9.42 Avanti Enhancement Release Guide: Hosted
Spring 2020

Disclaimer

Avanti Software Inc. makes no representations or warranties with respect to the contents hereof and specifically disclaim any implied warranties of merchantability or fitness for any particular purpose. Furthermore, Avanti Software Inc. reserves the right to revise this publication and to make changes from time to time in the contents hereof without obligation of Avanti Software Inc. to notify any person or organization of such revision or changes.

Document Release

RELEASE: 9.42 -0420

Table of Contents

What's Included In This Release?
ENHANCEMENT RELEASE GUIDE: SPRING 2020

1

What is included in this release?

9.42 Avanti Enhancement Release Guide

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

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

Avanti has partnered with UserVoice – a third-party service designed to collect product ideas and suggestions. We call it the Avanti Product Feedback Forum Powered by UserVoice. The Product Feedback Forum is now available through the Avanti self-service portal. Look for the widget to get started

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

Additional Menu Items

There are no new menu items included in 9.42. For additional information on how to add previously released menu items, please refer to the following article in our Help Centre.

Report Designer

Report Definition – New Report Sources

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

Clients with Time & Attendance
- Time Scheduling >> Entries >> Pay Code Description
- Time Cards >> Pay Code Description

Clients with Time Clocks
- Employee Clock Data >> Employee
- Employee Clock Data >> Clock Pin
- Employee Clock Data >> Active
- Employee Clock Data >> Authority Level
- Employee Clock Data >> Display Name
- Employee Clock Data >> Card Number
- Employee Clock Data >> Use Employee Photo
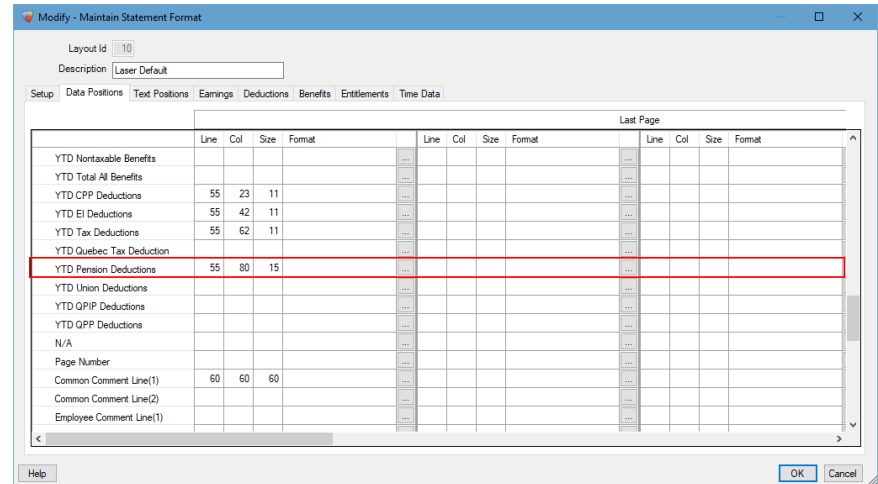- Employee Clock Data >> Reject Threshold
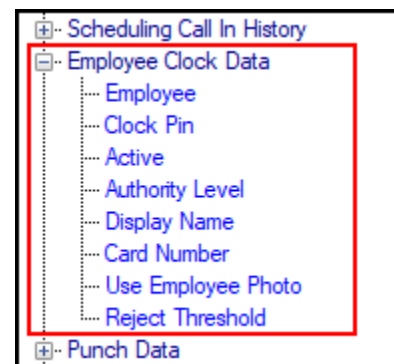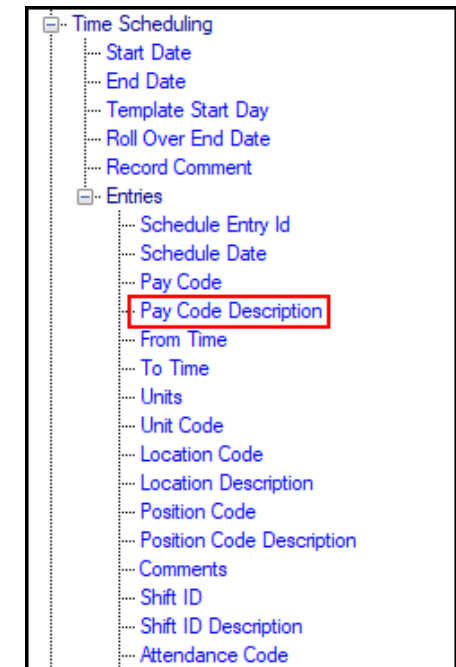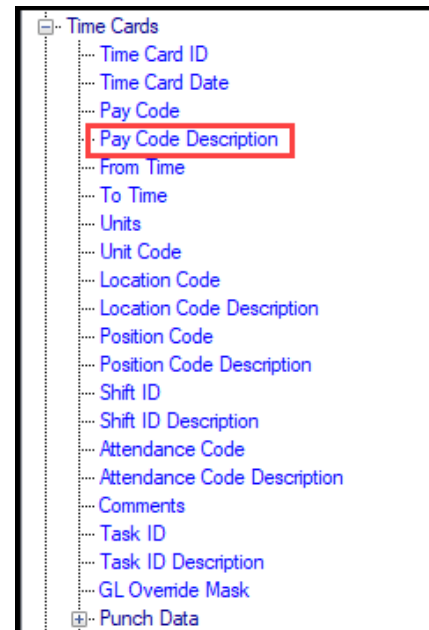
Canadian Payroll

YTD Pension Deductions on Pay Statements

Year To Date Pension Deductions on Pay Statements will now include deductions/benefits codes with the following selected for type:

- Pension
- Pension Less CPP/QPP
- Pension On Bonus
- Registered Savings Plan
- Registered Savings Plan On Bonus

Previously, only deductions/benefits codes with Pension or Registered Savings Plan selected for type would be included when YTD Pension Deductions is selected on the pay statements.

Maximum Leave Entitlements
Include leave taken during Pay Period

Leave taken can now reduce the entitlement prior to determining whether the entitlement surpasses the maximum threshold.

When the take leave earning is processed prior to the accrued leave earning, any leave taken during the pay period will reduce the entitlement prior to determining whether the entitlement is over the threshold.

Previously, leave taken during the pay period would not reduce the entitlement when the maximum leave was generated.

For Example
If the maximum threshold for banked time is 20 hours and the employee banks 25 hours and takes 10 hours, they will:
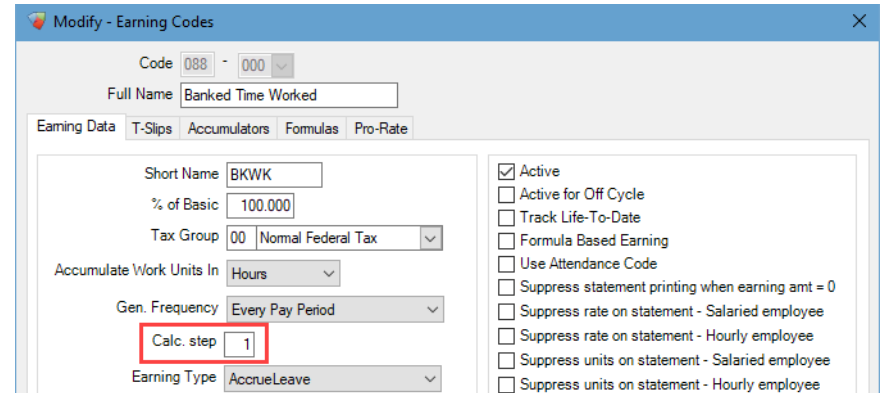
- Exceed the maximum threshold if the accrued leave is processed before the taken leave
- Not exceed the maximum threshold if take leave is processed before accrued leave

Currently using max leave entitlements?
If you are currently using max entitlements, please confirm that calculation step is set correctly on the accrued and taken earning codes.

If the calculation step is the same on both steps, take leave will reduce the entitlement if the take leave earning code number is less than the accrue leave earning code.

The calc. step on the earning code can may appear similar to the following:

Pay Comparison Report

To aid in the identification of the selected pay run, the Pay Ending Date & Description of the Pay Run selected for the periods will now be included in the Pay Comparison Report.

The Pay Comparison Report will appear similar to the following when printed.

Previously, only the run number would be displayed. When printed, the report appeared similar to the following:

January 28, 2020 12:01		Payroll Company Pay Comparison Report January 28, 2020				Report 25645 Page 1

Period 1 Pay Run(s):

Run Number	Pay Ending Date	Description
1638	31-Dec-2019	003 Monthly

Period 2 Pay Run(s):

Run Number	Pay Ending Date	Description
1627	30-Nov-2019	003 Monthly

Employee	Employee Name	Period 1 Net Pay	Period 2 Net Pay	Variance Amount	Variance Percent
000000023	Gleig, Ellen A	9,710.35	9,710.35	0.00	0.00

28-Jan-2020 12:23	Payroll Company Pay Comparison Report January 28, 2020	Report 25645 Page 1

Compare Pay Run(s): 1638   With Pay Run(s): 1627

Employee	Employee Name	Period 1 Net Pay	Period 2 Net Pay	Variance Amount	Variance Percent
000000023	Gleig, Ellen A	9,710.35	9,710.35	0.00	0.00

'Show Exported' added to ROE Data Maintenance

To reduce time spent locating employees with ROEs currently in process, a new option has been added to ROE Data Maintenance which will prevent exported ROEs from being displayed.

When 'Show Exported' is not selected, only the ROEs without an Exported Date will be displayed. When 'Show Exported' is selected, all ROEs will be displayed.

On ROE Data Maintenance, 'Show Exported' can be selected on the bottom of the screen and by selecting Options on the menu. This option will not be selected by default to display the employees that currently have ROEs that are in process.

On the Employee Profile, 'Show Exported' can be selected from the bottom of the ROE Data Maintenance screen. This option will be selected by default to display all the employee's ROE history immediately.

Interested in learning more? Please see our article in the Help Centre.
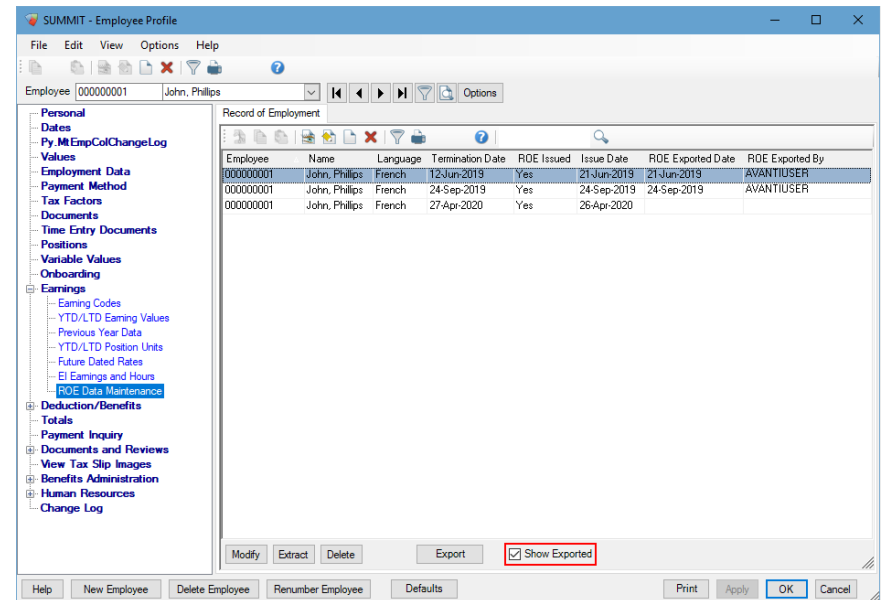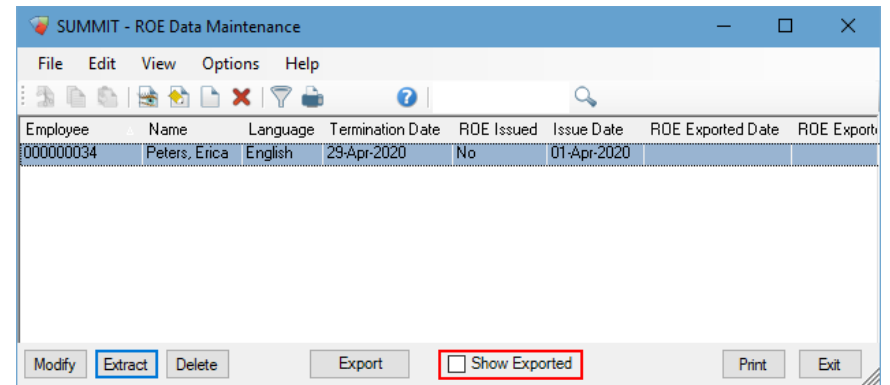
Workflows

Only applicable for clients with Workflows and Time & Attendance. Clients who do not have these can skip to Time & Attendance.

Notify employee when schedules are added

Keep employees informed about the schedules created for them with our new 'Schedule Assigned' workflow.
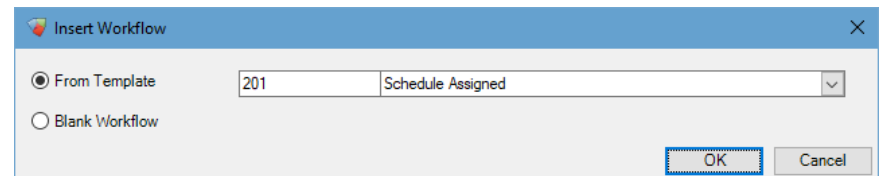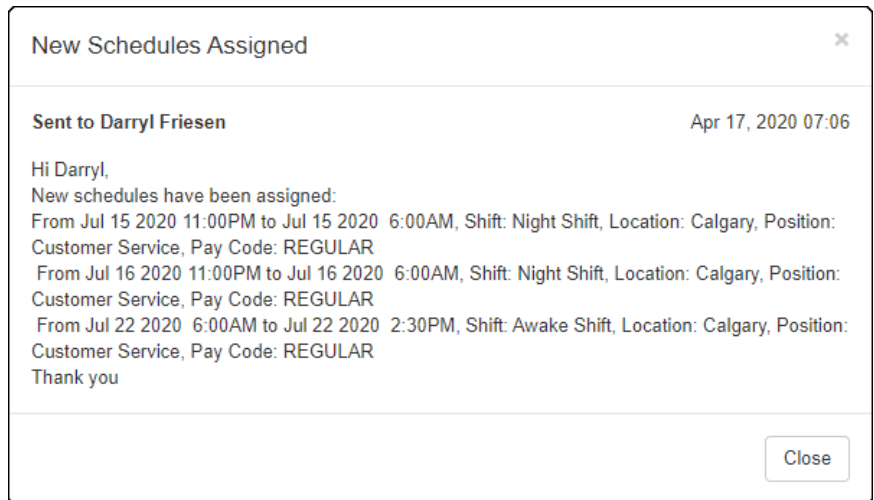
You can now create a workflow that will send an Avanti Message and an Avanti Cloud Mobile notification to employees once a schedule is created or a schedule requirement is assigned to them.

By default, the notification will be sent at least 5 minutes after the last schedule is inserted to help ensure that employees will only receive one notification when you are inserting multiple schedules.

The workflow can be added by selecting workflow '201 – Schedule Assigned' when 'From Template' is selected in Maintain Workflows.

For more information on configuring this workflow, please refer to the following article in our Help Center. You can configure the workflow by

- Update how employees get notified
- Updating the notification
- Update the delay sending notifications

New Schedules Assigned

Sent to Darryl Friesen   Apr 17, 2020 07:06

Hi Darryl,
New schedules have been assigned:
From Jul 15 2020 11:00PM to Jul 15 2020 6:00AM, Shift: Night Shift, Location: Calgary, Position: Customer Service, Pay Code: REGULAR
 From Jul 16 2020 11:00PM to Jul 16 2020 6:00AM, Shift: Night Shift, Location: Calgary, Position: Customer Service, Pay Code: REGULAR
 From Jul 22 2020 6:00AM to Jul 22 2020 2:30PM, Shift: Awake Shift, Location: Calgary, Position: Customer Service, Pay Code: REGULAR
Thank you

Close

Insert Workflow

⦿ From Template   201   Schedule Assigned
◯ Blank Workflow

OK   Cancel

Notify employee that they are scheduled to work

Help employees remember about their upcoming schedules with our new 'Schedule Reminder' workflow.
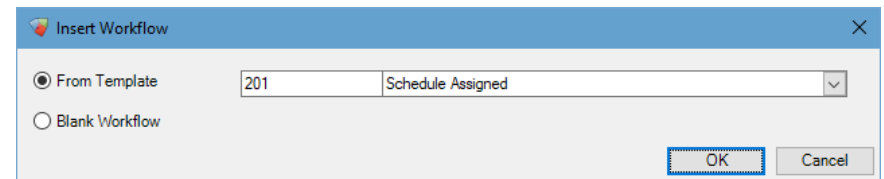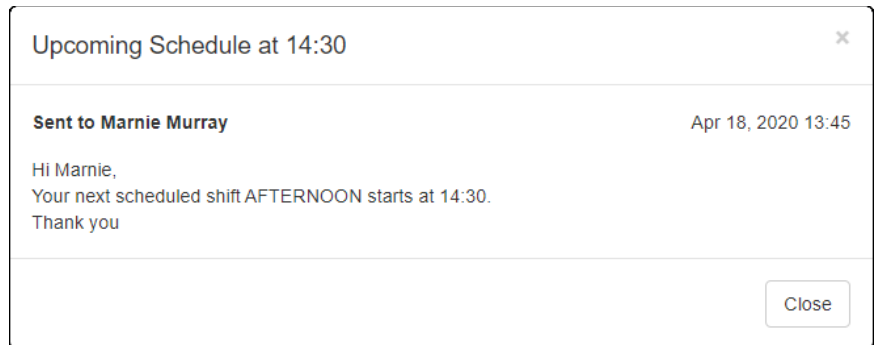
You can now create a workflow that will send an Avanti Message and an Avanti Cloud Mobile notification to employees when they are about to work

By default, a notification will be sent to employees within the hour of their schedule start time.

The workflow can be added by selecting workflow '200 – Schedule Reminder' when 'From Template' is selected in Maintain Workflows.

For more information on setting up this workflow, please refer to the following article in our Help Centre. You can configure the workflow by

- Updating how employees are notified
- Updating the contents of the notification
- Updating when employees are notified of their schedule

Upcoming Schedule at 14:30

Sent to Marnie Murray   Apr 18, 2020 13:45

Hi Marnie,
Your next scheduled shift AFTERNOON starts at 14:30.
Thank you

Close

Insert Workflow

From Template   201   Schedule Assigned
Blank Workflow

OK   Cancel

Career Connector

Only applicable for clients with Career Connector and Web Services. Clients who do not have these modules can skip to Time & Attendance.

Job Offers – Populate Offer Letter with Electronic Signature

Avanti can now populate offer letters PDF Files with the applicant's electronic signature and the following information:

- The applicant's comments on the job offer
- The applicant's response to the job offer
- When the applicant submitted the job offer response
- When the applicant first viewed the job offer

Applicants can immediately view the populated job offer on their Career Connector Profile. Once the applicant is hired, the offer letter with this information can be found on the Employee Profile.

Digital evidence can be added to offer letters by utilizing document reviews and fillable PDFs.

Want to learn more about adding digital evidence to your offer letters? please refer to the following article in our Help Center.

Once the offer letter is attached to the job offer in Avanti, all of the fields on the PDF file will be read-only.

Time & Attendance

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

Approving Availability Entries

Changes have been made when approving multiple availability entries for the same day. When there is a schedule or time-card entry created directly from approving an availability entry on the day, the existing entry will be unaffected by the 'If entries found option'.

Previously, all existing entries would be affected by the 'If entries found option' when Availability entries were approved.

Example

When an availability entry creates a time card and there is an existing time card on the same day, the following will happen when the availability entry is approved:

- If the time card was created from an availability entry, the entry will be retained and another entry will be added.

- If the time card was created from punches, a schedule or by inserting, the time card will be cancelled or deleted based on the option selected.

Copying Cancelled Schedules

Changes have been made when cancelled schedules entries are copied and pasted.

- When entries are individually selected, cancelled schedules will be copied on paste and the cancelled schedule will be removed.
- When a range of schedule entries are copied, cancelled schedules will not be copied.
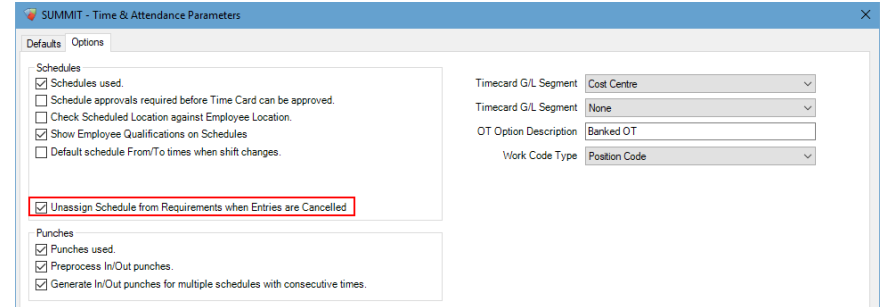
Cancel a Schedule Unassigns the Requirement Schedule

An option has been added to Avanti to unassign the Requirement Schedule when the employee's schedule is cancelled.

Previously, the Requirement Schedule would remain assigned when the schedule is cancelled.

To have the Requirement Schedule become unassigned when the employee's schedule is cancelled, select 'Unassign Schedule from requirements when Entries are Cancelled' on the Options tab in Time & Attendance >> Installation & Maintenance >> Time & Attendance Parameters.

Interested in learning more? Check out the following article in our Help Centre.

The Requirement Schedule will always be unassigned if the employee's schedule is Re-assigned, Unassigned, or Deleted.

Schedule Pooling – Comments Timeline

Benefits: At a glance, discover any comments entered, when the comments were entered and who entered the comments.

A Comments timeline has replaced the comments field on Schedule Pooling. This will display all the comments entered when there is a posting, pickup, or exchange request. It will also display the employee that entered the comments and the date/time the comments were first entered.

Employees and Managers can view these comments on the Posting Details on ASSP.

Managers and Regular Users can view the comments on the Comments tab of Schedule Pool in the Avanti Desktop.

Previously, there was a single comments field that did not provide the context of when the comment was entered or who entered the comment.
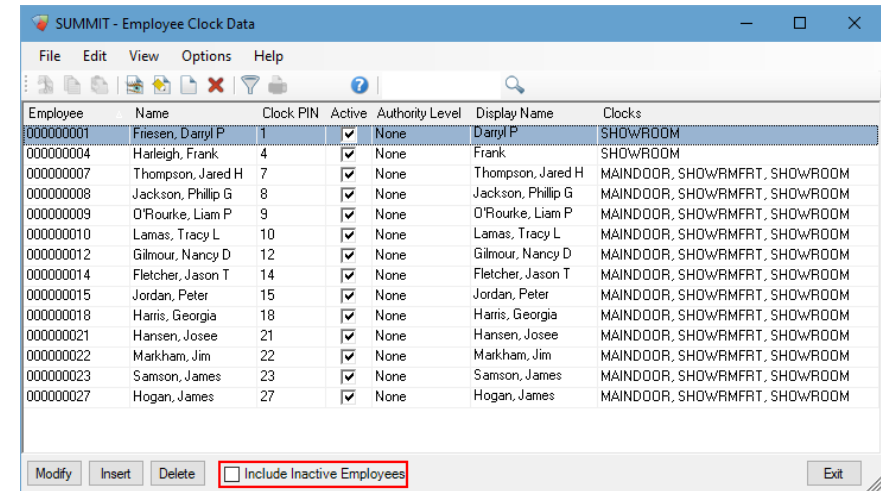
Time Clocks

Only applicable for clients with Time Clocks. Clients who do not have Time Clocks can skip to Web Services.

'Include Inactive Employees' added to Employee Clock Data

To reduce time locating employees who are using clocks, a new option has been added to Employee Clock Data which will only display employees actively using clocks.

When 'Include Inactive Employees' is deselected, only the employees that are active on clocks will be displayed. When 'Include Inactive Employees' is selected, all employees in employee clock data will be displayed.

On Employee Clock Data, 'Include Inactive Employees' can be selected on the bottom of the screen. This option will be deselected by default to only display the employees that are active on clocks.

Web Services

Only applicable for clients with Web Services.

Avanti's Product Feedback Forum Powered by UserVoice

We want your feedback to make the Avanti Product better. Avanti is now partnered with UserVoice – a third-party service designed to collect product ideas and suggestions. We call it the Avanti Product Feedback Forum – Powered by UserVoice.
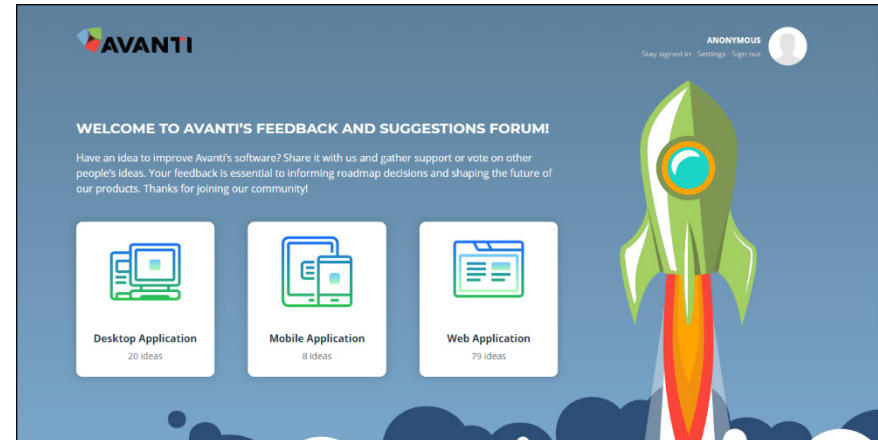
Once you have registered, you can use the feedback widget in the bottom right corner of Avanti Self-Service Portal to enter quick suggestions.
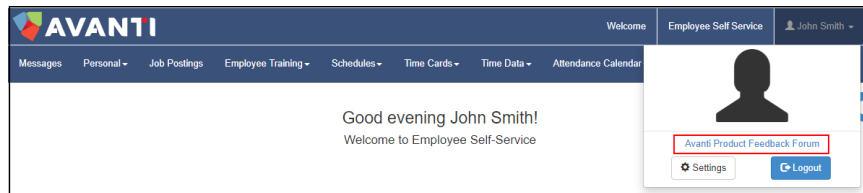
Want to vote on an existing suggestion? Select 'Avanti Product Feedback Forum' on your user profile.

From here, you can vote on existing suggestions or add suggestions to

help us make Avanti a fantastic experience!

Interested in getting started or learning more? Check out the following article in our Help Centre.

OnBoarding – Banking Details Message

A message can now be added to the Banking Details tab in OnBoarding.

This message can be formatted using HTML and will be displayed above the Default Account.

Additionally, when uploading a document is enabled, the uploaded document is now referred to as a document for 'Direct Deposit'. Previously, this document was referred to as a Void Cheque.

Display a Message when OnBoarding is completed in English
Enter the message that will be displayed when the employee views Banking Details on OnBoarding in English. This can be added to the value field in setting OnBoarding.BankMessageText.

Update this setting on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. HTML can be used to format the message. Once the setting is updated, select the 'Reload Settings' button.

Display a Message when OnBoarding is completed in French
Enter the message that will be displayed when the employee views Banking Details on OnBoarding in French. This can be added to the value field in setting OnBoarding.BankMessageTextFr.

Update this setting on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. HTML can be used to format the message. Once the setting is updated, select the 'Reload Settings' button.

Schedule Pooling – Comments on Pickup and Exchanges

Employees can now include comments when submitting pickup and exchange requests on ASSP.

Previously, employees could only include comments when posting a schedule.

Comments on pickup requests will appear similar to the following:

Comments on exchange requests will appear similar to the following:

Options to Support file upload

Additional options have been added to support uploading files.

> You may already have these settings.
> If not, it is now included in your
> company web settings.

Max File Size

Specify the maximum allowed file size when uploading files on ASSP. The default maximum files size is 2,097,152 bytes.

To update the maximum allowed file size, please enter the maximum size in bytes in company web setting FileSizeLimitInBytes. Once the setting is updated, select 'Reload Settings' in Administration >> Administration Settings on the Avanti Self-Service Portal.

Allowed file extensions when uploading a file

Ensure employees provide files in the desired format by restricting which files can be uploaded based on the file extension. File extension restrictions can be different based where in the ASSP the file is being uploaded.

The allowed file extensions can be added in a comma-separated list in the web setting value.

- To set the allowed file extensions on files uploaded throughout ASSP, update the value for AllowedDocumentExtensions.
- To set the allowed file extensions on files uploaded on Job Postings, update the value for InternalJobsSettings.AllowDocumentExtensions.

Once the setting is updated, select 'Reload Settings' in Administration >> Administration Settings on the Avanti Self-Service Portal.

Allowed document types when uploading files in Time Entry

Determine which document types can be selected when uploading documents in Time Entry on ASSP. By default, any document type can be selected when uploading a file in Time Entry.

- To restrict the document types available for selection on Time Entry on ASSP, enter a comma-separated list of the allowed Document Type IDs in the value for company web setting AllowedTimeEntryDocumentTypes.
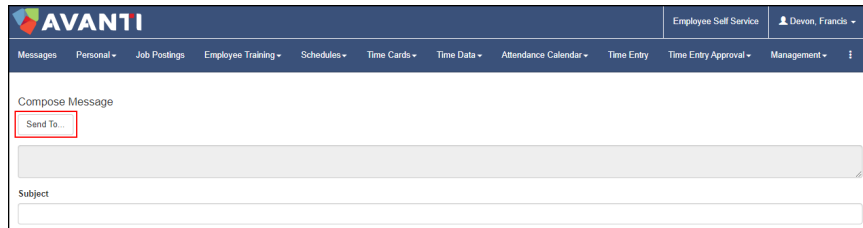
Messages –Send to Administrator only

Messages has the ability to prevent people from sending messages to anyone besides the payroll administrator.
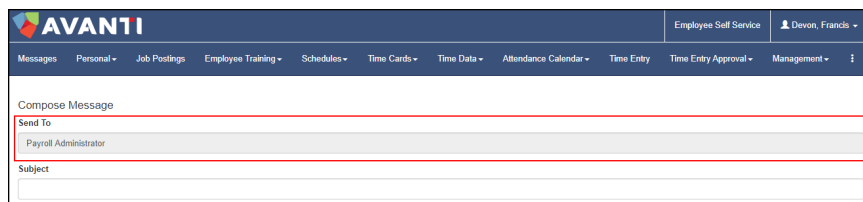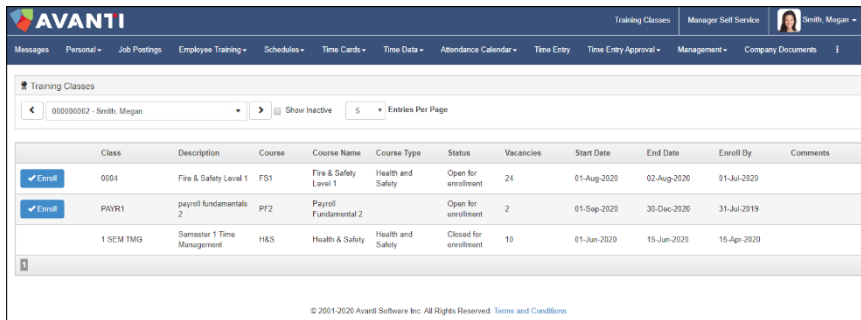
You may already have these settings.
If not, it is now included in your company web settings.

By default, users can select who to send messages to by selecting the 'Send To' on 'Compose Message':

If messages can only be sent to payroll administrator, messages will appear similar to the following when 'Compose Message' is selected:

Payroll administrators are any users in the user group(s) specified in company web setting PayrollAdministratorUserGroup.

Setup

To allow users to only send messages to payroll administrators, select value for company web setting SendMessageOnlyToAdministrator.

Once the setting is updated, select 'Reload Settings' in Administration >> Administration Settings on the Avanti Self-Service Portal.

Training – Training Displayed

Avanti has the ability to filter which classes will be displayed on Training Classes in ASSP based on the status of the class. By default, all training classes will be displayed.

You may already have these settings.
If not, it is now included in your
company web settings.

Setup

To filter based on the class status, determine which course should be displayed based on status and update the value in company web setting TrainingSettings.StatusToFilterOn. The value can be a comma-separated list of the following options:

- Open
- Closed
- Completed
- Cancelled

For example, the following can be entered for value to prevent cancelled training from being displayed:

Open, Closed, Completed

Once the setting is updated, select 'Reload Settings' in Administration >> Administration Settings on the Avanti Self-Service Portal.