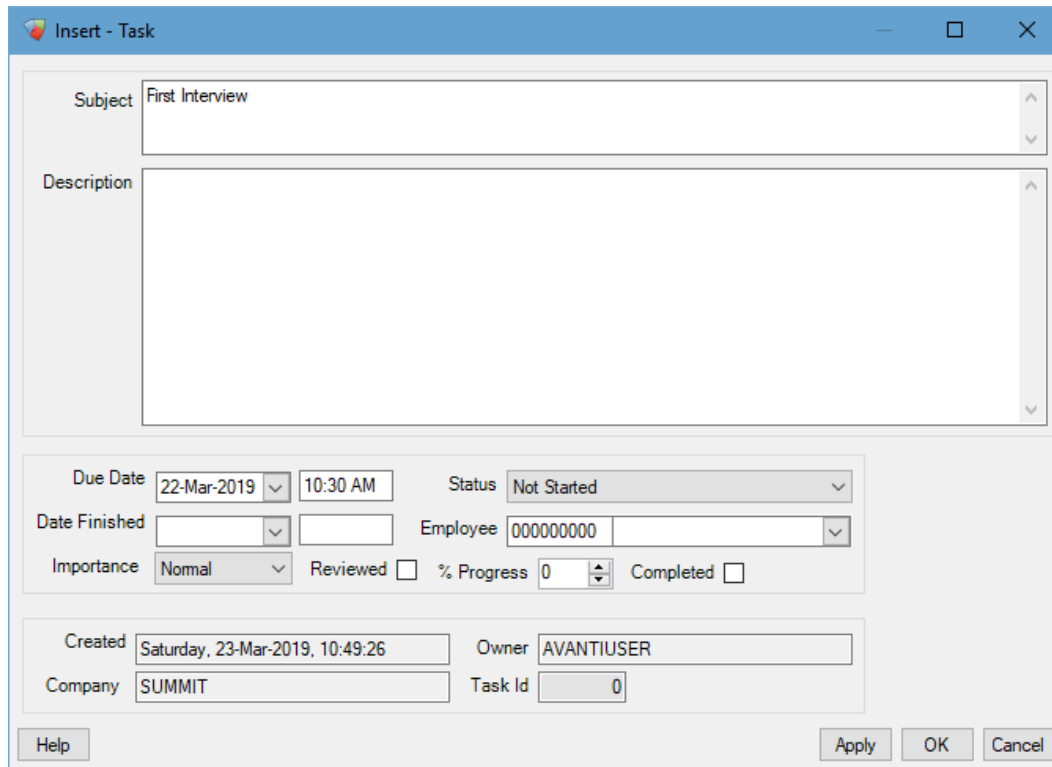
Document Attachments

Id	Type	Description	Summary	File Name	Rev.	Last Modified By	Last Modified Date
1	General	Employee Handbook		Employee Handbook.docx	0	AVANTIUSER	15-Nov-2018

0000 Add Remove

Send Cancel

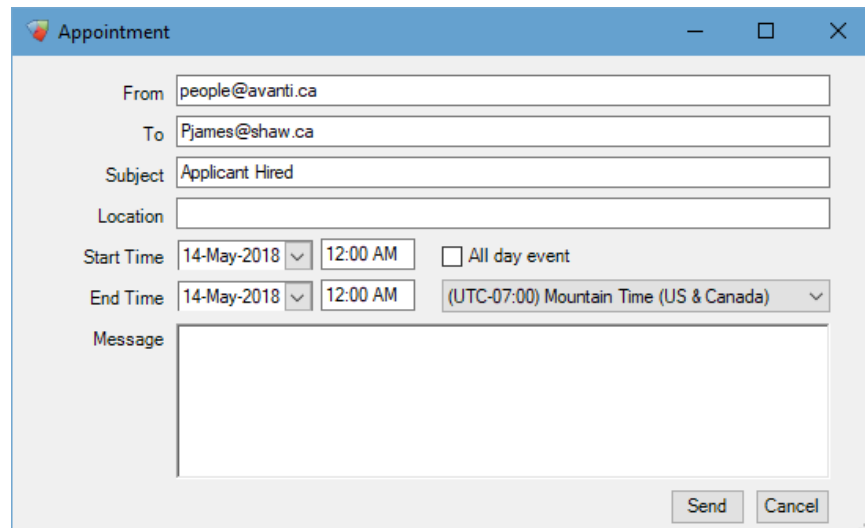
If 'Use Avanti Tasks' is selected, Tasks will appear similar to the following when selected on the Event Data tab of the Event.



The 'Insert - Task' dialog box contains the following fields and controls:

- Subject:** Text box containing 'First Interview'.
- Description:** Large text area for task details.
- Due Date:** Date picker set to '22-Mar-2019' and time set to '10:30 AM'.
- Status:** Dropdown menu set to 'Not Started'.
- Date Finished:** Empty date and time fields.
- Employee:** Text box containing '000000000' and a dropdown menu.
- Importance:** Dropdown menu set to 'Normal'.
- Reviewed:** Check box (unchecked).
- % Progress:** Spinner box set to '0'.
- Completed:** Check box (unchecked).
- Created:** Text box showing 'Saturday, 23-Mar-2019, 10:49:26'.
- Owner:** Text box containing 'AVANTIUSER'.
- Company:** Text box containing 'SUMMIT'.
- Task Id:** Text box containing '0'.
- Buttons:** 'Help', 'Apply', 'OK', and 'Cancel' at the bottom.

If 'Use Avanti Appointments' is selected, Appointments will appear similar to the following when selected on the Event Data tab of the Event.



The 'Appointment' dialog box contains the following fields and controls:

- From:** Text box containing 'people@avanti.ca'.
- To:** Text box containing 'Pjames@shaw.ca'.
- Subject:** Text box containing 'Applicant Hired'.
- Location:** Text box for appointment location.
- Start Time:** Date and time picker set to '14-May-2018' and '12:00 AM'.
- End Time:** Date and time picker set to '14-May-2018' and '12:00 AM'.
- All day event:** Check box (unchecked).
- Time Zone:** Dropdown menu set to '(UTC-07:00) Mountain Time (US & Canada)'.
- Message:** Large text area for appointment details.
- Buttons:** 'Send' and 'Cancel' at the bottom right.

JOB REQUISITION – TIME ADDED TO OPENING DATE AND CLOSING DATE

Benefits: You can now specify the time that a job posting will be available on Career Connector and ASSP.

A time has been added to the opening date and closing date fields on the Basic Setup tab of Maintain Job Requisitions. This will determine the time that the job requisition will be displayed on the Career Connector for applicants and Avanti Self-Service Portal for employees based on the timezone of the Web Server.

The screenshot shows the 'Modify - Maintain Job Requisitions' window. The 'Basic Setup' tab is active. The 'Requisition' field is 'ACCOUNTANT'. The 'Description' is 'Accountant' and 'Description French' is 'Comptable'. The 'Job Class' is '08' and 'Finance'. The 'Position' is '000006' and 'Accountant'. The 'Location' is '1100' and 'Edmonton'. The 'Union Code' is empty. The 'Entered' date is '03-May-2019' and 'Required' date is '01-Jul-2019'. The 'Opening' date is '13-May-2019' at '07:00 AM' (highlighted with a red box). The 'Closing' date is '17-Jun-2019' at '05:00 PM' (highlighted with a red box). The 'Position to Fill' is '2' and 'Positions Filled' is '1'. The 'Status' is 'Open' and 'Posting Option' is 'Internal and external'. The 'Contact' is '000000000' and 'Internal Employee' is checked.

For Opening and Closing Date to be used to determine when the Job Requisition will be displayed on Career Connector, the following must be selected in the Search section of Career Connector Settings:

- Filter Results Using Opening Date
- Filter Results Using Closing Date

For Opening and Closing Date to be used to determine when the Job Requisition will be displayed on Job Postings on the Avanti Self-Service Portal, true must be selected for the following company web settings:

- InternalJobsSettings.FilterOnClosingDate
- InternalJobsSettings.FilterOnOpeningDate

REVIEW DATA – INCREASING LENGTH OF FIELDS

Benefits: There are no limits on the length of comments that can be entered for applicant reviews.

The following fields on the Review Data tab of Applicant Events have been updated to support an unlimited number of characters:

Review Info Tab

- Reviewer Comments
- Applicant Comments

Action/Rating Tab

- Objectives

User Defined Tabs

- Comments on each performance factor

The Review Data tab will be available on an Applicant Event if the Event Type has 'Use Performance Reviews' selected on the Options tab.

CAREER CONNECTOR

Only applicable for clients with Applicant Management and Workflows. Clients who do not have Applicant Management and Workflows can skip to [Human Resources](#).

SELECT APPLICANTS ON CAREER CONNECTOR USER

Benefits: Provides the ability to onboard applicants that were not created using a Career Connector Profile.

'Create New Applicant' and the ability to select an applicant has been added to a Career Connector User on insert. This provides the ability to attach an applicant to the Career Connector User for use in a New Hire Request when a New Hire Request Workflow is setup.

An applicant will only be available for selection when a Career Connector User is inserted. An applicant will be available for selection if:

- The applicant is not attached to a Career Connector User.
- The User logged into Avanti has permissions to the employee attached to the applicant, if applicable.

Please note: if an applicant with an even applicant number is selected, the Career Connector User will not be able to access Career Connector. Applicants with even applicant numbers are created within the Applicant Profile. Applicants with odd applicant numbers are created in Career Connector.

The screenshot shows the 'Insert - Career Connector Users' dialog box. It contains fields for User ID (LLANE), Email (L.Lane@gmail.com), Failed Login Attempts (0), Lockout End Date, Password, Confirm Password, Last Password Reset, and Password Expires. There are checkboxes for 'Create New Applicant' (checked), 'Email c', 'Account', and 'Setting'. A red box highlights the 'Create New Applicant' checkbox and the 'Applicant' dropdown menu, which currently shows '000000000'. An 'Applicant Lookup' window is open over the main dialog, displaying a list of applicants with columns 'Appno' and 'Name'. The list includes: 000000003 Jones, Frank R; 000000005 Smith, Melanie D; 000000006 Smith, Harvey; 000000007 Bill, Jones B; 000000009 Taylor, Harleigh R; 000000010 James, Patricia R; 000000014 Ruland, James; 000000015 Smith, Martha D; 000000017 Grimes, Harry; 000000030 Desjardin, Monica; and 000000100 Howard, Mary. The 'Applicant Lookup' window has buttons for Help, Details, Filter, Find, OK, and Cancel.

'Create New Applicant' provides the ability to insert a new applicant in the Applicant Profile when a new Career Connector Users is inserted. Previously, when a new Career Connector User was inserted, a new applicant would always be inserted into the Applicant Profile.

HUMAN RESOURCES

Only applicable for clients with Human Resources. Clients who do not have Human Resources can skip to [Time & Attendance](#).

APPRAISALS – EMPLOYEE COMMENTS ON EACH ITEM



Benefit: Employee Comments are now available on each performance factor item in Appraisals.

'Use Employee Comments' will be available for selection for each item. If selected, the item will have an additional text box displayed beneath the Comments on Appraisals in Avanti and Avanti Self-Service Portal. Employees will be able to update this field on the Avanti Self-Service Portal.

Additionally, 'Employee Item Comment Labels' and 'Employee Item Comment Labels French' have been added to the category. These will be used to determine the label for the Employee Comments field.

Please note: 'Employee Item Comment Labels French' will only be available for clients with the French module.

The screenshot displays the 'Modify - Appraisal Setup' window. The top section contains various setup fields, including 'Setup Type' (0000), 'Category' (Performance), 'Notes Label' (%Blank%), 'Employee Comments Label', 'Performance Factors Label', 'Item Comment Labels', and 'Employee Item Comment Labels' (highlighted with a red box). The French version of these fields is also present on the right. Below these fields are checkboxes for 'Use Employee Comments' (checked), 'Show Ratings', and 'Show Rating Values'. A 'Copy Labels to Other Categories' button is also visible. The bottom section features a table with columns: Item, Item, Rating, Weighting, Item Heading Lines, and Use Comments. The table lists six items: Quantity of Work, Quality of Work, Job Attitude, Ability, Initiative, and Attendance, each with a rating of 4 and a weighting of 1. The 'Use Comments' column is set to 'No' for all items. Below the table are buttons for 'Modify', 'Insert', 'Delete', and 'Help'. A second, smaller 'Modify - Appraisal Setup' window is overlaid on the bottom right, showing the 'Item' field set to 'Quantity of Work' and the 'Item French' field set to 'Quantité de travail'. This window also has a 'Use Employee Comments' checkbox (checked) and a 'Rating Weighting' field set to 4. The 'OK' and 'Cancel' buttons are at the bottom right of this window.

Item	Item	Rating	Weighting	Item Heading Lines	Use Comments
1	Quantity of Work	4	1	1	No
2	Quality of Work	4	1	1	No
3	Job Attitude	4	1	1	No
4	Ability	4	1	1	No
5	Initiative	4	1	1	No
6	Attendance	4	1	1	No

APPRAISALS – BLANK LABELS

The following fields in the Appraisal Setup can be updated to not display a label for the field.

- Notes Label
- Employee Comments Label
- Performance Factor Label
- Item Comments Label
- Employee Item Comments Label
- Notes Label French
- Employee Comments Label French
- Performance Factor Label French
- Item Comments Label French
- Employee Item Comments Label French

For no label to be displayed on Appraisals in Avanti and the Avanti Self-Service Portal, update the corresponding field to %%Blank%% in Human Resources >> Installation & Maintenance >> Appraisals Setup.

In the example below, Notes will not have a label. Employee Comments, Performance Factors, Item Comments, and Employee Item Comments will display the default labels.

Modify - Appraisal Setup

Setup Type: 0000
Description: Probationary Employee 30 Day Review
Ratings Mask: 00*
Actions Mask: P1*

☒ Available for employee: 7 day(s) after the Completed Date.

Category: Performance

Notes Label: %%Blank%%

Employee Comments Label:

Performance Factors Label:

Item Comment Labels:

Employee Item Comment Labels:

☒ Use Employee Comments
☐ Show Ratings
☐ Show Rating Values

Notes Label French: %%Blank%%

Employee Comments Label French:

Performance Factors Label French:

Item Comment Labels French:

Employee Item Comment Labels French:

Copy Labels to Other Categories

Item	Item	Rating	Weighting	Item Heading Lines	Use Comments
1	Quantity of Work	4	1	No	
2	Quality of Work	4	1	No	
3	Job Attitude	4	1	No	
4	Ability	4	1	No	
5	Initiative	4	1	No	
6	Attendance	4	1	No	

Modify Insert Delete

Help

Apply OK Cancel

APPRAISAL HISTORY – INCREASING LENGTH OF FIELDS

Benefits: There are no limits on the length of comments that can be entered for employee appraisals.

The following fields in Appraisal History have been updated to support an unlimited number of characters:

Review Info Tab

- Reviewer Comments
- Employee Comments

Action/Rating Tab

- Objectives

User Defined Tabs

- Notes on each performance factor
- Employee Comments on each performance factor

This has also been updated on the Avanti Self-Service Portal, for clients with Web Services.

TIME & ATTENDANCE

Only applicable for clients with Time and Attendance. Clients who do not have Time & Attendance can skip to [Web Services](#).

SCHEDULE POOLING

Schedule Pooling provides the ability for employees and managers to post a shift in the future for another employee to work. The posted shift will appear in a pool, where other employees can put in a request to work the shift.

Employees can view the pool and put in a request to work a posted schedule, either by working the extra time or in exchange for one of their shifts.

A manager will approve one employee's request to work a posted shift. When a request to work a shift is approved, the other employee's request to work that shift are cancelled.

To post a schedule entry:

- the employee must have a Work Group with a Schedule Pooling Rule selected
- the Pay Code on the Shift must have 'Allow Posting' selected
- the Shift must be in the future

The setup can be configured so posted schedule entries are immediately available for exchange or pickup. Alternatively, managers will be required to approve the entry before it is available for exchange or pickup.

Schedule Pooling in Avanti

Schedule Pooling in Avanti provides the ability for managers and regular users to submit posting, pickup, and exchange requests on behalf of employees. It will appear similar to the following:

Status	Shift Date	Pay Code	From	To	Units	UOM	Position	Position Name	Location	Location Name	Shift	Shift Name	Employee	Employee Name	Pool Until	Expiry Date
Posting	4 Pickups Requested	10-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000012	Customer Service		12PM-8PM	12:00 pm - 8:00 pm	000000003	Susan York	25-Apr-2019 04:52 PM	10-May-2019 08:00 AM
Pickup	Pending Approval	10-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000022	Forklift Operator		12PM-8PM	12:00 pm - 8:00 pm	000000011	Paula Mellache	29-Apr-2019 04:52 PM	10-May-2019 08:00 AM
Pickup	Pending Approval	10-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000022	Forklift Operator		12PM-8PM	12:00 pm - 8:00 pm	000000012	Nancy Gilmour	29-Apr-2019 04:52 PM	10-May-2019 08:00 AM
Exchange	Pending Employee Acceptance	10-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	NA	NIA POSITION		12PM-8PM	12:00 pm - 8:00 pm	000000018	Georgia Harris	29-Apr-2019 04:52 PM	10-May-2019 08:00 AM
Exchange	Pending Employee Acceptance	11-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000012	Customer Service		12PM-8PM	12:00 pm - 8:00 pm	000000018	Georgia Harris	29-Apr-2019 04:52 PM	10-May-2019 08:00 AM
Exchange	Pending Employee Acceptance	11-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000012	Customer Service		12PM-8PM	12:00 pm - 8:00 pm	000000002	Megan Smith	01-May-2019 12:08 AM	11-May-2019 08:00 AM
Posting	4 Pickups Requested	11-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000012	Customer Service		12PM-8PM	12:00 pm - 8:00 pm	000000003	Susan York	01-May-2019 12:08 AM	11-May-2019 08:00 AM
Exchange	Pending Employee Acceptance	11-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000009	Human Resources		12PM-8PM	12:00 pm - 8:00 pm	000000010	Tracy Lamas	01-May-2019 12:08 AM	11-May-2019 08:00 AM
Pickup	Pending Approval	11-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	000022	Forklift Operator		12PM-8PM	12:00 pm - 8:00 pm	000000012	Nancy Gilmour	01-May-2019 12:08 AM	11-May-2019 08:00 AM
Exchange	Pending Employee Acceptance	11-May-2019	REGULAR	12:00 PM	08:00 PM	8.00	Hours	NA	NIA POSITION		12PM-8PM	12:00 pm - 8:00 pm	000000018	Georgia Harris	01-May-2019 12:08 AM	11-May-2019 08:00 AM

Results

Filter (OFF)

Employee Info

Process: None

Pickup

Exchange

Approve

Unapprove

Cancel

Undo Cancel

Reject

Unreject

Exit

For more information, please refer to the Time & Attendance Reference Manual.



Schedule Pooling in the Avanti Self-Service Portal

Schedule Pooling in the Avanti Self-Service Portal provides the ability for employees to submit posting, pickup, and exchange requests. Managers and regular users can also submit these requests on behalf of employees.

Schedule Pooling on ASSP will appear similar to the following:

The screenshot displays the Avanti Self-Service Portal interface. The top navigation bar includes the Avanti logo and various menu items: Messages, Personal, Job Postings, Employee Training, Schedules, Time Cards, Time Data, Attendance Calendar, Time Entry, Time Entry Approval, Company Documents, Applicant Management, Dashboards, and Reporting. The user is logged in as 'Lamas, Tracy' with a profile picture.

The main content area is titled 'Schedule Pool' and includes a sub-header 'Employee Mode'. Below this, there are tabs for 'Pending Requests', 'Available Shifts', and 'Post History'. The 'Available Shifts' tab is active, showing a list of shifts for 'May 2019'. The list includes columns for Date, Shift & Posted By, Pickup Option, and Details. A single shift is listed: 'Fri 12:00pm - 8:00pm' posted by 'Customer Service' (000000003 - York, Susan) with a 'Pickup or exchange' option. A search bar is present above the list.

On the right side, there is a calendar view titled 'Showing schedule for: 000000002 - Smith, Megan'. The calendar shows dates from Sunday to Saturday, with shifts assigned to specific days. The shifts are labeled as 'REGULAR' with time ranges. For example, on Monday, there is a 'REGULAR - 11:00' shift. On Tuesday, there is a 'REGULAR - 11:00' shift. On Wednesday, there is a 'REGULAR - 07:00' shift. On Thursday, there is a 'REGULAR - 07:00' shift. On Friday, there is a 'REGULAR - 07:00' shift. On Saturday, there is a 'REGULAR - 11:00' shift. The calendar also shows dates 01 through 08.

At the bottom of the page, there is a copyright notice: '© 2001-2019 Avanti Software Inc. All Rights Reserved. Terms and Conditions'.

For more information, please refer to the Web Services Reference Manual.

DISPLAY HOLIDAY RULE DETAILS ON MAINTAIN TIME DATA

Benefits: Assists in troubleshooting generated holiday hours and earnings in Avanti.

Maintain Time Data now provides the ability to display the following information used to generate the holiday on the Messages tab:

- The 'Holiday pay rule' selected on the details tab of the holiday rule.
- The date range used to determine the earnings, hours, and days.
- The earning codes used to determine the earnings, hours, and days.
- The total earnings, hours, and days from the date range.

To display these details, select 'Display Details of the Rule' on the Validation tab of Maintain Time Data. Once selected, the Holiday Rules will display on the Message tab whenever Refresh is selected.

The Messages tab will continue to display the following messages, regardless of whether 'Display Details of the Rules' is selected:

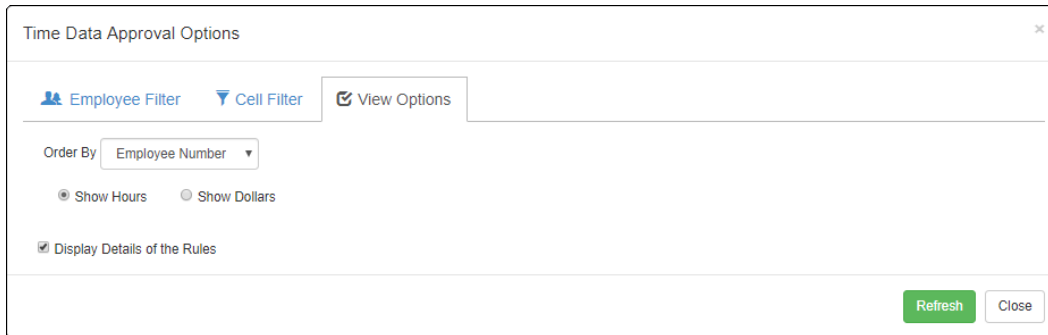
- Any qualification the employee does not meet
- Any disqualification the employee meets

If 'Use Employee Base Rate' is selected for the 'Holiday pay rule', details will not be displayed when 'Display Details of the Rules' is selected.

On the Avanti Self-Service Portal

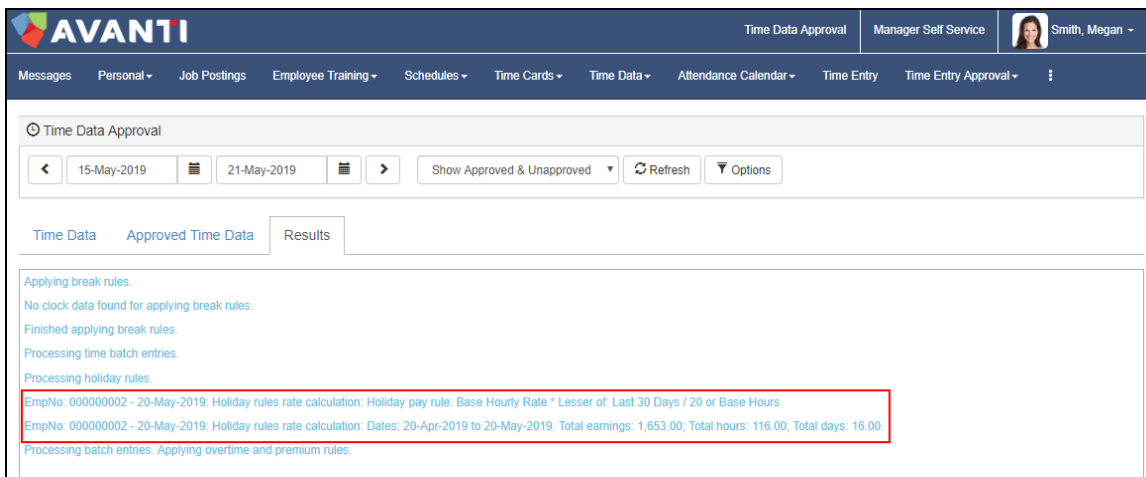
Only applicable for clients with Web Services. Clients who do not have Time & Attendance can skip to [Addition Holiday Entry for EI Hours](#).

On ASSP, 'Display Details of the Rules' will be available for selection on the 'View Options' tab of Options.



The screenshot shows a dialog box titled "Time Data Approval Options". It has three tabs: "Employee Filter", "Cell Filter", and "View Options", with "View Options" being the active tab. Below the tabs, there is an "Order By" dropdown menu set to "Employee Number". There are two radio buttons: "Show Hours" (selected) and "Show Dollars". A checkbox labeled "Display Details of the Rules" is checked. At the bottom right, there are "Refresh" and "Close" buttons.

This will display the holiday pay information on the Messages tab on Refresh.



The screenshot shows the Avanti Self-Service Portal interface. The top navigation bar includes "Time Data Approval" and "Manager Self Service". The main navigation bar lists various tabs: "Messages", "Personal", "Job Postings", "Employee Training", "Schedules", "Time Cards", "Time Data", "Attendance Calendar", "Time Entry", and "Time Entry Approval". The "Time Data Approval" section is active, showing a "Time Data Approval" header with navigation controls (back, forward, calendar icons) and a date range from "15-May-2019" to "21-May-2019". There are buttons for "Show Approved & Unapproved", "Refresh", and "Options". Below this, there are tabs for "Time Data", "Approved Time Data", and "Results", with "Results" being the active tab. The main content area displays a list of messages related to applying break rules, processing time batch entries, and processing holiday rules. A red box highlights the following text:

EmpNo: 000000002 - 20-May-2019: Holiday rules rate calculation: Holiday pay rule: Base Hourly Rate * Lesser of: Last 30 Days / 20 or Base Hours
EmpNo: 000000002 - 20-May-2019: Holiday rules rate calculation: Dates: 20-Apr-2019 to 20-May-2019. Total earnings: 1,653.00; Total hours: 116.00; Total days: 16.00.

Please Note: Refresh may have to be selected while viewing the Approved Time Data tab for the holiday information to be displayed.

HOLIDAY ENTRY TO TRACK EI HOURS

Benefits: An additional holiday entry can be created to track EI Hours. The hours will be determined based on whether the employee worked, whether the employee typically works that day, and whether the holiday is banked.

An EI Hours section has been added to the Details tab on Holiday Rules which provides the ability to select an earning code that will be used to generate an additional entry when holiday time is generated. The entry will generate with no rate and will be used to track EI Hours.

The screenshot shows the 'Modify - Holiday Rules' dialog box with the 'Details' tab selected. The 'Holiday Rule' is 'ROTATIONB' and the 'Description' is 'Rotation B Holiday Rules'. The 'Holiday pay rule' is set to 'Use Employee Base Rate'. The 'Earning codes included for holiday wage rate calculations' list includes '001 Regular Earnings' (checked) and '010 Stat Not Worked'. The 'Not Worked' section has 'Holiday Earn Code' set to '010 Stat Not Worked'. The 'Worked' section has 'Holiday Earn Code' set to '000' and 'Time Earn Code' set to '000'. The 'EI Hours' section is highlighted with a red box and contains 'EI Hours Earn Code' set to '000' and 'Normal Work Day Rule' set to 'Worked on 0 of same day in last 0 weeks'. The 'Generate the Holiday' section has '0 Days Before the Holiday Date' and '31 Days After the Holiday Date'. The 'Apply', 'OK', and 'Cancel' buttons are at the bottom right.

The EI hours for a holiday will be determined based on whether it is a normal working day, whether the Holiday Earning Code is Banked and whether the employee worked on the holiday.

The Holiday will be considered a normal working day if the employee has worked the number of days in the number of weeks specified on the Normal Work Day Rule.

The Holiday will be considered a banked holiday if the Holiday Earning Code has Accrue Leave selected for the Earning Type in Canadian Payroll >> Employer Payroll Tables >> Earning Codes.

DETERMINING THE HOURS OF THE EI ENTRY

The worked hours will be used to populate the EI earning entry if:

- The holiday is worked, the holiday is a normal working day and the holiday earning is banked.
- The holiday is worked, the holiday is not a normal working day and the holiday is banked.
- The holiday is worked, the holiday is not a normal working day and the holiday is not banked.

The greater of the worked hours or the Holiday hours will be used to populate the EI earning entry if:

- The holiday is not worked, the holiday is a normal working day and the holiday is not banked.

The Stat Hours for a holiday will be used to populate the EI earning entry if:

- The holiday is not worked, the holiday is not a normal working day and the holiday is not banked.

An EI entry will not be generated, as the EI hours would be zero, if:

- The holiday was not worked, the holiday is a normal working day and the holiday is banked
- The holiday was not worked, the holiday is not a normal working day and the holiday is banked

The Holiday Hours are the 'Holiday Hours Per Day' specified on the Work Group. If the 'Holiday Hours Per Day' is zero, the 'Hours Per Day' on the Pay Group will be used for hours.

ADDITIONAL NOTE ABOUT PREVENTING DUPLICATE EI HOURS

To prevent duplicate EI hours, the following Earning Codes specified on the Details tab of Holiday Earnings must have 'EI Hours' and 'EI Earnings' selected to be exempt in Canadian Payroll >> Employer Payroll Tables >> Earning Codes:

- Holiday Earning Code
- Time Earning Code

Modify - Earning Codes

Code 010 - 000

Full Name Stat Not Worked

Earning Data T-Slips Accumulators Formulas Pro-Rate

Short Name STATNW

% of Basic 100.000

Tax Group 00 Normal Federal Tax

Accumulate Work Units In Hours

Gen. Frequency Every Pay Period

Calc. step 1

Earning Type Normal

Leave Entit. 000

French Name Stat Not Worked

French Abbrev STATNW

☒ Active

☐ Active for Off Cycle

☒ Track Life-To-Date

☐ Formula Based Earning

☐ Use Attendance Code

☐ Suppress statement printing when earning amt = 0

☐ Suppress rate on statement - Salaried employee

☐ Suppress rate on statement - Hourly employee

☐ Suppress units on statement - Salaried employee

☐ Suppress units on statement - Hourly employee

☒ Reduce Salary

☐ Use Work Unit of Measure on Statement

☐ Apply current rate when processed

☐ Apply current G/L when processed

☐ Generate automatic earning - Salaried employee

☐ Generate automatic earning - Hourly employee

Exemptions

☐ CPP/QPP

☒ EI Earnings

☒ EI Hours

☐ QPIP Earnings

Help OK Cancel

WEB SERVICES

Only applicable for clients with Web Services.

HEADING LINES ON APPRAISALS

The height of each performance factor on the Avanti Self-Service Portal will use the Heading Lines from the Appraisal Setup when the value for Heading Lines is larger than two. ASSP will always display at least two lines for each performance factor description.

Heading Lines for each Performance Factor can be updated on each Item in Human Resources >> Installation & Maintenance >> Performance & Appraisal Codes >> Appraisal Setup.

Previously, each performance factor description would be displayed on two lines.

The image displays two overlapping screenshots of the 'Modify - Appraisal Setup' window. The background window shows a list of items with 'Understanding of Missions, Visions & Values' selected. The foreground window shows the details for this item, with 'Heading Lines' set to 3.

Background Window (Modify - Appraisal Setup):

- Setup Type: 0000
- Category: Overall Fit
- Notes Label:
- Employee Comments Label:
- Performance Factors Label:
- Item Comment Labels:
- Employee Item Comment Labels:
- ☒ Use Employee Comments
- ☐ Show Ratings
- ☐ Show Rating Values
- Item List:

Item	Item
1	Understanding of Missions, Visions & Values
2	Understanding and Application of Policies
3	Comfort On Job and Within Team
4	Interaction with Supervisor
5	Working with Colleagues
6	Interaction with Customers
7	Is highly respected by employees for sharing concerns, problems, a
- Buttons: Modify, Insert, Delete, Help

Foreground Window (Modify - Appraisal Setup):

- Setup Type: 0000
- Category: Overall Fit
- Item: Understanding of Missions, Visions & Values
- Item French:
- Heading Lines: 3
- Use Comments: ☒
- Use Employee Comments: ☒
- Ratings Mask:
- Rating Weighting: 4
- Buttons: Help, OK, Cancel

USER PREFERENCE IN TIME ENTRY & TIME ENTRY APPROVAL

Benefits: User preference can now be used for the time format on Time Entry and Time Entry Approval on the Avanti Self-Service Portal.

A User Preference option has been added to the Time Format on the From Time and To Time Fields on the Field tab of the Template.

When 'User Preference' is selected for Time Format, the times will appear in the format the User has selected for Time Format on the Preference tab of Settings on the Avanti Self-Service Portal. The user can have either AM/PM or 24 Hour selected for Time Format.

The image shows two overlapping windows from a software application. The background window is titled 'Template' and has tabs for 'Template', 'Fields', 'Criteria', 'Filter', 'Entitlements', 'Validation', and 'User Groups'. The 'Fields' tab is active, displaying a table with the following data:

Name	Is Detail	Is Visible	Is Read Only	Is Required	Default Value
Availability Date	No	Yes	No	Yes	
Availability Type	No	Yes	No	Yes	
All Day	No	Yes	No	Yes	
From Time	No	Yes	No	Yes	
To Time	No	Yes	No	Yes	
Unit	No	Yes	No	Yes	
Unit Code	No	Yes	No	Yes	
Comments	No	Yes	No	Yes	
Status	No	Yes	No	Yes	

The foreground window is titled 'Field' and is for configuring the 'From Time' field. It contains the following settings:

- Field: From Time
- ☐ Is Detail
- ☒ Required
- ☒ Visible
- ☐ Read Only
- Interval: 30
- Custom Header:
- Custom Header Fr:
- Time Format: User Preference (highlighted with a red box)
- Default Value:

Below these settings is a 'Validation' section with a table for defining validation rules:

Validation	Message	Message Fr

At the bottom of the 'Field' window are buttons for 'Modify', 'Insert', 'Delete', 'Help', 'OK', and 'Cancel'.

RECURRING AVAILABILITY ADDED TO TIME ENTRY

Benefits: Employees and managers can now create repeating availability entries on the Avanti Self-Service Portal.



A new company web setting has been added, which provides the ability for employees and managers to insert recurring availability entries.

Create availability that recurs on a daily, weekly, or monthly frequency. Additionally, entries will only be created on the specified days of the week.

For this feature to be available, select TimeEntrySettings.AllowRecurringAvailability in Administration >> Administration Settings on the Avanti Self-Service Portal. Select 'Reload Settings' once the Company Web Setting is updated in Administration >> Administration Settings on the Avanti Self-Service Portal.

When TimeEntrySettings.AllowRecurringAvailability is selected, Availability Templates in Time Entry and Availability Approval will appear similar to the following:

The screenshot displays the Avanti Self-Service Portal interface. At the top, there's a header with the Avanti logo and navigation tabs: Time Entry, Manager Self Service, and a user profile for Smith, Megan. Below the header is a navigation bar with various menu items. The main content area is titled 'Availability' and includes a search bar with the text '000000002 - Smith, Megan' and a date range '11-Nov-2018 - 24-Nov-2018'. A toolbar contains buttons for '+ Add', '+ Add Recurring' (highlighted with a red box), 'Delete', 'Edit', 'Approve', 'Unapprove', 'Reject', 'Unreject', 'Save Changes', and 'Refresh'. Below the toolbar is a table with columns: Date, Availability Type, All Day, From Time, To Time, and Status. The table currently shows 'No data to show' and 'There are currently no entries.' At the bottom, there's a copyright notice: '© 2001-2018 Avanti Software Inc. All Rights Reserved. Terms and Conditions'.