

CERIDIAN

# Release Notes

Powerpay

Release 6.10

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# Publication Record

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These Release Notes describe the enhancements and fixed defects that have been incorporated into the latest release of Powerpay.

The document is organized in chapters in the following sections if they apply:

- New Functionality section, which describes the features and functions that were added.
- Enhancements, which describes the enhanced features.

For questions, please contact your Ceridian representative.

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## Summary

Welcome to the 6.10 release of Powerpay.

Some of the key enhancements that are delivered in this Powerpay release include:

- **New People reports**
  - All Entitlement Balance History report
  - People Emergency Contacts report
  - Current Entitlement Balance report
- **Company Documents expiry reminder** – You can now set email reminders up to 14 days prior to a document expiring.
- **Recalculate working days** – When working days are modified, Powerpay now automatically recalculates and updates the time consumed for all pending and approved Time Off Requests. Automatically recalculating the requests prevents incorrect pay and reduces the administrative work to manually adjust each Time Off Request to accommodate the modified working days.

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# New Functionality

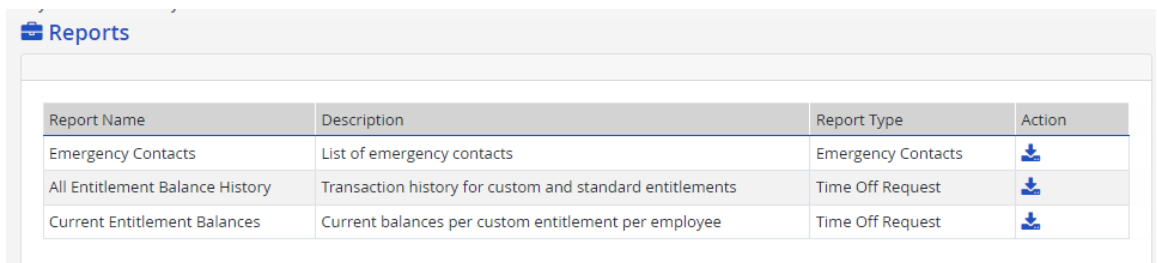
## People Reports

### Emergency Contacts Report

The Emergency Contacts report provides emergency contact related information for all Active and New employees.

► **To view the report:**

1. Go to the Reports tab (**People > Reports**).

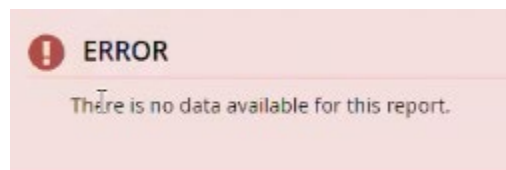


2. Click the **Download** button for the Emergency Contacts report. The report downloads in \*.csv format.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Payroll ID	Employee Number	Employee Last Name	Employee First Name	Priority	Contact Last Name	Contact First Name	Relation	Language	Phone 1 - Home	Phone 2 - Work	Work Extension	Phone 3 - Mobile	Street	City	Province/State	Postal Code
PP9T051	2	Brown	BobS	Primary	Barbara	Brown	Spouse	English	777-777-7777			345-456-6778				
PP9T051	3	Connors	CarlS	Primary	Henry	Smith		English	234-234-4555	433-888-4590		380-128-9309	45 River Road	Winnipeg	MB	R3C0T7
PP9T051	4	Jones	JohnH	Primary	Sue	Andrews	Mother	French	444-444-4444	555-555-5555		5555 666-666-6666	123 Main St	Ottawa	ON	K2S1P8
PP9T051	8	Martin	Maria	Primary	Mark	Martin			613-456-7897							

The report includes all emergency contact information available for all Active and New employees, excluding comments.

If there is no emergency contact information available for any employees, Powerpay displays the message:






### All Entitlement Balance History

The All Entitlement Balance History report includes **all** balance history records for **all** standard and custom entitlements, for **all** employees on the payroll. Use the All Entitlement Balance History report to view and track the complete history for each entitlement.

► **To view the report:**

1. Go to the Reports tab (**People > Reports**).

 Reports

Report Name	Description	Report Type	Action
Emergency Contacts	List of emergency contacts	Emergency Contacts	
All Entitlement Balance History	Transaction history for custom and standard entitlements	Time Off Request	
Current Entitlement Balances	Current balances per custom entitlement per employee	Time Off Request	

- Click the **Download** button for the All Entitlement Balance History report. The report downloads in \*.csv format.

Payroll ID	Employee Number	Employee Last Name	Employee First Name	Import Code	Entitlement Description	Date	Transaction	Changed By	Adjustment	Balance (Hours)
PP9T061	1	Allan	Andrew	BRV	Bereavement	14/07/2021	Time Off Requested	AndrewAllan	0	9
PP9T061	1	Allan	Andrew	BRV	Bereavement	14/07/2021	Time Off Requested	AndrewAllan	-9	9
PP9T061	1	Allan	Andrew	BRV	Bereavement	14/07/2021	Request Cancelled	AndrewAllan	0	18
PP9T061	1	Allan	Andrew	BRV	Bereavement	14/07/2021	Request Denied	sjones	9	18
PP9T061	1	Allan	Andrew	BRV	Bereavement	14/07/2021	Time Off Requested	AndrewAllan	0	9
PP9T061	1	Allan	Andrew	BRV	Bereavement	14/07/2021	Time Off Requested	AndrewAllan	-9	9
PP9T061	1	Allan	Andrew	BRV	Bereavement	01/07/2021	Grant - Annual	Powerpay	18	18
PP9T061	1	Allan	Andrew	BRV	Bereavement	01/07/2021	Balance Reset - Annual	Powerpay	0	0
PP9T061	1	Allan	Andrew	BRV	Bereavement	21/06/2021	Time Off Requested	AndrewAllan	-8	0
PP9T061	1	Allan	Andrew	BRV	Bereavement	11/05/2021	Time Off Requested	AndrewAllan	-8	8
PP9T061	1	Allan	Andrew	BRV	Bereavement	11/05/2021	Adjustment	sjones	16	16
PP9T061	1	Allan	Andrew	BRV	Bereavement	11/05/2021	Grant	sjones	0	0
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	21/06/2021	Time Off Requested	AndrewAllan	-8	8
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	21/06/2021	Time Off Requested	AndrewAllan	-8	16
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	01/06/2021	Grant - Annual	Powerpay	24	24
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	01/06/2021	Balance Reset - Annual	Powerpay	-16	0
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	11/05/2021	Time Off Requested	AndrewAllan	-8	16
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	11/05/2021	Adjustment	sjones	24	24
PP9T061	1	Allan	Andrew	CSICK	Covid Sick	11/05/2021	Grant	sjones	0	0
PP9T061	1	Allan	Andrew	CUS1	Custom1	12/08/2021	Time Off Requested	AndrewAllan	-9	31
PP9T061	1	Allan	Andrew	CUS1	Custom1	01/06/2021	Grant - Annual	Powerpay	40	40
PP9T061	1	Allan	Andrew	CUS1	Custom1	01/06/2021	Balance Reset - Annual	Powerpay	-16	0
PP9T061	1	Allan	Andrew	CUS1	Custom1	11/05/2021	Adjustment	sdefer	16	16
PP9T061	1	Allan	Andrew	CUS1	Custom1	29/04/2021	Grant	sdefer	0	0

It includes the following information:

- Payroll ID
- Employee Number
- Employee Last Name
- Employee First Name
- Import Code
- Entitlement Description
- Date
- Transaction
- Changed By
- Adjustment
- Balance (Hours)

**Note:** An employee's entitlement balances displayed on the report may differ from the balances displayed on the Register. This is because the balances on the report include pending requests. The balances displayed on the Register do NOT include pending requests.

**Note:** Entitlements that allow an unlimited balance only display one history record with a balance of zero.

## Current Entitlement Balances Report

The Current Entitlement Balances report provides the current entitlement balances for all

employees for all custom entitlements for the payroll.

► **To view the report:**

1. Go to the Reports tab (**People > Reports**).

Report Name	Description	Report Type	Action
Emergency Contacts	List of emergency contacts	Emergency Contacts	
All Entitlement Balance History	Transaction history for custom and standard entitlements	Time Off Request	
Current Entitlement Balances	Current balances per custom entitlement per employee	Time Off Request	

2. Click the **Download** button for the Current Entitlement Balances report.

The report downloads in \*.csv format.

Payroll ID	Employee Number	Employee Name (Last, First)	Import Code	Entitlement Description	Balance (Hours)
PP9T061	1	Allan, Andrew	BRV	Bereavement	9
PP9T061	1	Allan, Andrew	CSICK	Covid Sick	8
PP9T061	1	Allan, Andrew	CUS1	Custom1	31
PP9T061	1	Allan, Andrew	VOL	Volunteer	18
PP9T061	2	Brown, Bob	BRV	Bereavement	18
PP9T061	2	Brown, Bob	CSICK	Covid Sick	16
PP9T061	2	Brown, Bob	CUS1	Custom1	32
PP9T061	2	Brown, Bob	VOL	Volunteer	18
PP9T061	3	Connors, Carl	BRV	Bereavement	18
PP9T061	3	Connors, Carl	CSICK	Covid Sick	8
PP9T061	3	Connors, Carl	CUS1	Custom1	30
PP9T061	3	Connors, Carl	VOL	Volunteer	36
PP9T061	4	Jones, John	BRV	Bereavement	18
PP9T061	4	Jones, John	CSICK	Covid Sick	15
PP9T061	4	Jones, John	CUS1	Custom1	31
PP9T061	4	Jones, John	VOL	Volunteer	26

It includes the following information:

- **One row per employee per entitlement balance (Import Code).** In other words, the file only includes one row for each employee for the same import code. However, the file may contain multiple rows for the same employee each with a different import code.
- **Payroll ID - each file contains employee records for ONE payroll number.**  
If this file is used to import the data to a new payroll, this column is used by the import validation process to validate that the file does not contain data for other Payroll IDs, and that the file is being loaded to the correct (matching) Payroll ID.
- **Employee Number**
- **Employee Name (Last, First)**
- **Import Code** – the import code assigned to the custom entitlement.  
The code is assigned in step 2 of the Custom Entitlement Setup module in Powerpay and is a maximum of four alpha-numeric characters.

- **Entitlement Description** – The description assigned to the custom entitlement in step 1 of the Custom Entitlement Setup module in Powerpay.

- **Hours (Up to 2 decimal places)** – the balance data for the employee in hours for the entitlement.

English and French number formats are supported based on the Powerpay interface logged in.

**Example:** A value of 9,999 is entered in the Hours column

- English Powerpay interface – Powerpay interprets the value as 9999
- French Powerpay interface – Powerpay interprets the value as 9.999. An error is generated because the value exceeds two decimal places.

The report is sorted by employee Number followed by Entitlement Description.

## Company Documents expiry reminder

The Company Documents expiry reminder option provides an automatic, configurable email reminder notification before a company document is about to expire. You define the schedule

when you want to be reminded to expiring items requiring attention. Use this option to save time tracking document expiration dates and eliminate the risk of expired documents.

The email reminder is sent to all Powerpay users set up on the User & Contact Mgmt page. If Role Based Security is enabled, the email reminder is sent all users with access to Company Documents page.

### Set a document expiry email for a new Company Document

1. Go to the Company Documents page (**People > Company Document**).
2. Click the **Add New Document** button.  
The Document Properties window opens.
3. Click the **Browse** button to select the document to upload.  
The following document types can be uploaded: .xlsx, .docx, .pdf, .jpeg and .png.
4. Select the file to upload and click **Open**.  
The selected file displays in the Document Name field. You can rename the document if required.
5. (optional) Select the document type from the Type list. To add a type not in the list, see [Add a document type](#).
6. (optional) Enter a version number for the document.
7. (optional) Select or enter the version date.

8. (optional) If the document requires the employee's sign off, select the **Requires Employee Sign Off** checkbox. The employee will have the ability to sign off on the document in Self Service.
9. (optional) Select a sign off deadline date. When a deadline is defined, it displays on the Company Documents page.
10. Set the document expiry date.
11. Select the number of days (1-14) before the document expires you want to receive the email notification in the **Days in Advance** field. If you do not want to receive an email reminder, select **Don't Send**.
12. Click **Next**.  
The People Selector page displays. Use the page to assign the document to specific employees. You can filter the employee list by status, department, and position. To make multiple selections from an individual list, press and hold the Ctrl key while clicking each of the items you want to select.
13. Select the status, departments, and positions of the employees to send the document to. For example, to send the document to all Active employees in departments 100 and 200, select Active in the Status list and while pressing the Ctrl key select 100 and 200 in the Department list.
14. Select the **Include all new hires that meet these criteria** checkbox to send the document to all future new hires that meet the filter criteria.
15. Click **Preview**.  
All the people in the People list who meet the selected criteria display and are selected by default.
16. (optional) Click the checkbox in the header to clear all the selections and select the individual checkboxes of the people to send the document to.
17. Click **Save**.  
The document is added to the list on the Company Documents page.  
The document displays for the assigned employees in Self Service and on the [Documents tab](#).

### Set a document expiry email for an existing Company Document:

1. Go to the Company Documents page (**People > Company Document**).



The Document Properties window opens.

3. Set the document expiry date.
4. Select the number of days (1-14) before the document expires you want to receive the email notification in the **Days in Advance** field. If you do not want to receive an email reminder, select **Don't Send**.

The screenshot shows a 'Document Properties' dialog box with the following fields:

- INFORMATION:** This feature should not be used to save personally sensitive information, such as medical records. Maximum file size to upload is 20MB.
- Upload a Document:** XLSX, DOCX, PDF, JPEG, PNG. File name: il\_1140xN.1328640002\_nzt5.jpg. Button: Browse..
- Document Name:** il\_1140xN35345435
- Type:** [Dropdown menu]
- Version:** 1
- Version Date:** 15/07/2021
- Requires Emp Sign Off:** [Unchecked checkbox]
- Sign Off Deadline:** DD/MM/YYYY
- Expiry Date:** [Radio buttons: Never, 31/12/2021]
- Reminder Email:** [Radio buttons: Don't Send, 7 Days in Advance]

Buttons: Cancel, Save

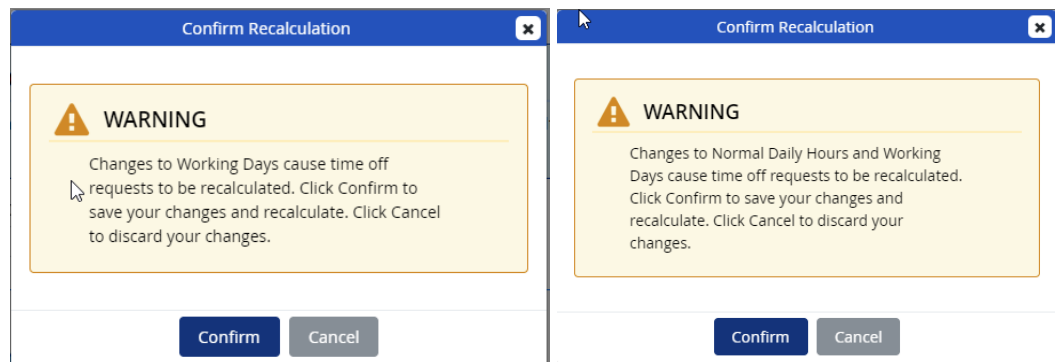
5. Click **Save**.

## Recalculate working days

When working days are modified on the Time Off tab (**People > People List > Time Off**), Powerpay now automatically recalculates and updates the time consumed for all pending and approved Time Off Requests. Automatically recalculating the requests prevents incorrect pay and reduces the administrative work to manually adjust each Time Off Request to accommodate the modified working days.

For example, if the working days are reduced, the number of hours consumed by the request is also reduced. Conversely, adding additional working days increases the number of hours consumed by the request.

When the working days or normal daily hours are modified and a recalculation is initiated, Powerpay displays a warning message.



If the recalculation, due to a change in working days, results in an insufficient balance to meet existing time off requests, Powerpay displays an error and the change to the working days is not saved. To update the working days you must first increase the entitlement balance for the employee and/or cancel any pending or approved time off requests that resulted in the entitlement exceeding its balance.

When a change to working days or normal daily hours results in a recalculation of time off request balances, Powerpay includes the recalculation in the Entitlement Balance History table.