FALL 2019
ENHANCEMENT RELEASE GUIDE

AVANTI VERSION 9.40

Document Release

RELEASE: 9.40 -1019

TABLE OF CONTENTS

WHAT IS INCLUDED IN THIS RELEASE?

9.40 Avanti Enhancement Release Guide

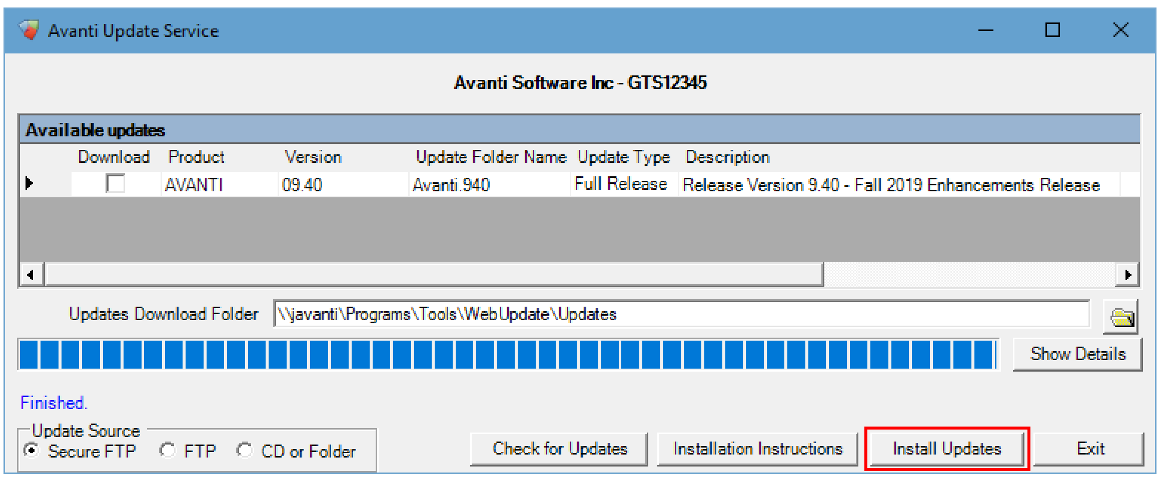
- Includes details of the enhancements that are contained in this release.

Downloadable Avanti software release Version 9.40

- 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 help.avanti.ca. Additionally, these instructions can be accessed by selecting 'Installation Instructions' once the update has been downloaded on the Avanti Update Service.



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.

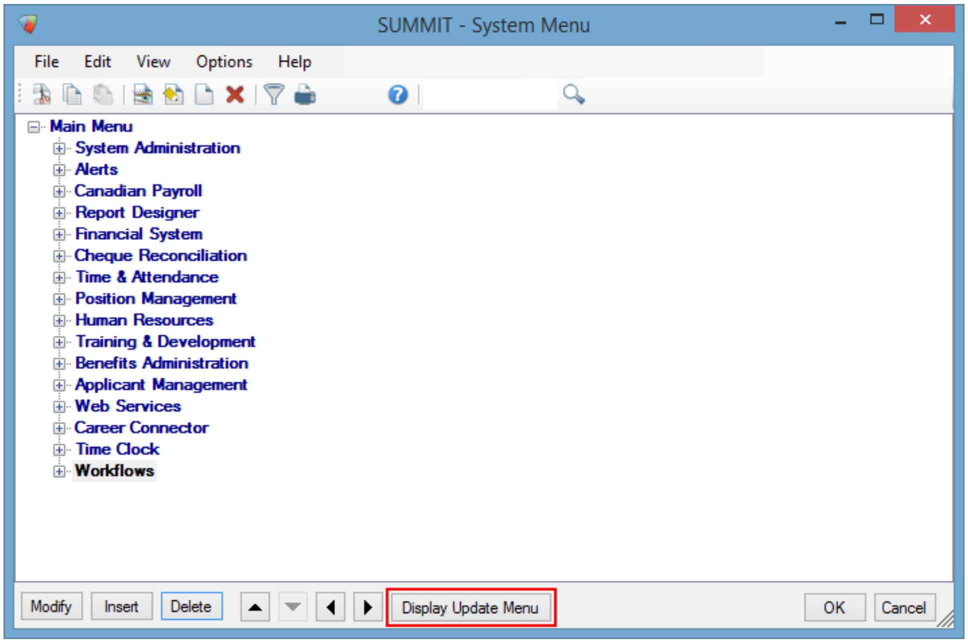
Any of the features in this release document that were added as a result of your suggestions will be identified with this icon.

Do you have an idea that could improve Avanti? Avanti now has a link located on the Avanti Help Center, help.avanti.ca. 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 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.



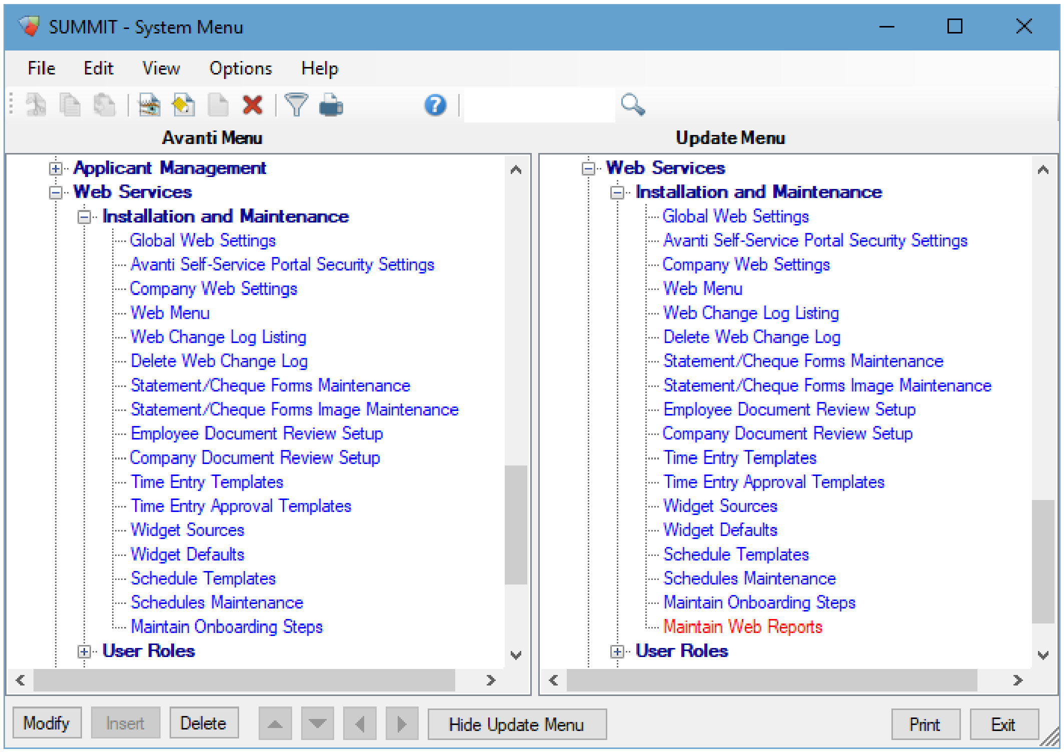
The following menu items will be available for clients with Web Services:

- Maintain Web Reports

The following menu items can be updated for clients with Web Services:

- Company Documents

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.



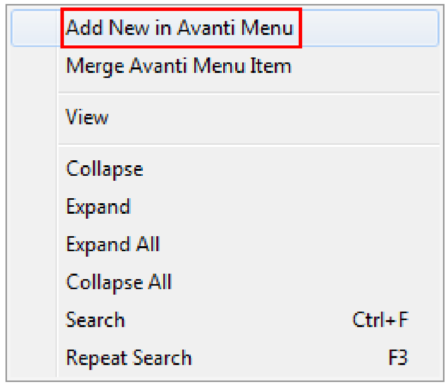
The Avanti Menu column displays all the menu items currently in your system. The Update Menu column displays the standard Avanti menu items. These menu items are colour coded for easy comparison of the menu items. Items that appear in red in the Update Menu are items that are available but are not in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

- Maintain Web Reports

For more information, please refer to Payroll Reports and Time and Attendance Reports.

The following menu items can be updated for clients with Web Services by selecting 'Merge Avanti Menu Item' instead of 'Add New in Avanti Menu':

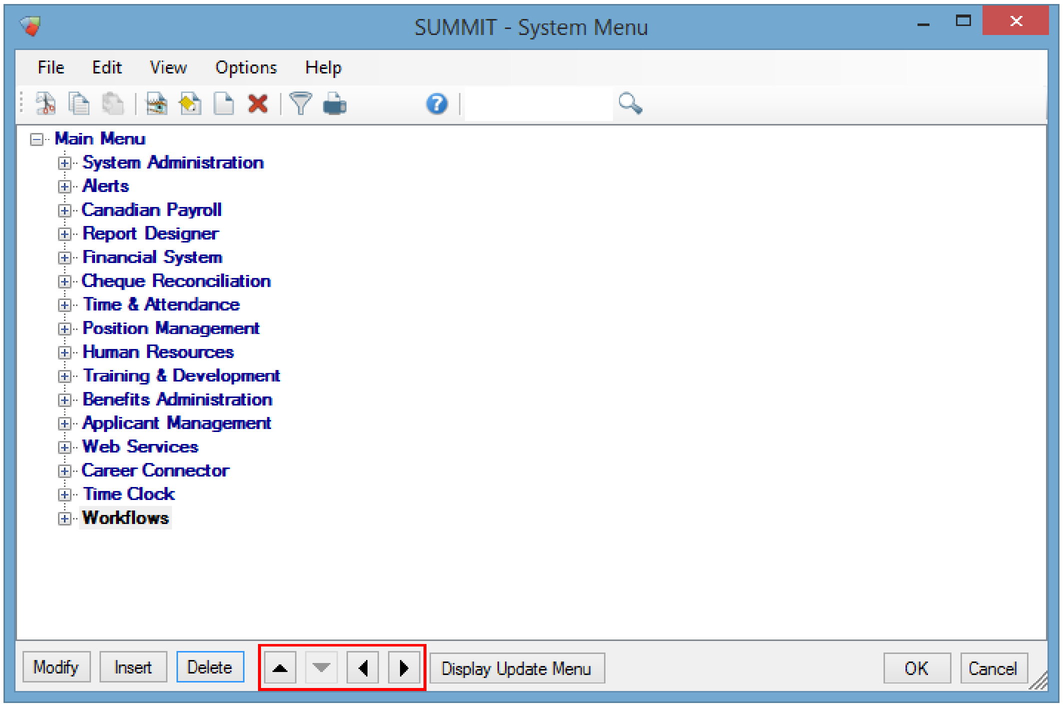
- Company Documents

For more information, please refer to Company Documents – Letter of Employment.

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 moves the highlighted menu item up on the menu.

 This moves the highlighted menu item down on the menu.

 This moves the highlighted menu item to the left on the menu.

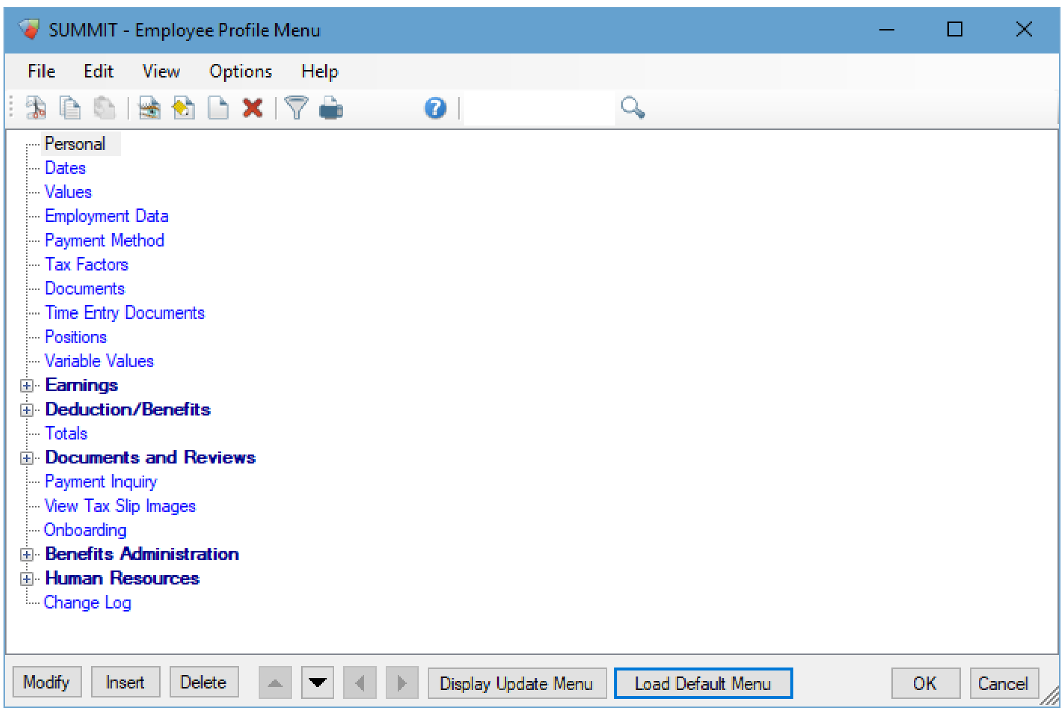
 This moves the highlighted menu item to the right on the menu.

ADD NEW EMPLOYEE PROFILE MENU ITEMS

There are no new menu items in the 9.40 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 Add And/Or update Web Service Menu Items.

'Display Update Menu' provides the ability to compare the menu items setup 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' button becomes a 'Hide Update Menu' button.

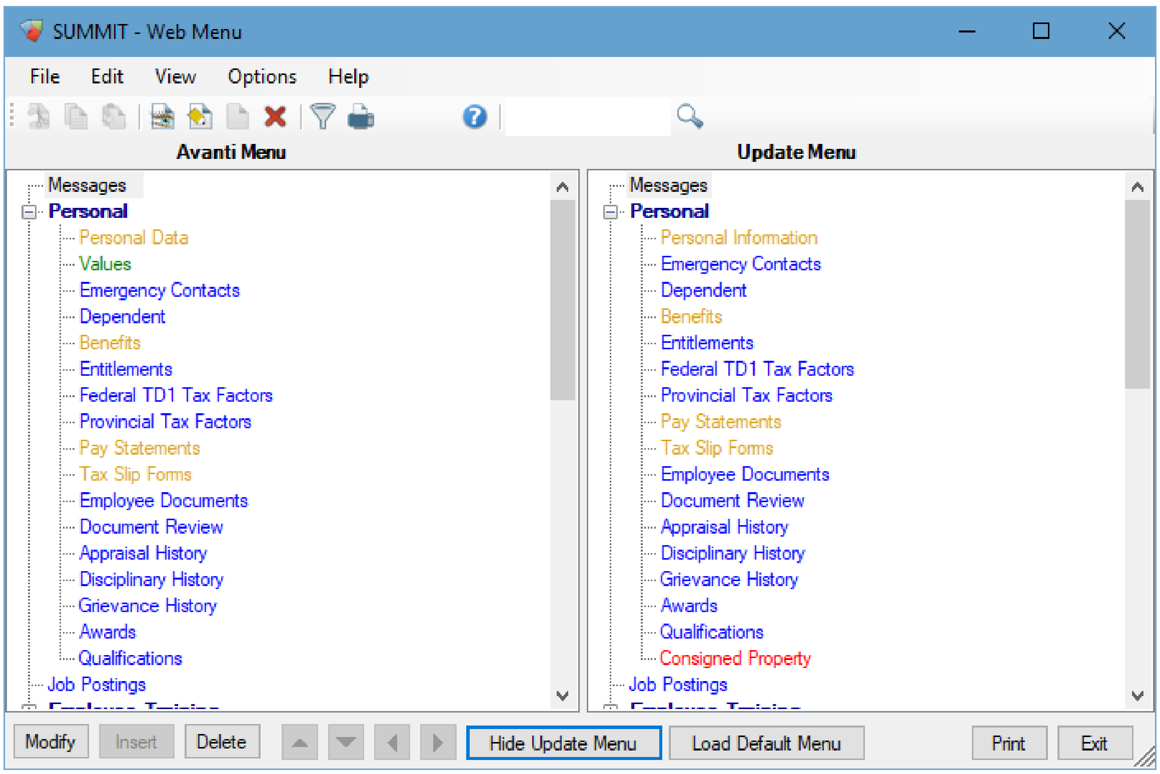
To insert one of the menu items, right-click on the Update Menu Item that should be moved to the Avanti Menu and select Add New in Avanti Menu. For a menu item to be inserted into the Avanti Menu, it must only appear in Update Menu. Menu items that only appear on the Update Menu will appear in red.



ADD AND/OR UPDATE WEB SERVICE MENU ITEMS

'Display Update Menu' provides the ability to compare the menu items setup 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 Web Services menu items are available in 9.40:

- Payroll Reports
- Role Administration

The following menu items will be available for clients with Human Resources:

- Consigned Property

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

- Time & Attendance Reports

The following Web Services are available with additional functionality in 9.40. These items can be updated by selecting 'Merge Avanti Menu Item' instead of 'Add New in Avanti Menu':

- Personal Information
- Benefits
- Pay Statements
- Tax Slip Forms
- Time Data Approval
- Attendance Calendar Approval
- Personal Info Changes

The following Web Services menu items are updated in 9.40 with additional functionality for clients with Time & Attendance: These items can be updated by selecting 'Merge Avanti Menu Item' instead of 'Add New in Avanti Menu':

- Availability Approval
- Schedule Approval
- Time Card Approval

> Prior to updating Availability Approval, please confirm that the 'If entries exist' option is set correctly. For more information, please refer to Availability Approval - 'If Entries Exist.'

Values has been removed from the Web Menu as the same information can now be displayed on Personal Information. For more information, please refer to Personal Information.

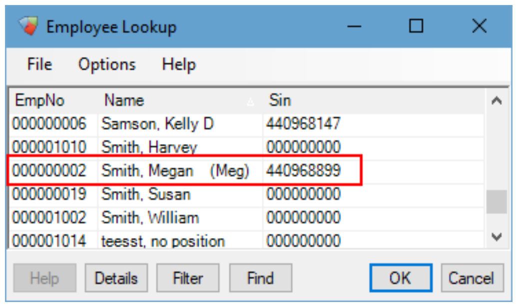
Knowledge Base has been removed from the Web Menu as it has been replaced with the new Help Center. For more information, please refer to Avanti Help Center.

SYSTEM MODIFICATIONS

PREFERRED NAME

Benefits: Aids the identification of the correct employee.

An employee's preferred name can now be displayed in brackets on employee dropdowns throughout Avanti.

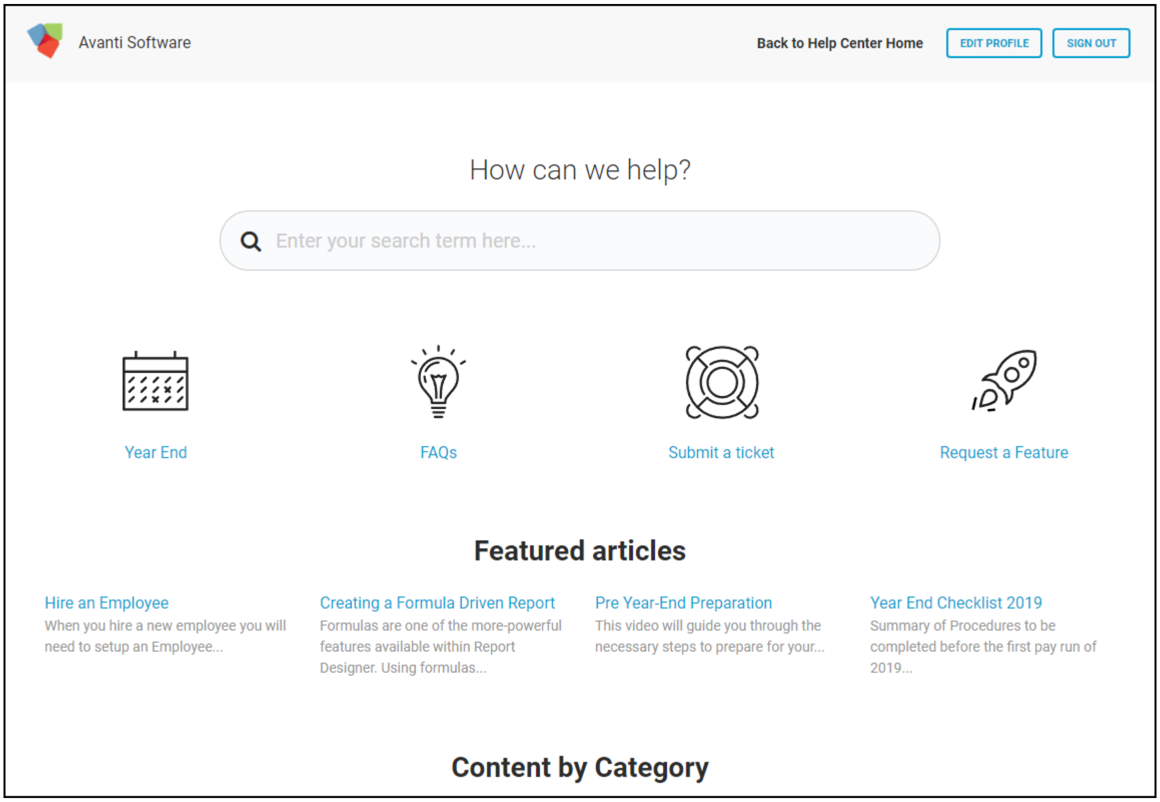


> This setting will not affect the display of employee names on the Avanti Self-Service Portal.

To display employee's preferred name, update the value to Y for Program Option Py.EmployeeLookup.ShowPreferredName. This can be updated in System Administration >> System Parameters >> Program Options.

AVANTI HELP CENTER

Our help center has moved! Our new help center can be accessed from help.avanti.ca.

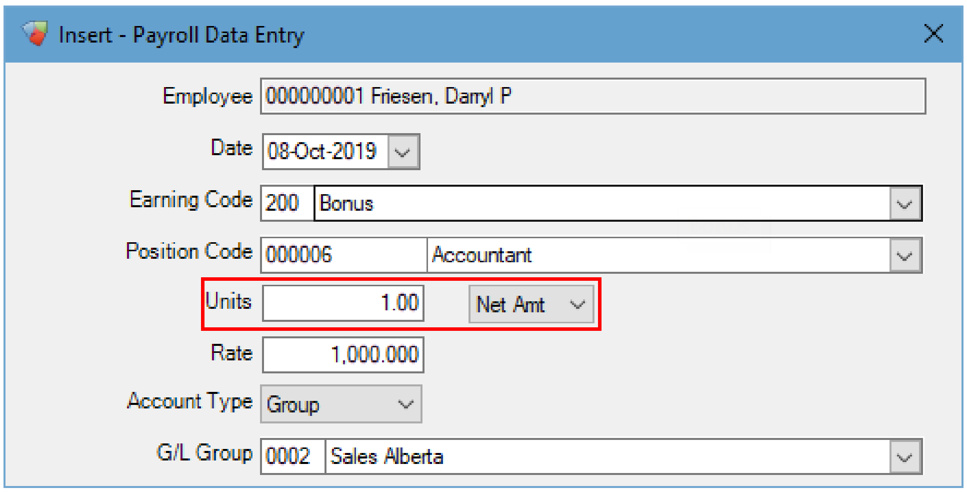


CANADIAN PAYROLL

NET PAY

Benefits: Enter the amount the employee will be paid after taxes and deductions.

'Net Amt' has been added to Payroll Data Entry and Attendance Calendar. When this is selected, the amount entered will be the amount the employee is paid. The gross earning will be calculated during payroll processing to take into account taxes and deductions.



This will only be available on the Avanti Application.

Setup

The allowed variance from the net amount can be specified, providing a range that the employee can be paid. By default, the net pay will match the amount entered.

To update the variance, enter the allowed variance amount in Py.Paycal.AllowableGrossDiff. This can be updated in System Administration >> System Parameters >> Program Options.

Performance issues may arise from having a precise variance.

REPORT DESIGNER

REPORT DEFINITION – NEW REPORT SOURCES

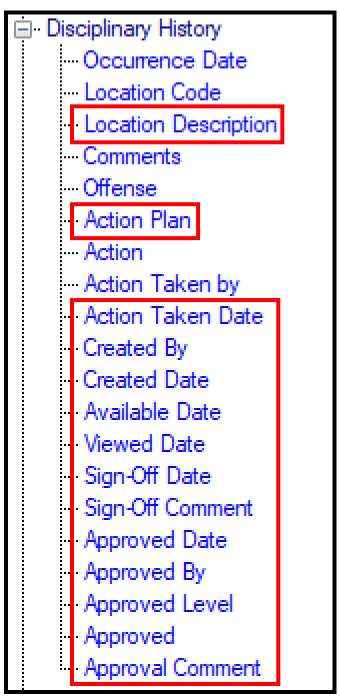
Only applicable to clients with Human Resources. Clients who do not have Human Resources can skip to Applicant Management.

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

Clients with Human Resources:

- Disciplinary History >> Location Description
- Disciplinary History >> Action Plan
- Disciplinary History >> Action Taken Date
- Disciplinary History >> Created By
- Disciplinary History >> Created Date
- Disciplinary History >> Available Date
- Disciplinary History >> Viewed Date
- Disciplinary History >> Sign-Off Date
- Disciplinary History >> Sign-Off Comment
- Disciplinary History >> Approved Date
- Disciplinary History >> Approved By
- Disciplinary History >> Approved Level
- Disciplinary History >> Approved
- Disciplinary History >> Approval Comment

Offence, Action, Action Taken By, and Action Taken Date will appear in a comma-separated list when there are multiple values in the discipline entry.



APPLICANT MANAGEMENT

Only applicable to clients with Applicant Management and Benefits Administration. Clients who do not have both these modules can skip to Human Resources.

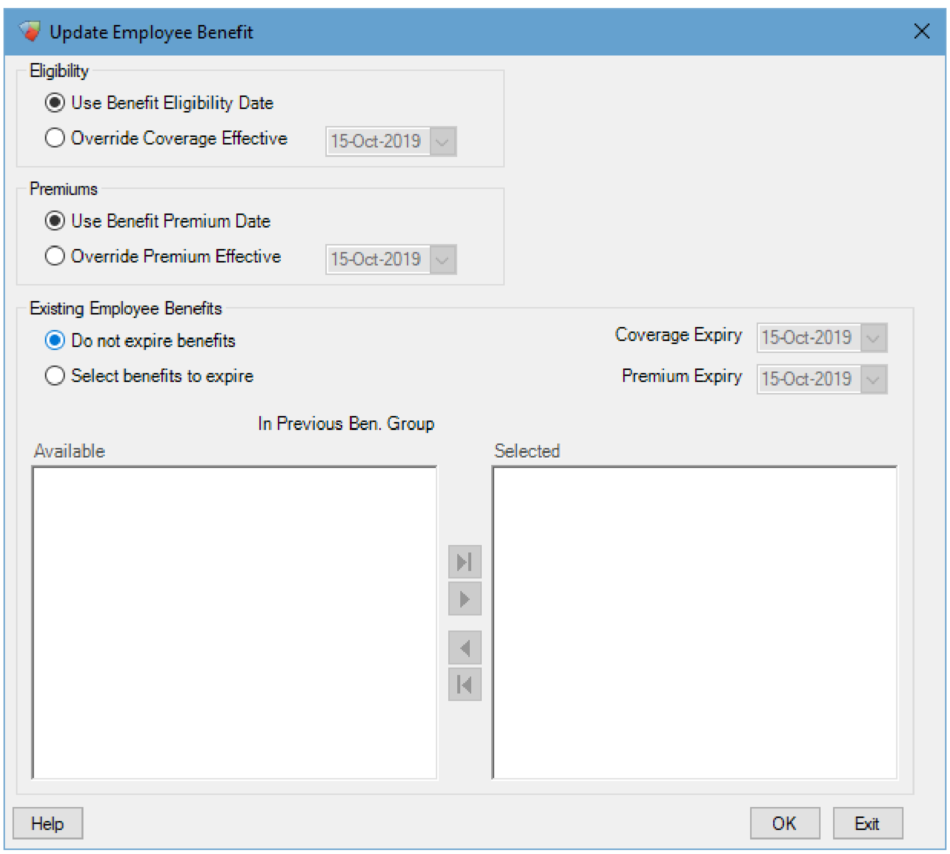
UPDATE BENEFITS ON APPLICANT HIRE

Benefits: The benefits from the Benefit Group will be added to the Employee Profile once an applicant is hired.

If a Benefit Group is selected when hiring an applicant using Applicant Hire, Update Employee Benefits will now be available. This will:

- Set the benefit eligibility date.
- Set the benefit premium date.
- Expire existing employee benefits if the applicant was previously employed by the company.

Employee Benefits can be updated once all the employment information, including a Benefit Group, is entered on Applicant Hire and Ok is selected. Update Employee Benefits will appear similar to the following:



CAREER CONNECTOR

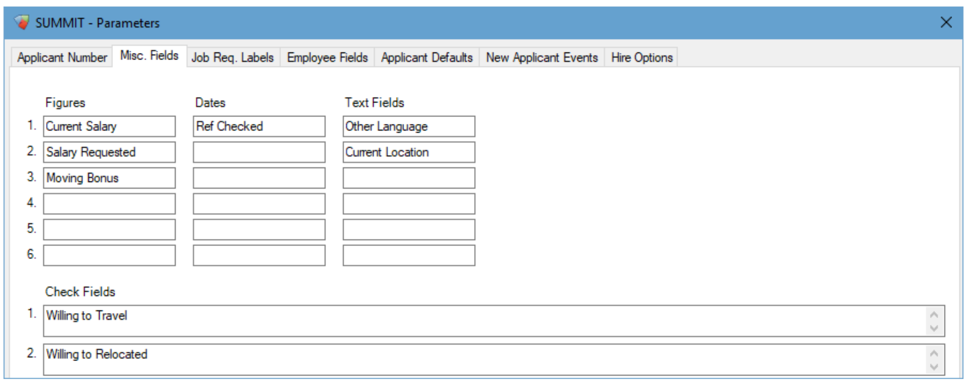
Only applicable to clients with Applicant Management who are using Career Connector. Clients who are not using Career Connector can skip to Human Resources.

ADD FIGURES, DATES, TEXT FIELDS AND CHECK FIELDS TO CAREER CONNECTOR

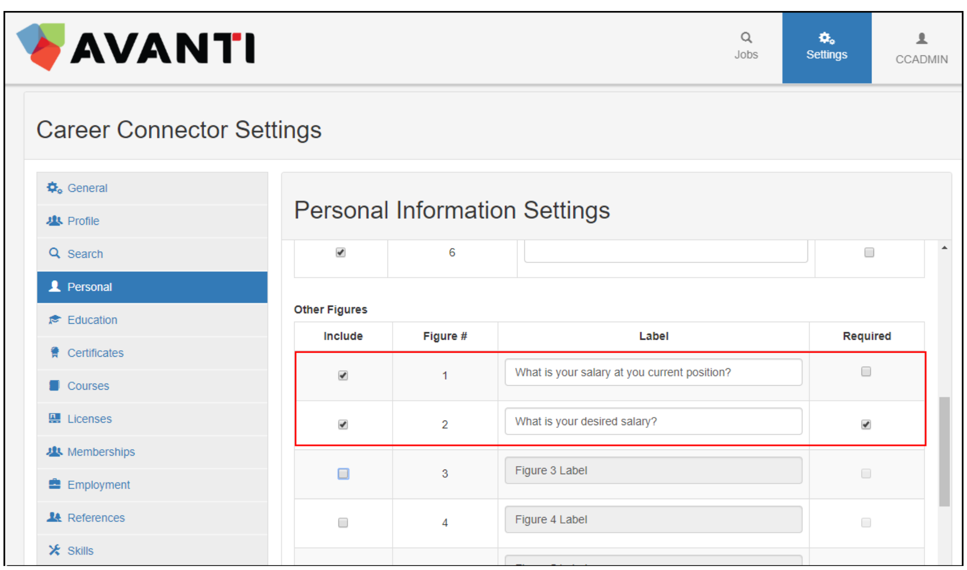
Benefits: Helps determine whether applicants meet the job requirements.

Figures, Dates, Text Fields, and Check Fields can now be added for applicants to answer when applying for a position and updating their Profile on Career Connector. These can be optional or required. By default, these fields will not be available on Career Connector.

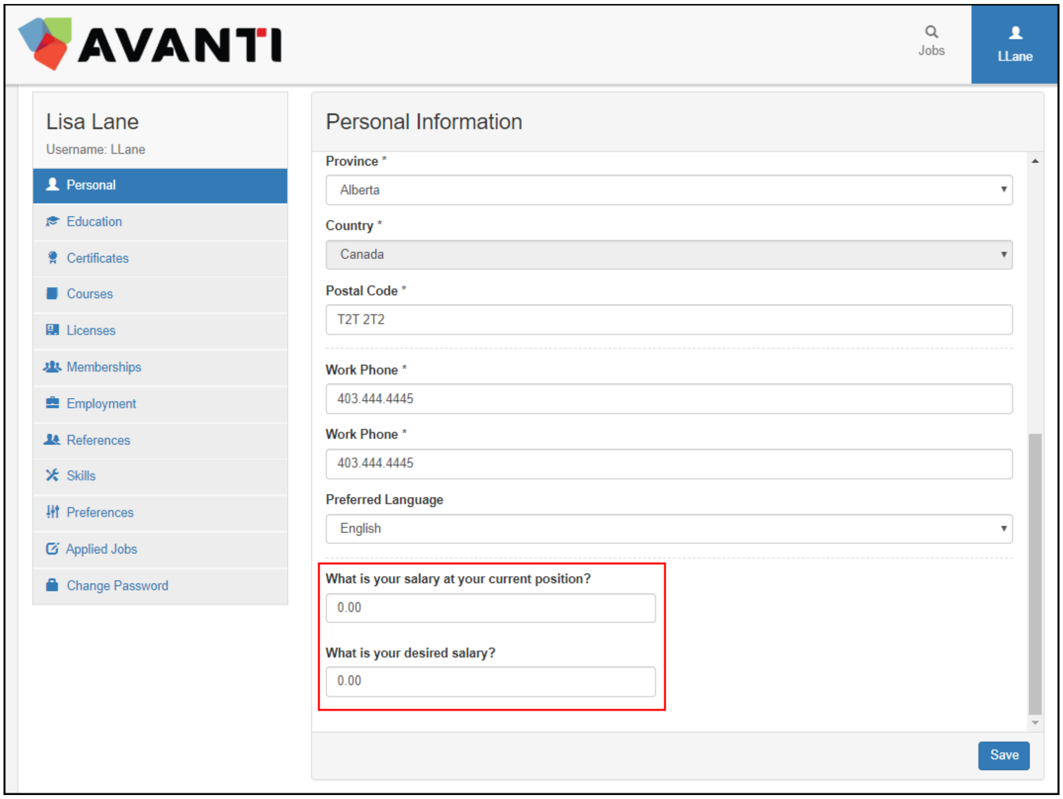
To include these fields, they must be setup on the Misc. Fields tab of the Applicant Management Parameters. After changes are made, 'Synchronize with Career Connector' must be run.



To display on Career Connector, select 'Include' for the fields on the Personal Information section of Career Connector Settings. Once 'Include' is selected, enter the label for the field and whether the field is required.



Once the settings are saved, the fields will be available on the Personal section when applying and on the Profile.



Additionally, the Check Fields labels can now be up to 1024 characters in length. These are defined on Misc. Fields tab of the Applicant Management Parameters. On the Applicant Profile, these fields now appear beneath Employee on the Employment Data tab to accommodate the increased size.

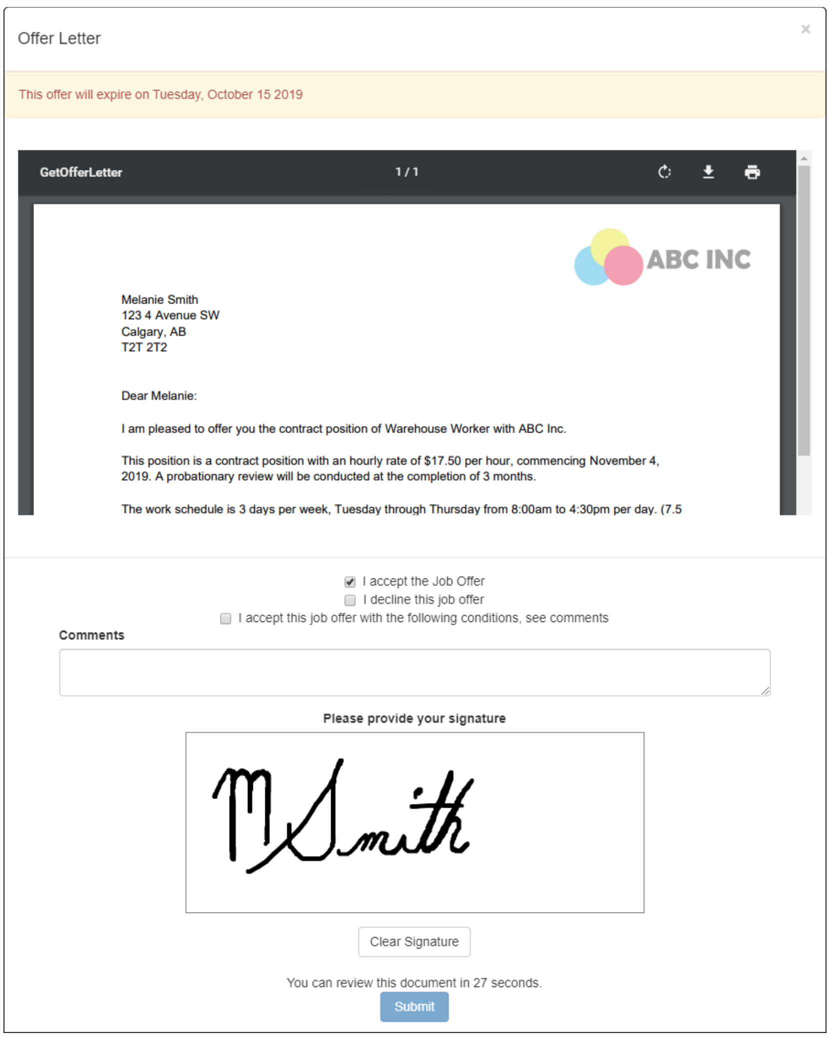
JOB OFFER – SIGNATURES, REVIEW MESSAGES, TIME BEFORE SIGN-OFF & SIGN-OFF CERTIFICATES

Only applicable to clients with Web Services who are using Career Connector. Clients who do not have these can skip to Human Resources.

Job offers on Career Connector can now have a document review setup which provides the ability to setup the following:

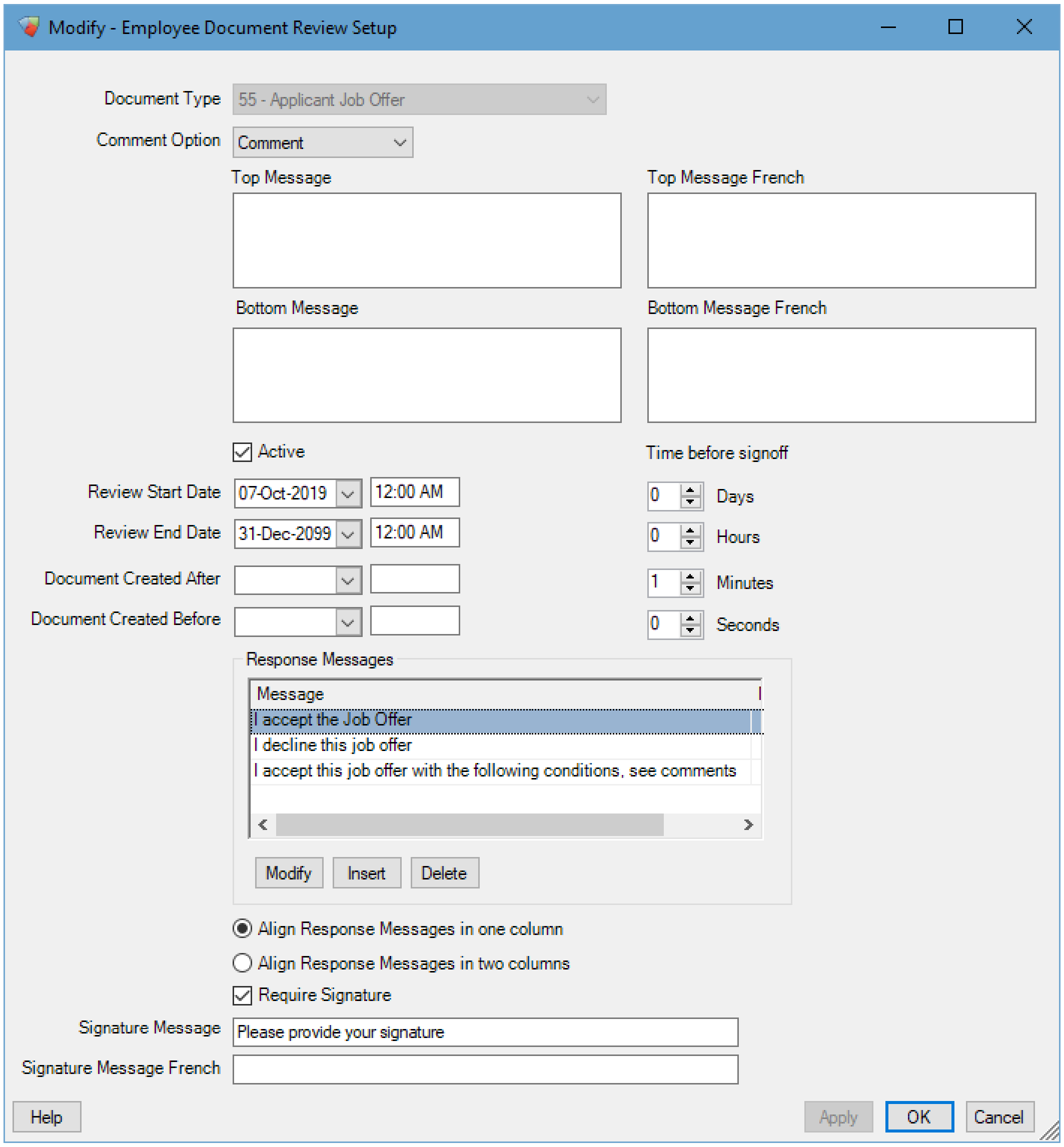
- Additional Messages Above and Below the Offer Letter
- Require Comments
- Response Options
- Time Before Sign-off
- Require Signature
- Viewed Date
- Document Hashes
- Sign-off Certificate

By default, a document review is not setup for job offers, and it will continue to have the options to either accept or decline, with the ability to enter optional comments.



Setup
To setup a document review for Job Offers, create an employee document review for Document Type 55 in Web Services >> Installation and Maintenance >> Employee Document Review Setup.

For more information on Employee Document Review Setup, please refer to the Web Services Reference Manual.



HUMAN RESOURCES

Only applicable to clients with Human Resources. Clients who do not have Human Resources can skip to Time & Attendance.

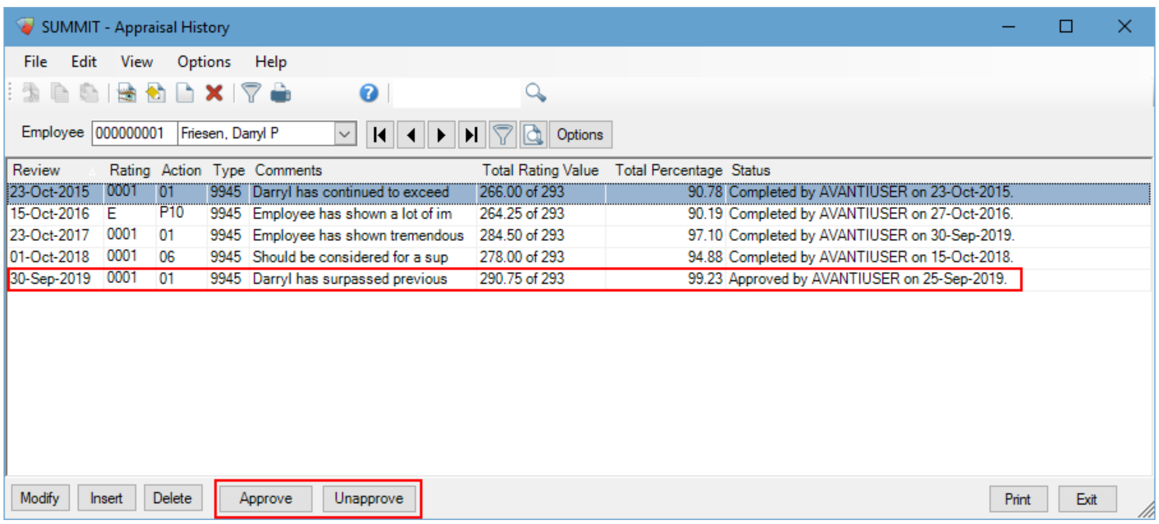
APPROVING APPRAISALS

Benefits: Provides the ability to finalize appraisals, preventing some or all users from making changes to entries.

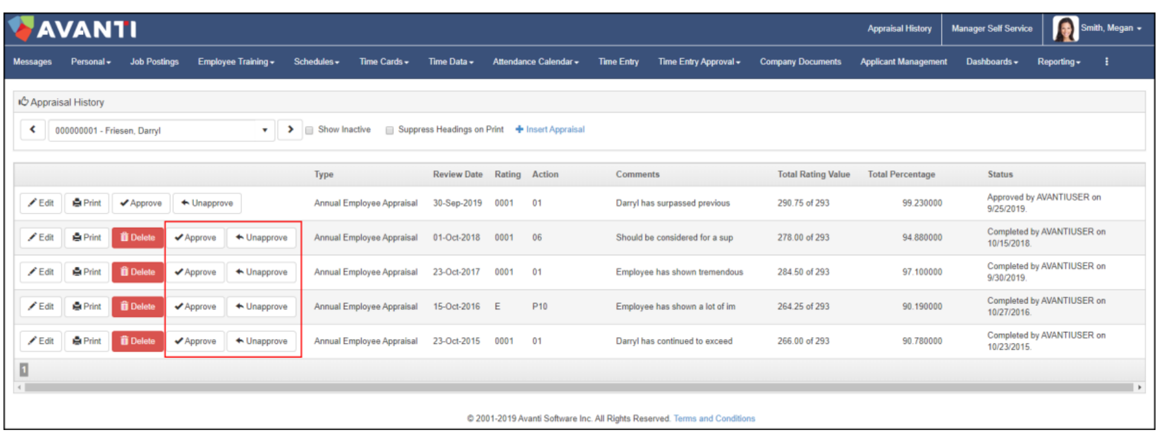
Appraisals can now be approved. Appraisal Approval can be setup so users can continue to update their own approved appraisals, or no one can update the approved appraisals.

Once an appraisal is approved, the user that approved the appraisal and the date the appraisal was approved will be displayed in the status. By default, appraisals cannot be approved.

Appraisal Approval in Avanti appears similar to the following:



Appraisal Approval in Avanti Self-Service Portal appears similar to the following:



Setup: Allow Employees to Update Approved Appraisals
To enable Appraisal Approval so employees can update their approved appraisals, but no one else can update them, enter False for Hr.AppraisalHistory.ModifyApprovedRestricted and True for Hr.AppraisalHistory.AllowApproval.

These can be updated in System Administration >> System Parameters >> Program Options.

Setup: Prevent Modification of Approved Appraisals
To enable Appraisal Approval where no one can update approved appraisals, enter True for Hr.AppraisalHistory.ModifyApprovedRestricted and Hr.AppraisalHistory.AllowApproval.

These can be updated in System Administration >> System Parameters >> Program Options.

Additional Setup on the Avanti Self-Service Portal
Only applicable to clients with Web Services. Clients without Web Services can skip to Approving Disciplinary History Entries.

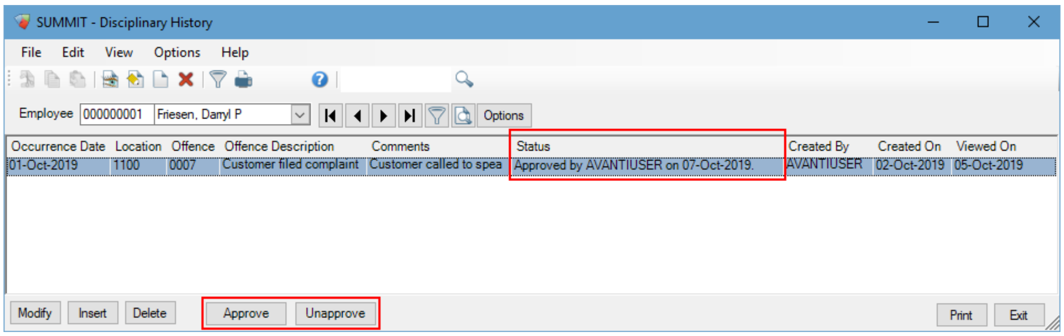
Once these settings are updated, select ‘Reload Settings’ in Administration >> Administration Settings on the Avanti Self-Service Portal.

APPROVING DISCIPLINARY HISTORY ENTRIES

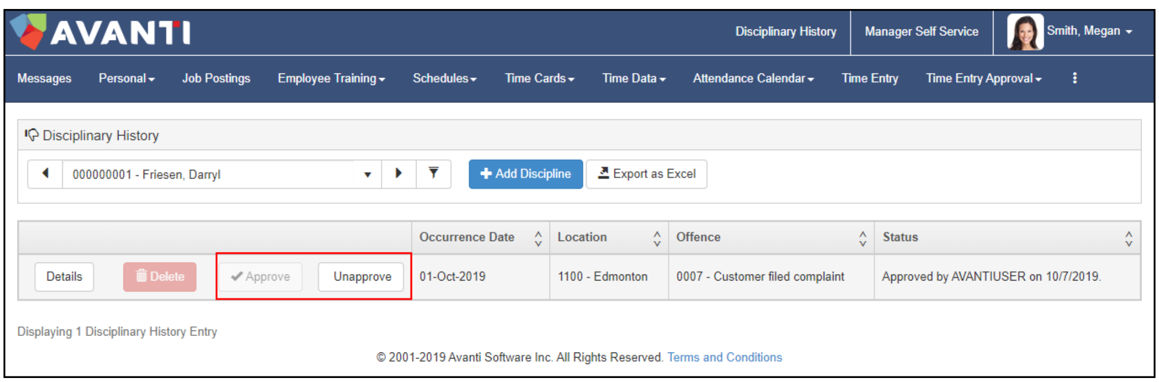
Benefits: Provides the ability to finalize disciplinary entries and prevent users from making changes.

Disciplinary Entries can now be approved, which will prevent users from updating the entry. Once approve is selected, the Date and User that approved the entry will be displayed in the status. By default, disciplinary entries cannot be approved.

Disciplinary Approval in Avanti appears similar to the following:



Disciplinary Approval in Avanti Self-Service Portal appears similar to the following:



To enable Disciplinary Approval, enter True for Hr.MtEmpDisciplinaryHistory.UseApprovals in System Administration >> System Parameters >> Program Options.

Additional Setup on the Avanti Self-Service Portal

Only applicable to clients with Web Services. Clients without Web Services can skip to Time & Attendance.

Once these settings are updated, select ‘Reload Settings’ in Administration >> Administration Settings on the Avanti Self-Service Portal.

TIME & ATTENDANCE

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

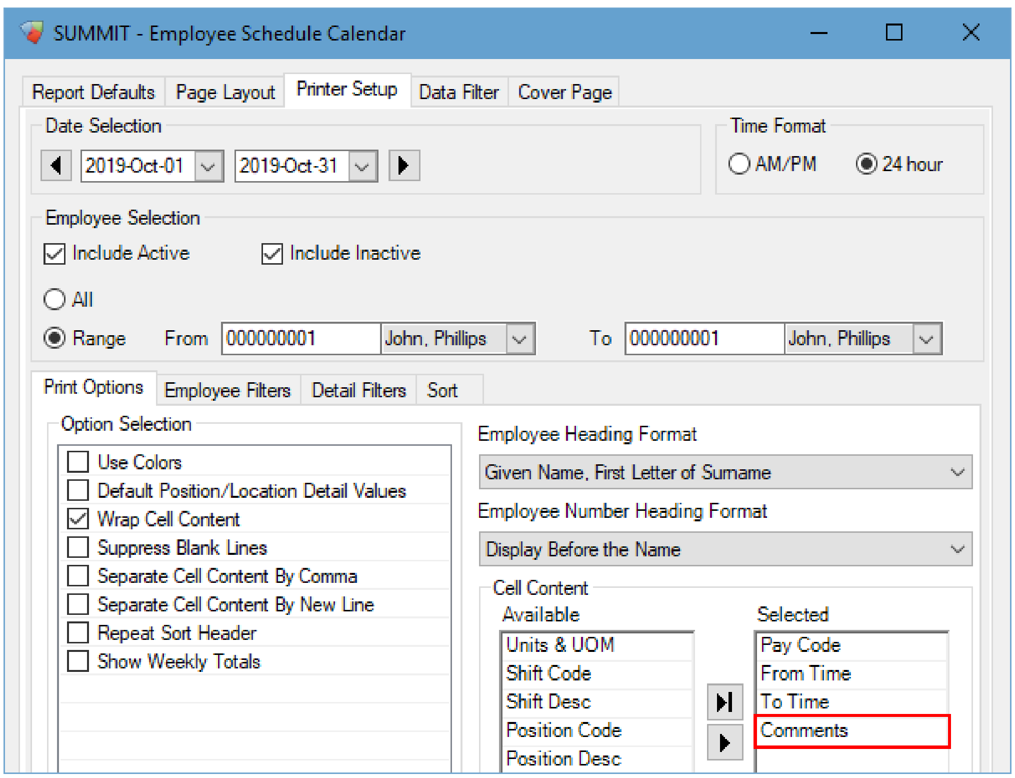
COMMENTS ON EMPLOYEE SCHEDULE CALENDAR AND SCHEDULE CALENDAR

Comments can now be included in the following reports:

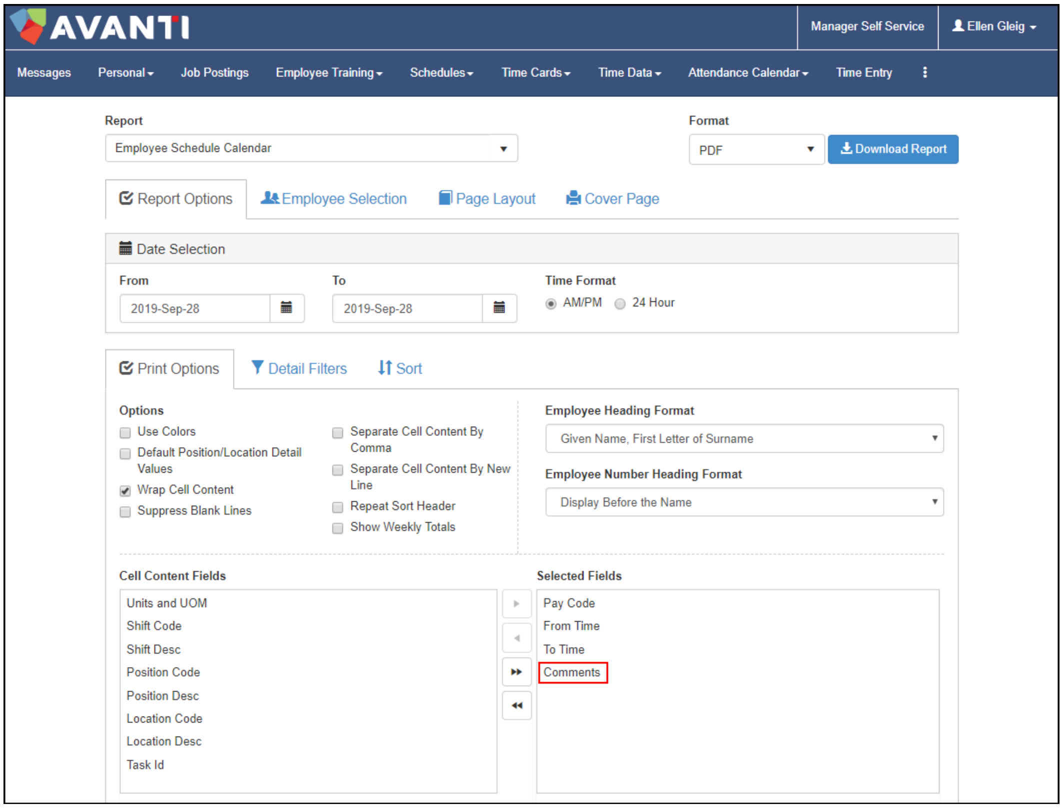
- Employee Schedule Calendar
- Schedule Calendar

To include comments in the report, select Comments for Cell Content on the Report Defaults tab.

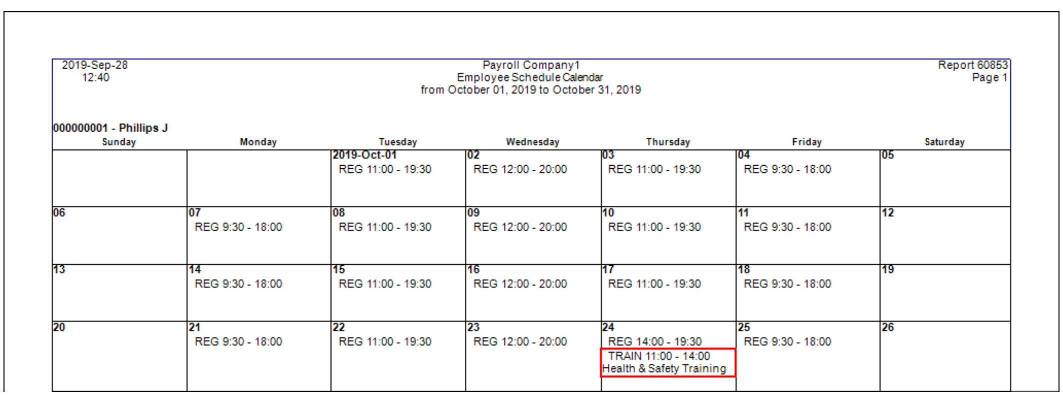
> Select 'Wrap Cell Content' in Print Options to ensure the entire comment will be displayed



The Report Defaults on the Avanti Self-Service Portal appears similar to the following:



When printed, Cell Content will appear similar to the following:



2019-Sep-28
12:40

Payroll Company1
Employee Schedule Calendar
from October 01, 2019 to October 31, 2019

Report 60853
Page 1

000000001 - Phillips J

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		2019-Oct-01 REG 11:00 - 19:30	02 REG 12:00 - 20:00	03 REG 11:00 - 19:30	04 REG 9:30 - 18:00	05
06	07 REG 9:30 - 18:00	08 REG 11:00 - 19:30	09 REG 12:00 - 20:00	10 REG 11:00 - 19:30	11 REG 9:30 - 18:00	12
13	14 REG 9:30 - 18:00	15 REG 11:00 - 19:30	16 REG 12:00 - 20:00	17 REG 11:00 - 19:30	18 REG 9:30 - 18:00	19
20	21 REG 9:30 - 18:00	22 REG 11:00 - 19:30	23 REG 12:00 - 20:00	24 REG 14:00 - 19:30 TRAIN 11:00 - 14:00 Health & Safety Training	25 REG 9:30 - 18:00	26

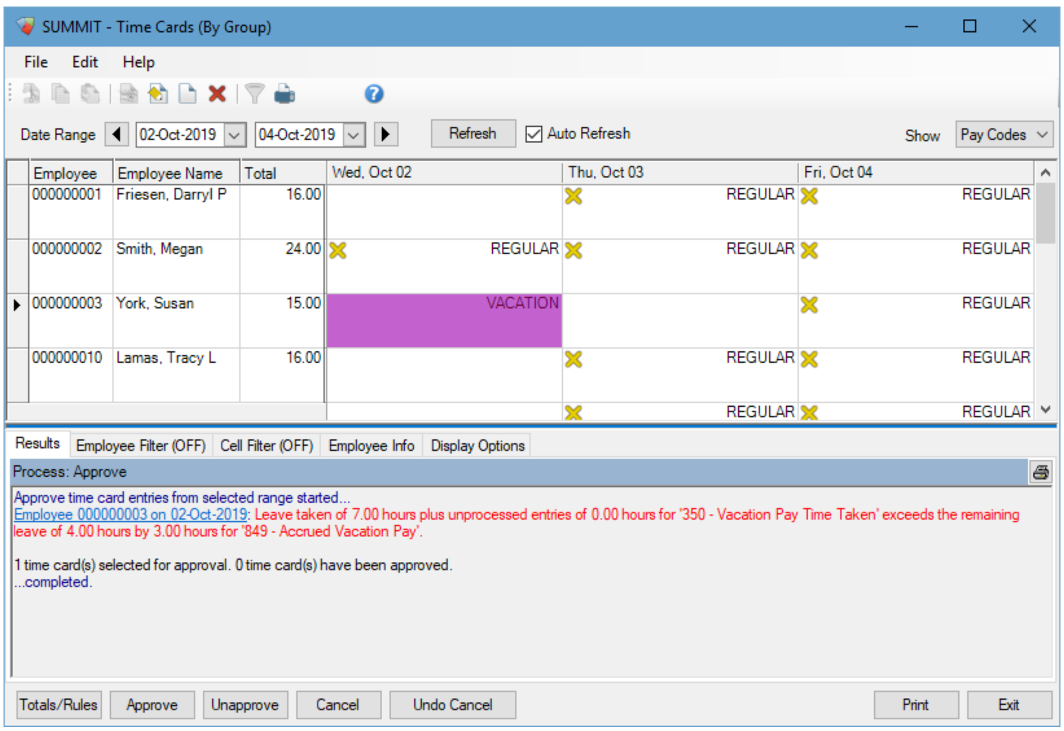
TIME CARDS - ENTITLEMENT THRESHOLDS ON APPROVAL

Benefits: Prevent entitlements that exceed the accrued leave from being approved.

Avanti now provides the ability to display a warning or prevent entitlement entries that exceed the remaining unit threshold from being approved on Time Cards in Avanti.

By default, a warning message will be displayed on approval when an entry results in negative remaining units for a leave entitlement.

> This will not impact entitlement validation on the Avanti Self-Service Portal.



Setup

An Entitlement threshold can be setup in System Administration >> System Parameters >> Program Options.

- To approve entries and display a message when the threshold is exceeded, enter Warning for the value of Tc.TimeCard.EntitlementValidationType.
- To prevent entitlement entries from being approved when the threshold is exceeded, enter Error for the value of Tc.TimeCard.EntitlementValidationType.
- Specify the threshold, in Units, that the Remaining Units of the entitlement cannot fall below in Tc.TimeCard.EntitlementValidationThreshold. This should either be zero or less.

WEB SERVICES

Only applicable to clients with Web Services.

PERSONAL INFORMATION

Benefits: Personal Data can now be updated to only display the information relevant to your organization. Additionally, figures and dates can now be displayed.

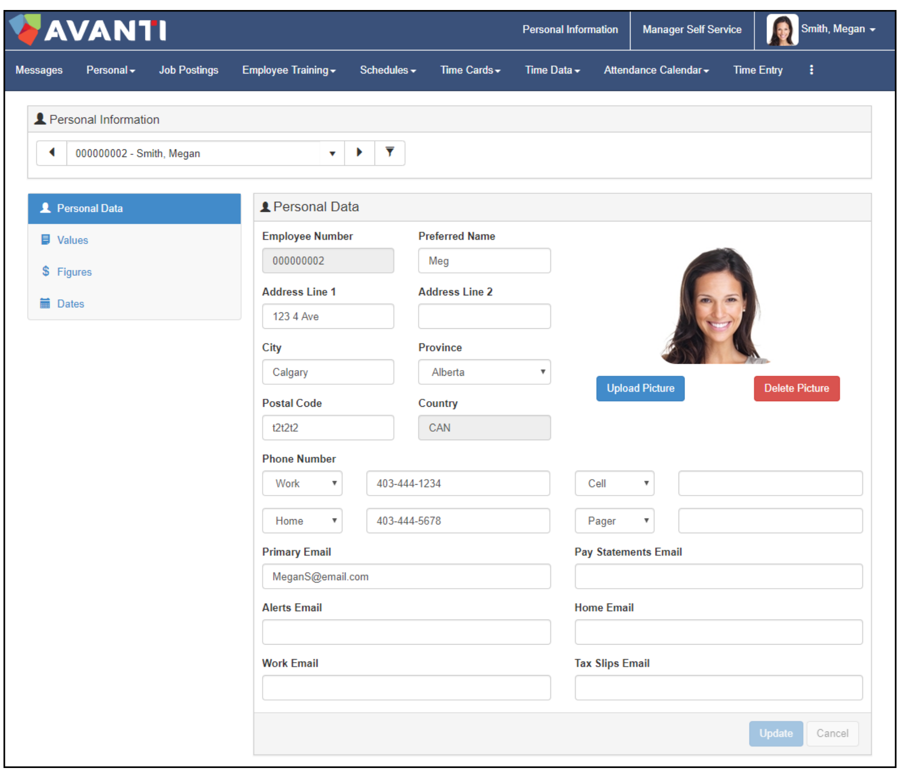
Personal Data and Values are now combined and are available as Personal Information on the Avanti Self-Service Portal. In addition to having a more modern appearance, the new interface provides the ability to select which fields will be displayed and can be modified. Additionally, user-defined Dates and Figures can now be included.

Personal Data provides the ability for the employee to view their personal information. By default, all personal data fields are visible and can be modified by all users.

Values, Figures, and Dates provide employees with the ability to view, modify, and save the fields defined in Canadian Payroll >> Installation & Maintenance >> Payroll Parameters >> Profile Field Names. By default, these sections will not be displayed as no fields are displayed by default. Additional configuration will need to be completed to display these sections.

To use the new user interface, the menu item on the Web Menu will need to be updated. For more information, please refer to the Add New Web Service Menu Items.

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



BENEFITS

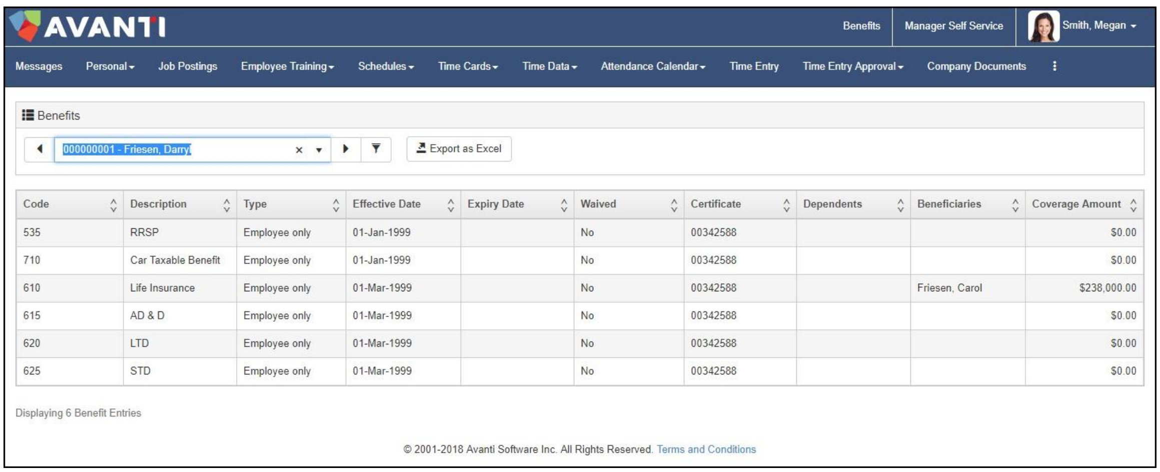
Only applicable to clients with Benefits. Clients who do not have Time & Attendance can skip to [Pay Statements](#).

Benefits: Benefits can now be updated to only display the information relevant to your organization.

Benefits on the Avanti Self-Service Portal has a new user interface. In addition to providing a better user experience, the new interface provides the ability to select the columns displayed and rename the column headings. Additionally, you can determine whether Benefits are displayed before they are effective and after they are expired.

To use the new user interface, the menu item on the Web Menu will need to be updated. For more information, please refer to the Add New Web Service Menu Items.

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



Code	Description	Type	Effective Date	Expiry Date	Waived	Certificate	Dependents	Beneficiaries	Coverage Amount
535	RRSP	Employee only	01-Jan-1999		No	00342588			$0.00
710	Car Taxable Benefit	Employee only	01-Jan-1999		No	00342588			$0.00
610	Life Insurance	Employee only	01-Mar-1999		No	00342588		Friesen, Carol	$238,000.00
615	AD & D	Employee only	01-Mar-1999		No	00342588			$0.00
620	LTD	Employee only	01-Mar-1999		No	00342588			$0.00
625	STD	Employee only	01-Mar-1999		No	00342588			$0.00

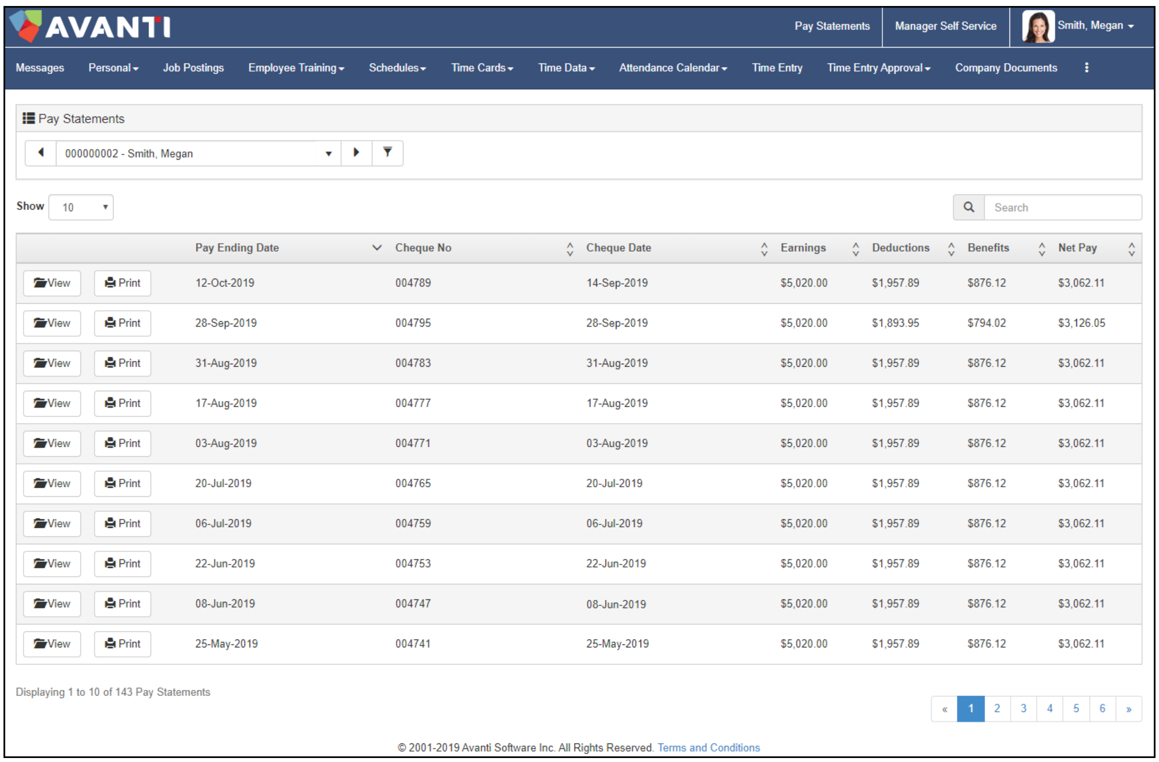
PAY STATEMENTS

Benefits: Pay Statements can now be updated to only display the information relevant to your organization.

Pay Statements now has a new interface on the Avanti Self-Service Portal. In addition to having a more modern appearance, the new interface provides the ability to select the columns displayed and rename the column headings.

To use the new user interface, the menu item on the Web Menu will need to be updated. For more information, please refer to the [Add New Web Service Menu Items](#).

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



		Pay Ending Date	Cheque No	Cheque Date	Earnings	Deductions	Benefits	Net Pay
View	Print	12-Oct-2019	004789	14-Sep-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	28-Sep-2019	004795	28-Sep-2019	$5,020.00	$1,893.95	$794.02	$3,126.05
View	Print	31-Aug-2019	004783	31-Aug-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	17-Aug-2019	004777	17-Aug-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	03-Aug-2019	004771	03-Aug-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	20-Jul-2019	004765	20-Jul-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	06-Jul-2019	004759	06-Jul-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	22-Jun-2019	004753	22-Jun-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	08-Jun-2019	004747	08-Jun-2019	$5,020.00	$1,957.89	$876.12	$3,062.11
View	Print	25-May-2019	004741	25-May-2019	$5,020.00	$1,957.89	$876.12	$3,062.11

TAX SLIP FORMS

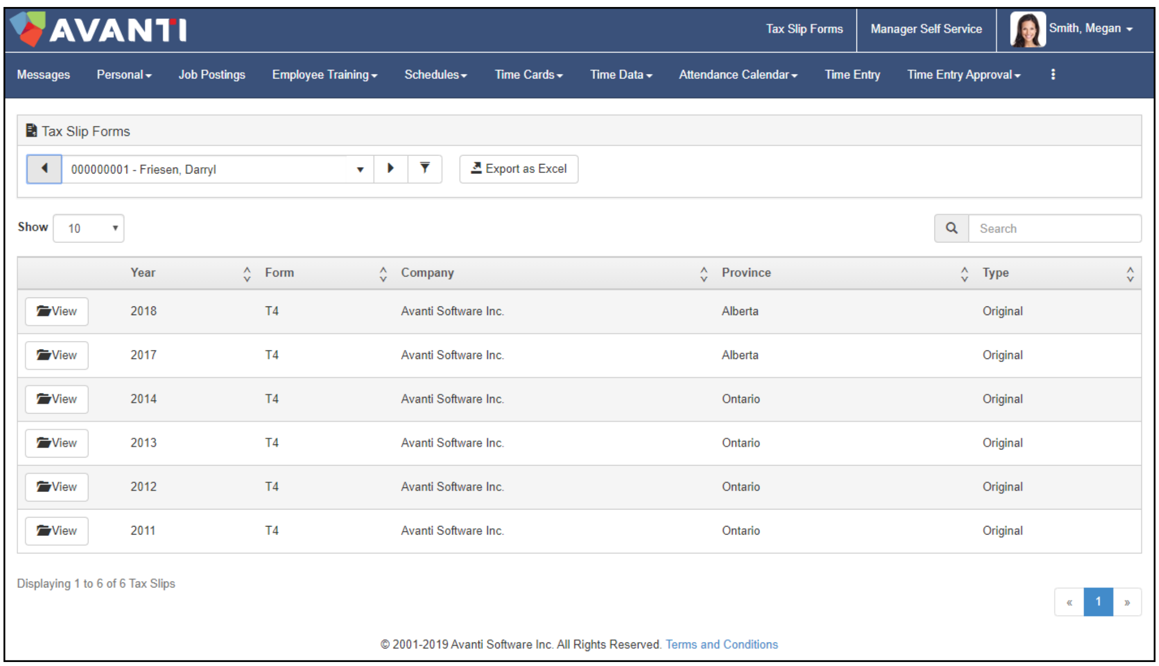
Benefits: Tax Forms can now be updated to only display the information relevant to your organization.

Tax Slip Forms now has a new interface on the Avanti Self-Service Portal. In addition to having a more modern appearance, the new interface provides the ability to select the columns displayed and rename the column headings.

T4's can now be delivered electronically without having to obtain consent from the employee, as per the Budget Implementation Act, 2017. As employee consent is no longer required, the Tax Slip Consent message previously displayed has been removed.

To use the new user interface, the menu item on the Web Menu will need to be updated. For more information, please refer to the Add New Web Service Menu Items.

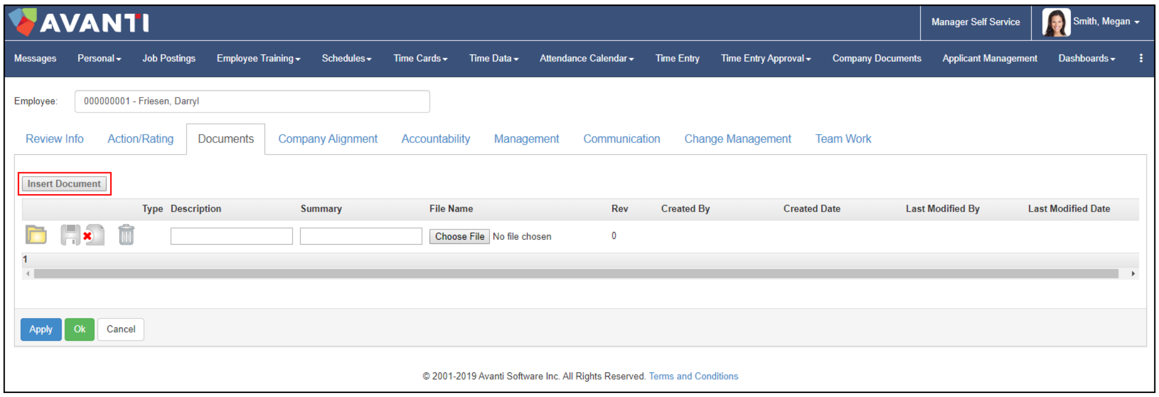
For more information on configuration, please refer to the Web Services Reference Manual.



APPRAISALS – INSERT DOCUMENTS

Only applicable to clients with Human Resources. Clients who do not have Human Resources can skip to Qualifications.

Documents can now be added to appraisals on the Avanti Self-Service Portal. Only managers and regular users will have the ability to insert documents for appraisals for other employees. Users will not be able to upload documents for their own employees.



By default, Insert Documents is not enabled on Appraisal History.

Setup

To enable, select True for WebAppraisalHistory.AllowedDocumentUpload on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal.

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

> Prior to enabling Insert Documents on Appraisal History, please ensure that antivirus is setup for the Avanti Self-Service Portal.
>
> For more information on configuring antivirus, please refer to the Web Service Installation Manual.

DISCIPLINARY SIGN-OFF

Only applicable to clients with Human Resources. Clients who do not have Human Resources can skip to Qualifications.

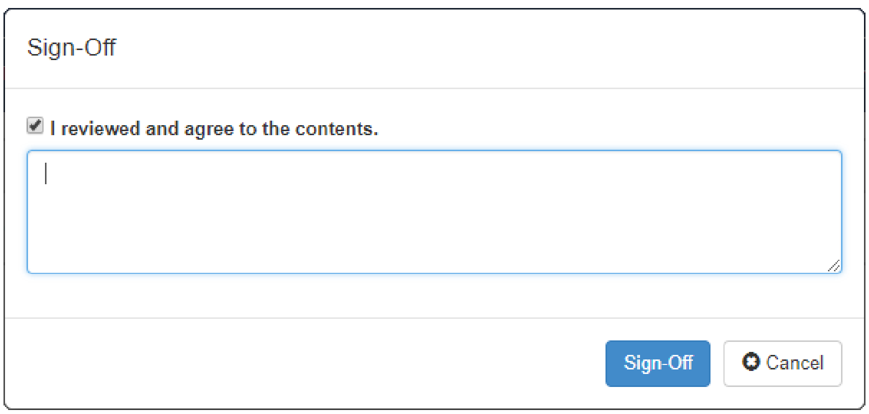
Benefits: Have employees acknowledge disciplinary records.

Disciplinary sign-off is available on the Avanti Self-Service Portal to provides the ability for employees to acknowledge disciplinary entries after viewing them. By default, sign-off will not be enabled on disciplinary entries.

When the employee with the disciplinary entry selects Details, the disciplinary history entry will be displayed. Once the entry is closed, the sign-off will be displayed. The employee can include comments, but they are not required.

The sign-off will only be displayed if the employee has not completed a sign-off for the entry.

When sign-off is enabled, it will appear similar to the following:



Setup

To enable disciplinary sign-off, enter True for Hr.MtEmpDisciplinaryHistory.UseSignOff in System Administration >> System Parameters >> Program Options.

Enter message that will displayed beside the sign-off checkbox in the value for Hr.MtEmpDisciplinaryHistory.SignOffMessage in System Administration >> System Parameters >> Program Options.

Once these settings are updated, select 'Reload Settings' in Administration >> Administration Settings on the Avanti Self-Service Portal.

QUALIFICATIONS – RESTRICT BY USER CLASS

Only applicable to clients with Training & Development. Clients who do not have Training & Development can skip to Consigned Property.

Benefits: Allow view-only access to qualifications to users based on User Class.

You can now restrict insert, edit, and delete access to qualifications on the Avanti Self-Service Portal for the following:

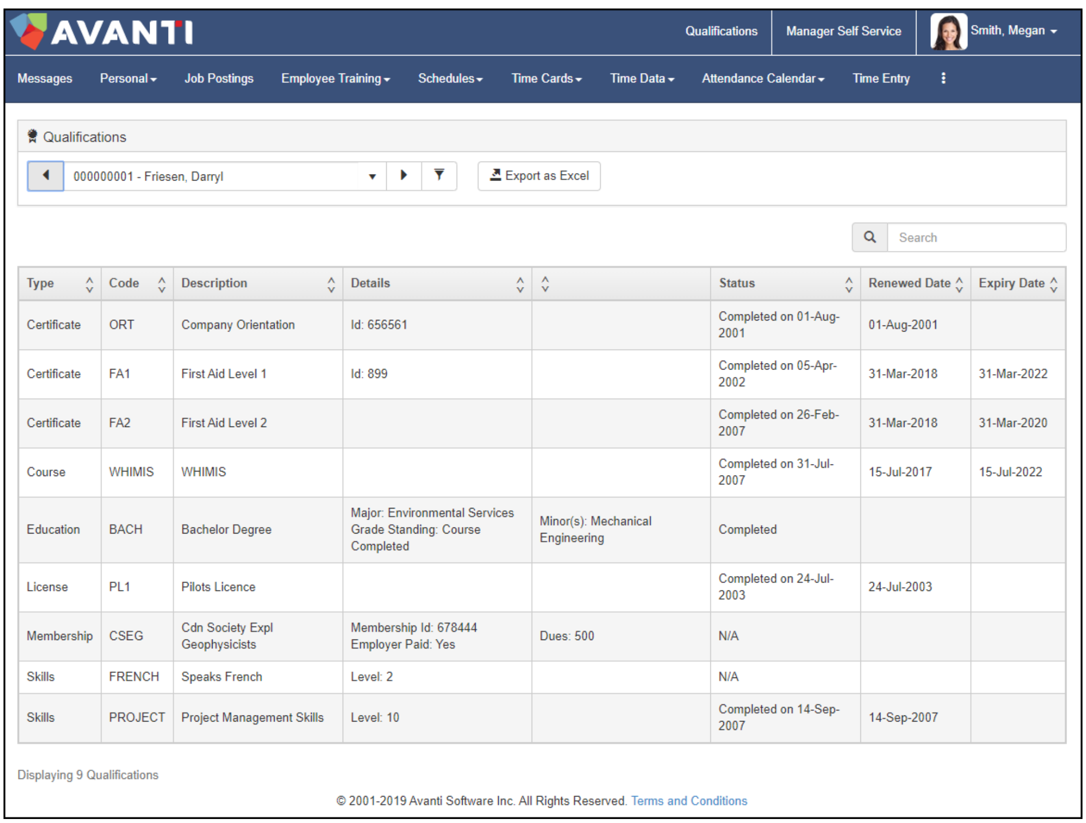
- Employees
- Manager and regular users accessing other employees
- Manager and regular users accessing their own employee

User Class is set for a User in System Administration >> System Access Controls >> Avanti Users.

In addition to these permissions, qualification will continue to restrict the ability to view, insert, edit, and delete qualifications is based on the responsibilities set on the Web Menu and Subfunction Access Controls. Additionally, this access to courses can also be restricted based on the Course Type.

By default, all users will have access to qualifications based on user class.

Qualifications will appear similar to the following when the user doesn't have access to insert, modify, or delete qualifications:



Type	Code	Description	Details		Status	Renewed Date	Expiry Date
Certificate	ORT	Company Orientation	Id: 656561		Completed on 01-Aug-2001	01-Aug-2001	
Certificate	FA1	First Aid Level 1	Id: 899		Completed on 05-Apr-2002	31-Mar-2018	31-Mar-2022
Certificate	FA2	First Aid Level 2			Completed on 26-Feb-2007	31-Mar-2018	31-Mar-2020
Course	WHIMIS	WHIMIS			Completed on 31-Jul-2007	15-Jul-2017	15-Jul-2022
Education	BACH	Bachelor Degree	Major: Environmental Services Grade Standing: Course Completed	Minor(s): Mechanical Engineering	Completed		
License	PL1	Pilots Licence			Completed on 24-Jul-2003	24-Jul-2003	
Membership	CSEG	Cdn Society Expl Geophysicists	Membership Id: 678444 Employer Paid: Yes	Dues: 500	N/A		
Skills	FRENCH	Speaks French	Level: 2		N/A		
Skills	PROJECT	Project Management Skills	Level: 10		Completed on 14-Sep-2007	14-Sep-2007	

Displaying 9 Qualifications

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Set the User Class Access to Qualifications
The following settings can be updated on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal.

- To prevent employees from being able to insert, edit, and delete qualifications, select True for QualificationSettings.EmployeeReadOnly.

- To prevent managers and regular users from being able to insert, edit, and delete qualifications for other employees, select True for QualificationSettings.ManagerReadOnly

- To prevent managers and regular users from being able to insert, edit, and delete qualifications for their employees, select True for QualificationSettings.ManagerReadOnlyForSelf.

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

CONSIGNED PROPERTY

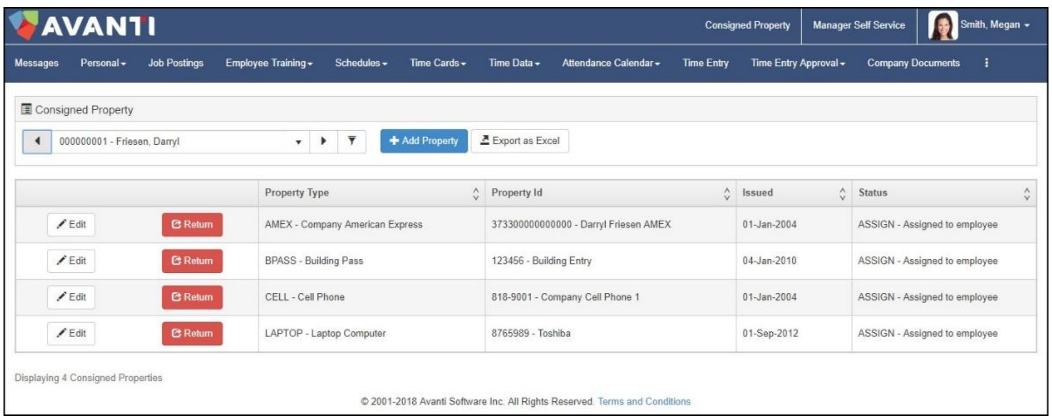
Only applicable to clients with Human Resources. Clients who do not have Human Resources can skip to Time Entry Approval – Right-Click Functionality.

Benefits: Users can now access consigned property from the Avanti Self-Service Portal.

Consigned Property provides the ability for managers and employees to view, add, edit, and return consigned property from the Avanti Self-Service Portal. This can be configured to only display the information relevant to your organization is required.

To use the new user interface, the menu item on the Web Menu will need to be added. For more information, please refer to the Add New Web Service Menu Items.

For more information on setting up Consigned Property, please refer to Web Services Reference Manual.



TIME ENTRY APPROVAL – RIGHT-CLICK FUNCTIONALITY

A right-click menu has been added to the following Time Entry Approval pages on the Avanti Self-Service Portal:

- Time Data Approval
- Attendance Calendar Approval

For clients with Time & Attendance, the following Time Entry Approval pages have also been updated:

- Availability Approval
- Schedule Approval
- Time Card Approval

If you are already using the Time Entry Approval, you can update to using the right-click approval pages by updating the menu. For more information on updating the menu, please refer to the Add And/Or Update Web Service Menu Items Section.

> Prior to updating Availability Approval, please confirm that the 'If entries exist' option is set correctly. For more information, please refer to Availability Approval - If Entries Exist.'

All these approval pages can have the following configured:

- Display one or multiple entries per day
- Add additional sort columns
- Use same date range and employee filters on all pages
- Retain selected employee and date after completing functions

For more information on setting up the Approval Pages, please refer to the Web Time Reference Manual.

USE SAME DATE RANGE AND EMPLOYEE FILTERS ON ALL APPROVAL PAGES

Time Entry Approval pages can be configured so that the last date range and employee filter that the user selected on any of the approval pages will be used the next time they access any approval page.

By default, the date range and employee filters that the user used last to access the specific Approval page will be used the next time that approval page is accessed.

To update to use the last date range and employee filter selected on any of the approval pages when the users access an approval page, select true for ApprovalSettings.CommonUserPreferences.

RETAIN SELECTED EMPLOYEE AND DATE ON ALL APPROVAL PAGES

Determine whether the employee and date selection will be retained after a function is completed or Refresh is selected on any of the approval pages with right-click menu functionality.

> Retaining these selections may impact performance.

By default, the first employee and date will be displayed after a function is completed or Refresh is selected.

To retain the employee and date selection after functions are completed, select true for setting ApprovalSettings.MaintainGridPosition on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal.

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

AVAILABILITY APPROVAL – 'IF ENTRIES EXIST'

Determines what will occur when approving an availability entry generates a schedule or time card entry and there are existing entries on the day.

By default, existing entries on the same day as the approved availability entry will be cancelled and the new entries will be added.

Setup

To change the behavior when availability entries approved:

> Enter Append, Skip, Replace, or CancelAppend for setting AvailabilityApprovalSettings.ScheduleEntriesFoundOption on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal.

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

Available options for the setting:

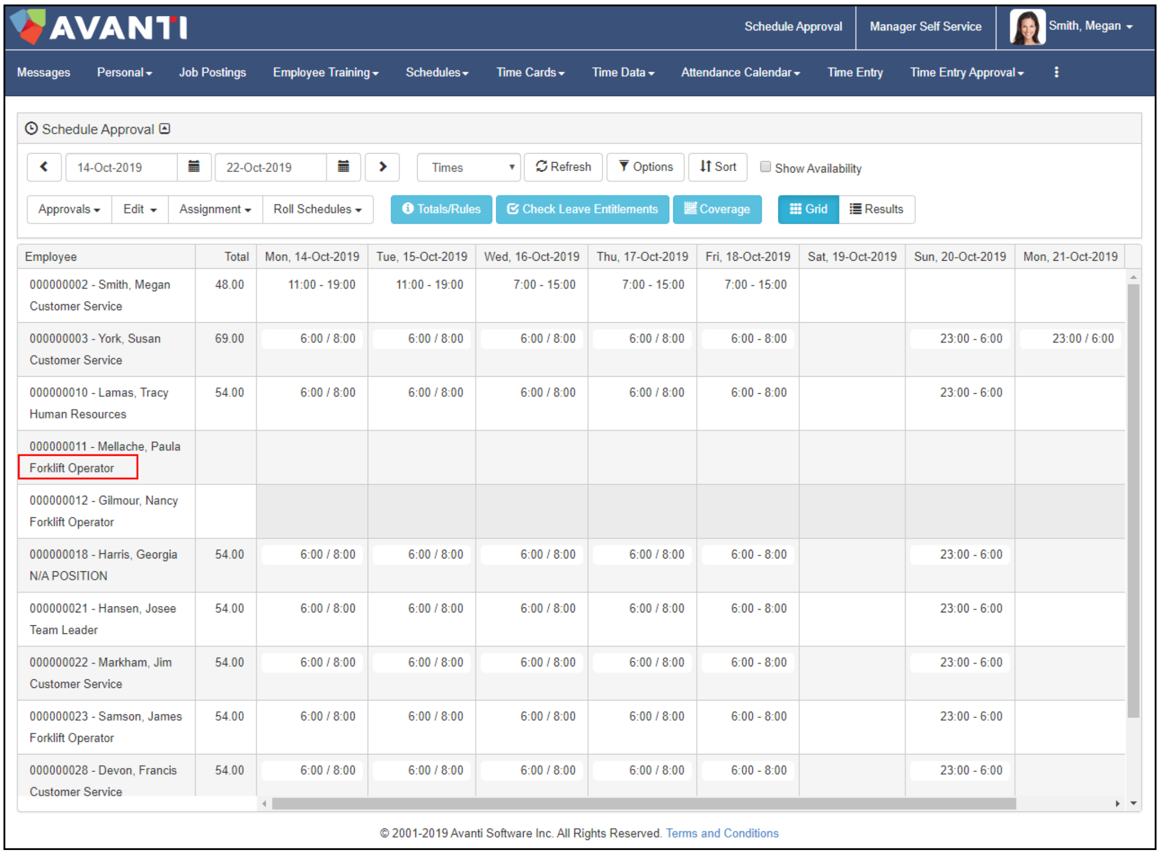
> Append: If selected, the new entries will be added to all selected days. This will not change the existing entries.
>
> Skip: If selected, the new entries will be added to days that do not have existing entries. If an entry exists for a day, no entries will be added to the day.
>
> Replace: If selected, existing entries will be removed, and the new entries will be added. Existing entries will only be removed on days that new entries are being created on.
>
> CancelAppend: If selected, all existing entries will be cancelled and the new entries will be added. Existing entries will only be cancelled on days that new entries are being created on.

SCHEDULE APPROVAL - EMPLOYEE PRIMARY POSITION

This provides the ability to display the primary position of the employees beneath the employee name on Schedule Approval.

By default, the primary position will not display on Schedule Approval.

To display the position, select true for ScheduleApprovalSettings.ShowPositionWithEmployeeName on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Once the setting is updated, select 'Reload Settings' in Administration >> Administration Settings on the Avanti Self-Service Portal.



PRINT REPORT FROM SCHEDULES AND TIME CARDS

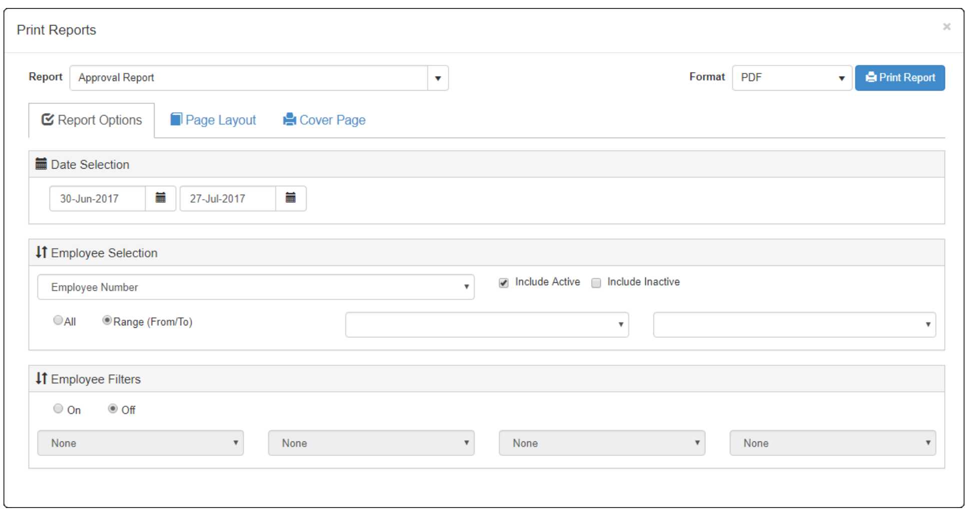
Benefits: Reports can now be viewed and saved without leaving the Approval Page.

Schedule and Time Card Approval now have the ability to print the following Time and Attendance Reports.

- Approval Report
- Daily Schedule Report
- Employee Schedule Calendar
- Employee Schedule Listing
- Exception Report
- Exception Summary
- On-Site Report
- Requirements Calendar (By Date)
- Requirements Calendar (By Position)
- Requirements Listing (By Date)
- Requirements Listing (By Position)
- Schedule Calendar
- Schedule Listing
- Schedule Variance
- Time Card Listing

By default, printing reports will not be enabled on the Schedule Approval or Time Card Approval.

When Print is selected, print options and selections can be specified prior to printing.



Enable reports

To enable reports, the following settings must be updated with the reports that can be printed:

- Specify the reports for Schedule Approval in setting ScheduleApprovalSettings.Reports.
- Specify the reports for Time Card Approval in setting TimeCardApprovalSettings.Reports.

These can be updated on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Once the settings are updated, select ‘Reload Settings.’

The reports must first be setup in Maintain Web Reports. For more information, please refer to [Time and Attendance Reports](). For more information on setting up Time & Attendance Reports, please refer to Web Services Reference Manual.

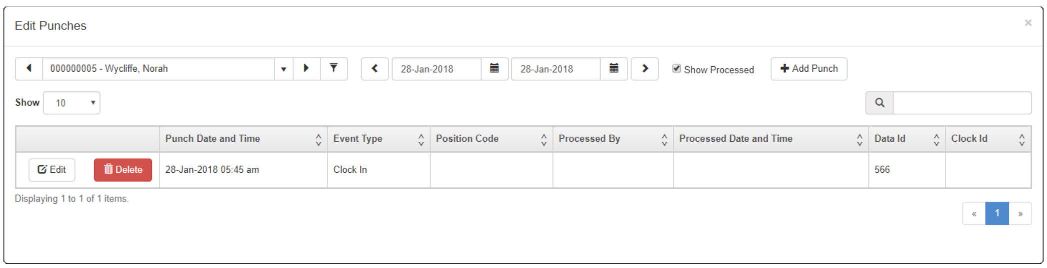
TIME CARDS - DISPLAY PUNCHES

Benefits: Punches can now be viewed and updated without leaving Time Card Approval.

Punches can be added on the right-click menu or the edit menu of Time Card Approval. By default, punches will not be available on Time Card Approval.

The menu permissions from the Maintain Punches web menu will be used to determine access to the page. If Maintain Punches has not been added to the web menu, the permission from Time Card Approval will be used to determine access.

To enable Punches select true for TimeCardApprovalSettings.AllowModifyPunches on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Once the setting is updated, select ‘Reload Settings’ in Administration >> Administration Settings on the Avanti Self-Service Portal.



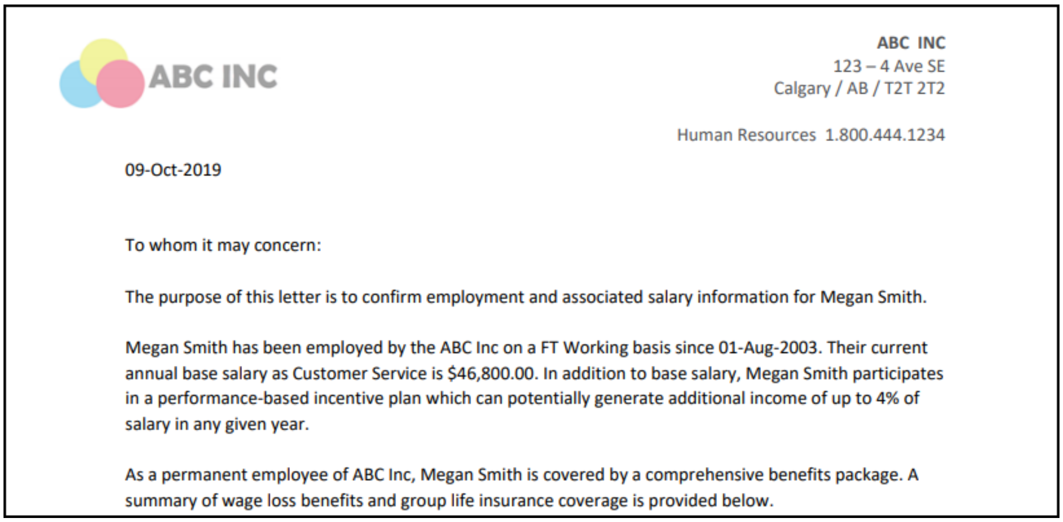
COMPANY DOCUMENTS – LETTER OF EMPLOYMENT

Benefits: Generate documents on request which contain current employee information.

Avanti now has the ability to generate letters of employment and other documents that use the employee's current data upon request.

These documents will use a template company document and populate it with employee information. Once the document is requested, it will be created and saved as an employee document.

A letter of employment can appear similar to the following:



ABC INC

ABC INC
123 – 4 Ave SE
Calgary / AB / T2T 2T2

Human Resources 1.800.444.1234

09-Oct-2019

To whom it may concern:

The purpose of this letter is to confirm employment and associated salary information for Megan Smith.

Megan Smith has been employed by the ABC Inc on a FT Working basis since 01-Aug-2003. Their current annual base salary as Customer Service is $46,800.00. In addition to base salary, Megan Smith participates in a performance-based incentive plan which can potentially generate additional income of up to 4% of salary in any given year.

As a permanent employee of ABC Inc, Megan Smith is covered by a comprehensive benefits package. A summary of wage loss benefits and group life insurance coverage is provided below.

Setup

Letter of employment uses a fillable PDF, report designer report, and the summary of company documents to create a document with employee information. Sample documents are available on the Form directory on the Avanti Share.

- Letter of Employment - Sample.pdf
- Letter of Employment - Report.ardx
- Letter of Employment - Doc Summary.txt

Step 1: Create the PDF

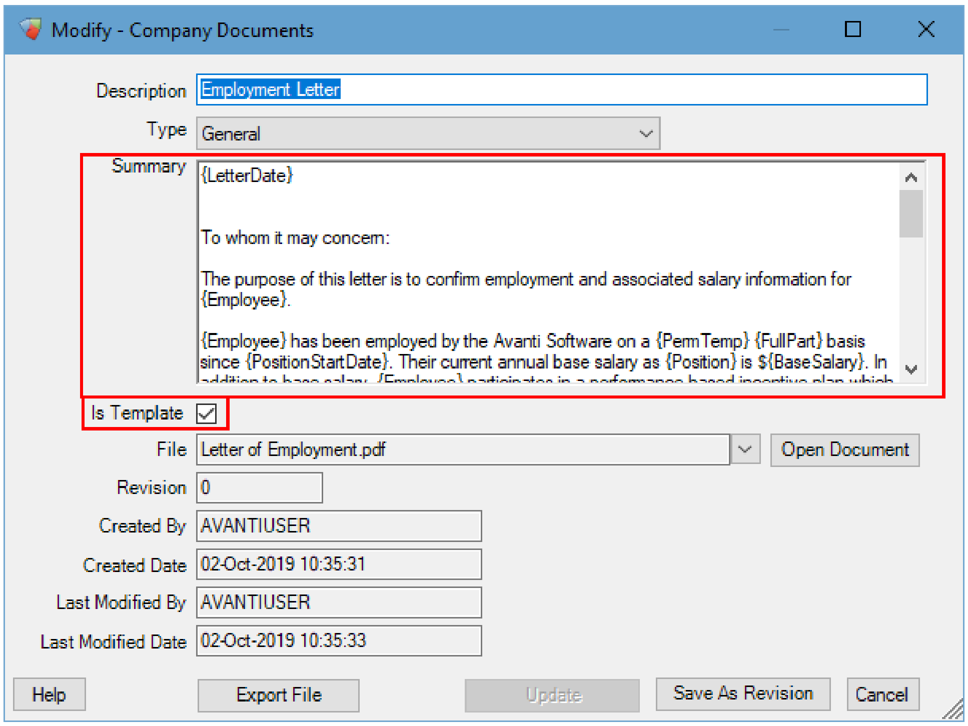
Create a PDF that the Letter of Employment will populate. This can be done by modifying the 'Letter of Employment - Sample.pdf' provided. The PDF must have a fillable text box for the contents of the report to be printed in.

Step 2: Add the Company Document

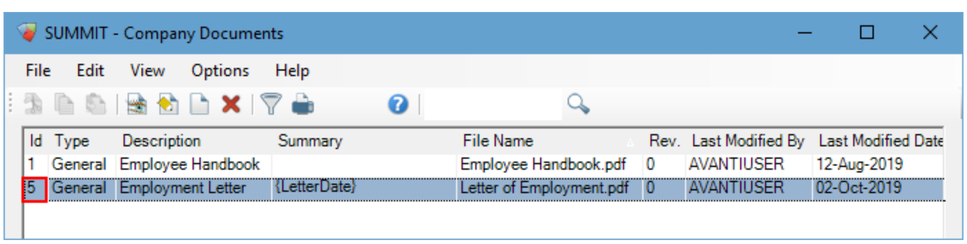
Prior to adding the company document, Company Documents will need to be updated to enable the creation of Template Documents. For more information, please refer to the Adding New Menu items into the Avanti Menu.

Once the Company Document menu item has been updated, insert the pdf created in Step 1.

The Summary of the Company Document is the text that will populate the document and can be copied from ‘EmploymentLetter.txt’ provided in the Form directory on the Avanti Share. Ensure ‘Is Template’ is selected.

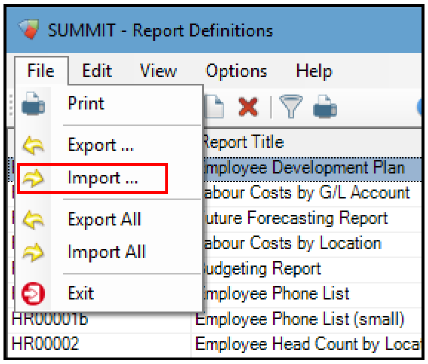


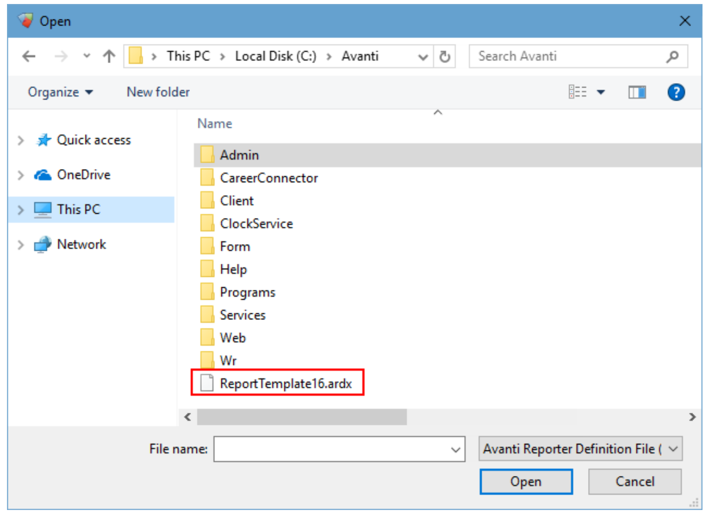
Please note the ID of the newly inserted document, as this will be required to complete ‘Import the Report.’



Step 3: Import and Update the Report

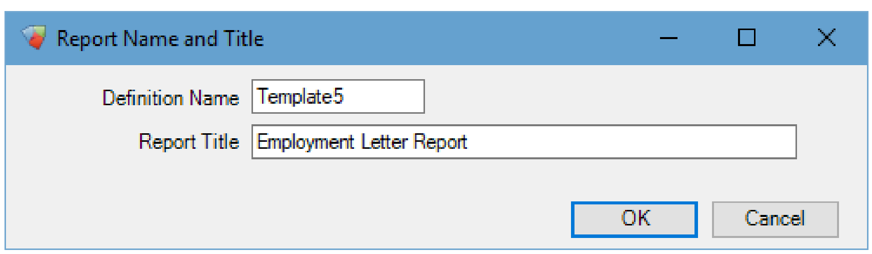
Report 'Letter of Employment - Report.ardx' must be imported. To import the report, please select File >> Import in Report Designer >> Report Definitions. Navigate to the Form directory on the Avanti Share and select 'Letter of Employment - Report.ardx', then select open then Open.





Once the report is imported, the report ID needs to be 'Template##' with the ID number of the Company Document identified in 'Attach the Company Document' replacing the ##. If the ID is one character, do not add leading zeros.

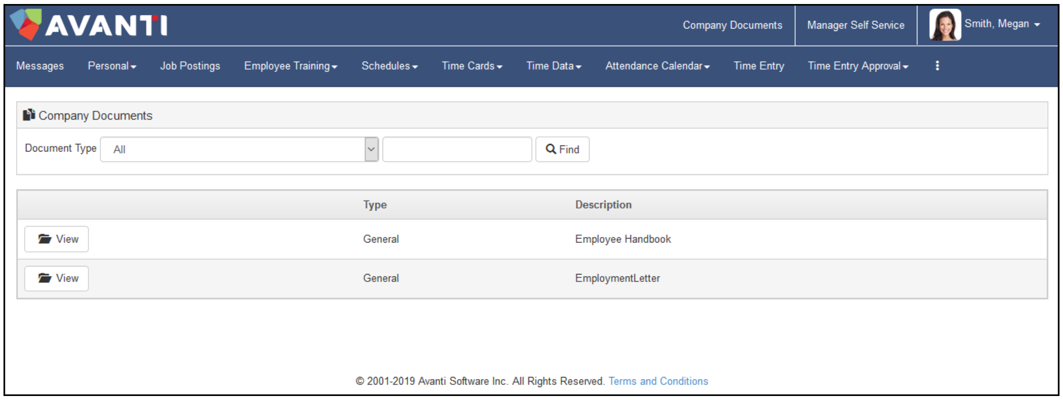
In the example above, the Company Document ID is 5; therefore, the ID of the report must be Template5.



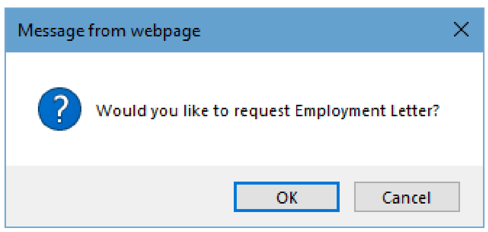
This report will be used with the summary of the company document with the report to create the contents of the Letter of Employment. The report can be updated to include any additional information that should be included in the letter. The summary of the company document will need to be updated to include any additional report sources.

Step 4: Access the letter of employment on the Avanti Self-Service Portal

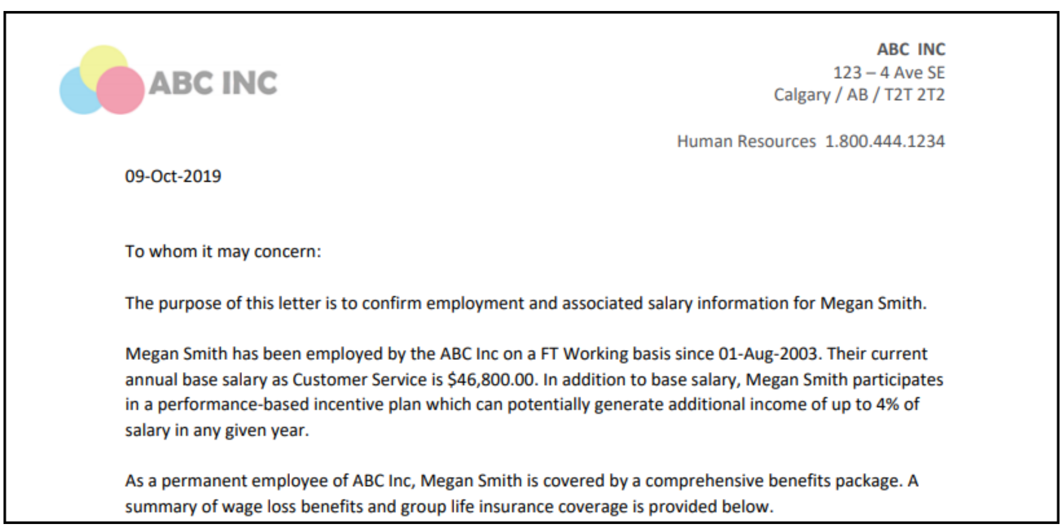
The document can be accessed from Company Documents on the Avanti Self-Service Portal. If the user does not have an employee attached, the View button will not be displayed.



When View is selected, a message similar to the following is displayed. The description of the company document will be used in this message.



If yes is selected, a letter of employment will generate and save as an employee document. The description and file name of the employee document will be the same as the company document template. The contents of the employee document will have the employee's information.



ABC INC

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123 – 4 Ave SE
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Human Resources 1.800.444.1234

09-Oct-2019

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As a permanent employee of ABC Inc, Megan Smith is covered by a comprehensive benefits package. A summary of wage loss benefits and group life insurance coverage is provided below.

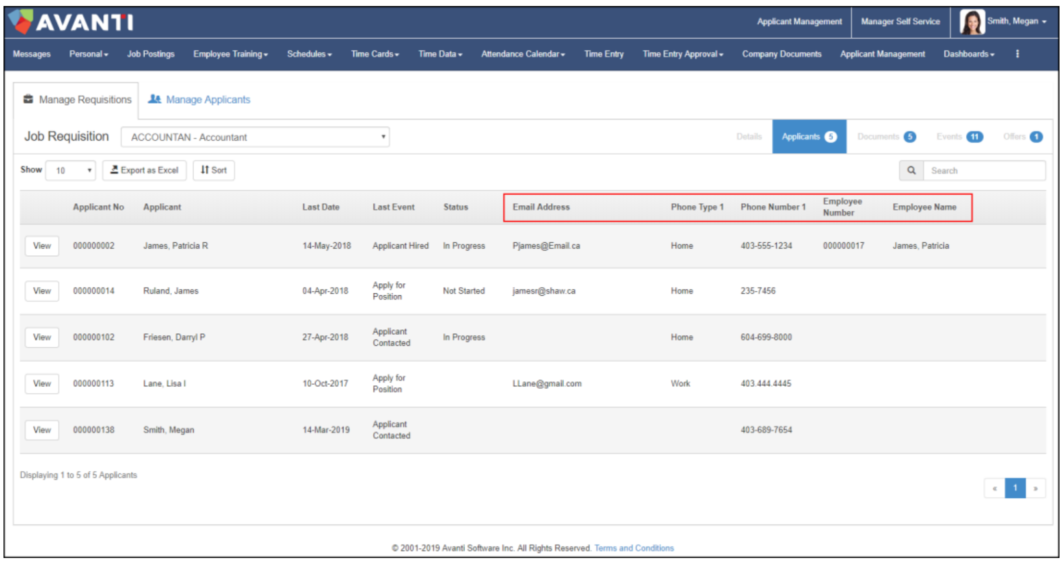
APPLICANT MANAGEMENT

Only applicable to clients with Applicant Management. Clients who do not have Applicant Management can skip to Payroll Reports.

APPLICANTS IN MANAGE REQUISITIONS - ADDITIONAL INFORMATION

The following applicant information is now available in the Applicants Section of Manage Requisitions:

- Email Address
- Phone Type 1 – 4
- Phone Number 1 – 4
- Employee Name
- Employee Number

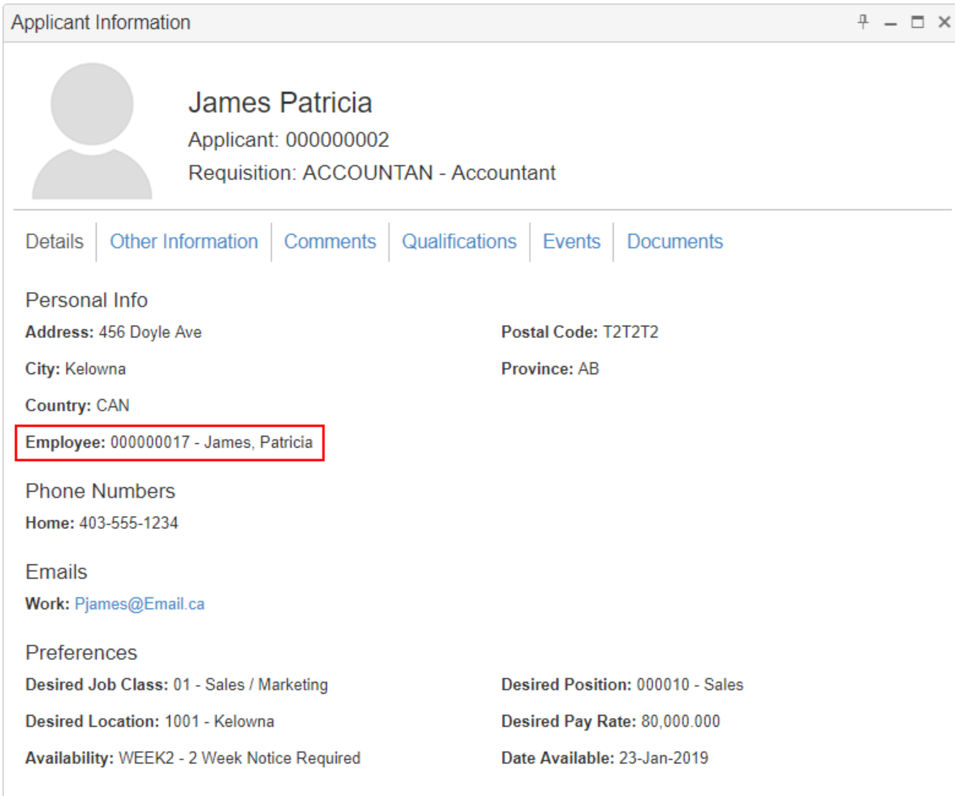


By default, these columns will not be available on Application Management. To add the additional columns, select Visible for the column on Sort. This can be added to the Applicants section of Manage Requisitions.

VIEW APPLICANT INFO – EMPLOYEE INFORMATION DISPLAYED

Employee Number and Name will now be displayed when View Application Info.

When View is selected on the Applicant Section of Manage Requisitions, an employee field will be displayed in the Details if there is an employee attached to the applicant.

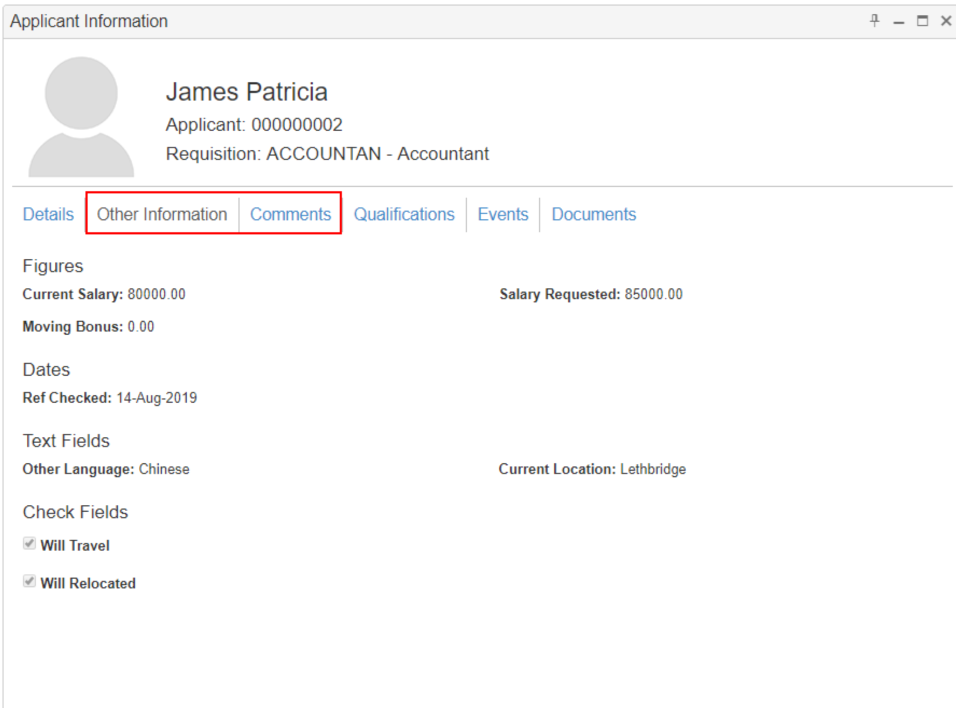


VIEW APPLICANT INFO – OTHER INFORMATION & COMMENTS

Additional sections, Other Information, and Comments have been added to the Applicant Information displayed when View is selected on the Applicants tab in Maintain Requisitions.

When Other Information is selected, the applicant information will display for the Figures, Dates, Text Fields, and Check Fields defined on the Misc. Fields tab in Applicant Management >> Installation & Maintenance >> Parameters. This information is entered on the Dates, Text Values, and Deduction Values tab of the Applicant Profile.

When Comments is selected, the comments entered on the Personal tab of the Applicant Profile will be displayed.



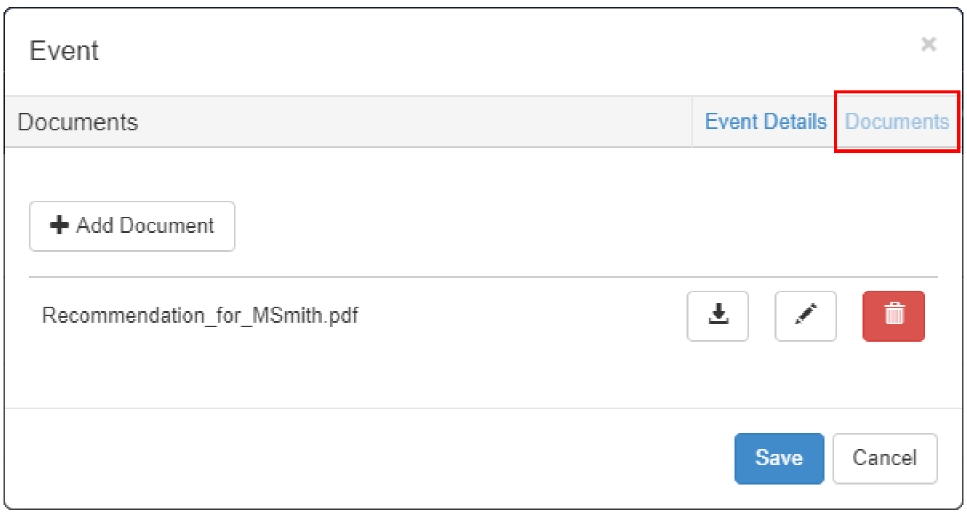
DOCUMENTS ON EVENTS

Benefits: Documents are now available from the Applicant Events.

Documents can now be accessed when adding or editing an event in Manage Requisitions and Manage Applicants. From Events, documents can be uploaded, edited, viewed, and deleted.

> A document can only be added to Events with an Event Type that has 'Use Documents selected on the Options tab in Applicant Management >> Installation and Maintenance >> Event Types.

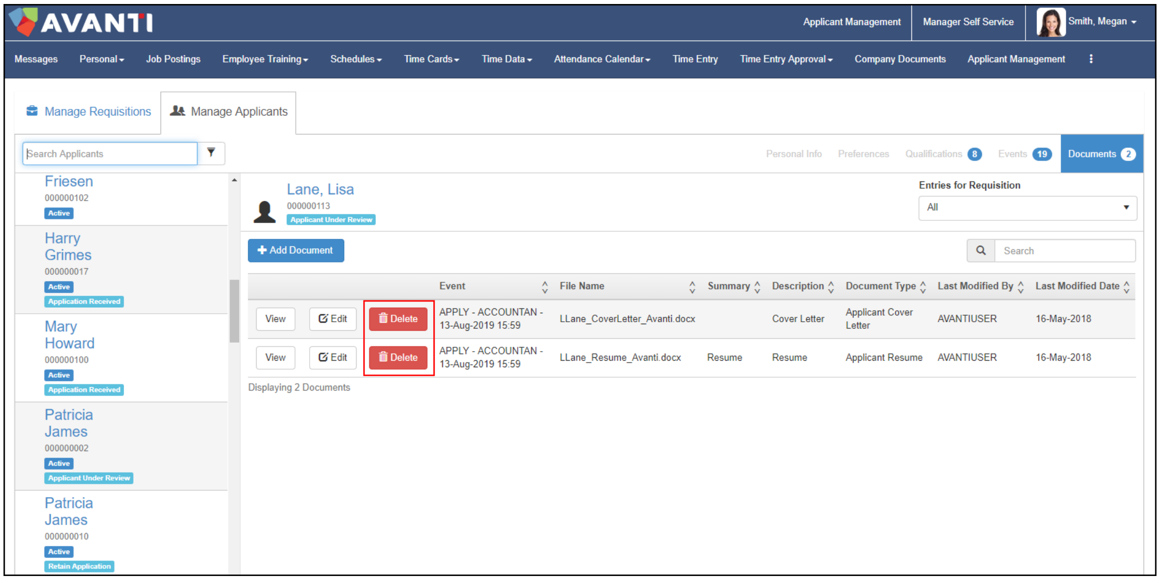
Previously, applicant documents could only be added on the Avanti Self-Service Portal by adding them to the Documents section on Manage Applicants.



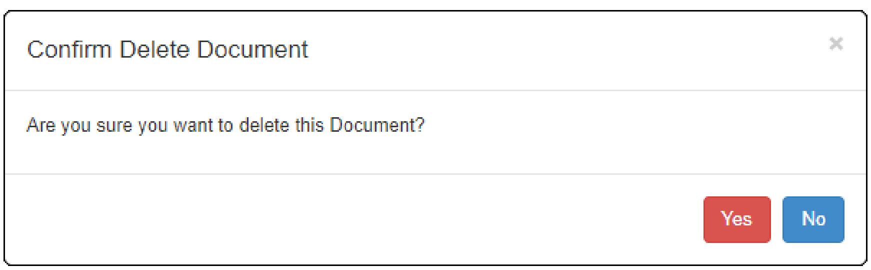
MANAGE APPLICANTS - DELETE DOCUMENTS

Applicant documents can now be deleted from the Documents section of Manage Applicants.

For an Avanti User to be able to delete an applicant document, the user must have delete permissions to the Applicant Management Web Menu and the Document Type.



Once Delete is selected, a confirmation message will display.



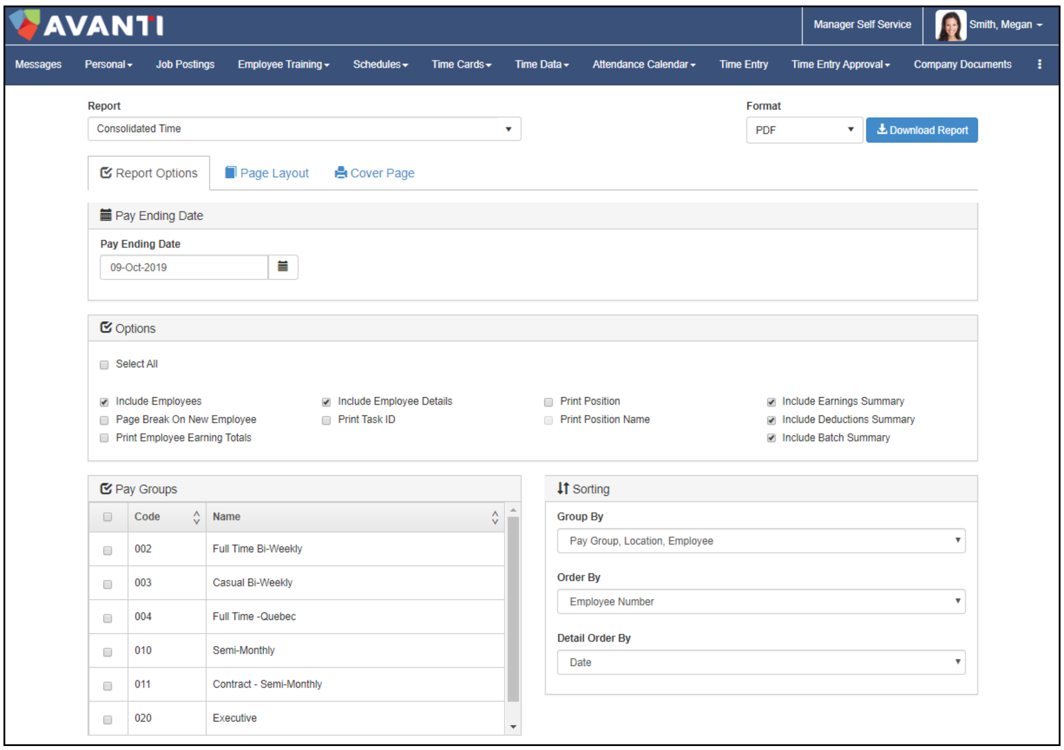
The document will be permanently deleted after Yes is selected.

PAYROLL REPORTS

Benefits: View, save, and print payroll reports from the Avanti Self-Service Portal.

The following Payroll Reports can be printed:

- Consolidated Time
- Payroll Register
- Processed Time Listing
- Processed Time From History



To access payroll reports on the web, the menu item on the Web Menu will need to be added. For more information, please refer to the Add New Web Service Menu Items.

Prior to printing a report, it must be added to Maintain Web Reports. Maintain Web Reports provides the ability to set the Role Type and access based on User Group for each Report.

For more information on setting up Payroll Reports, please refer to Web Services Reference Manual.

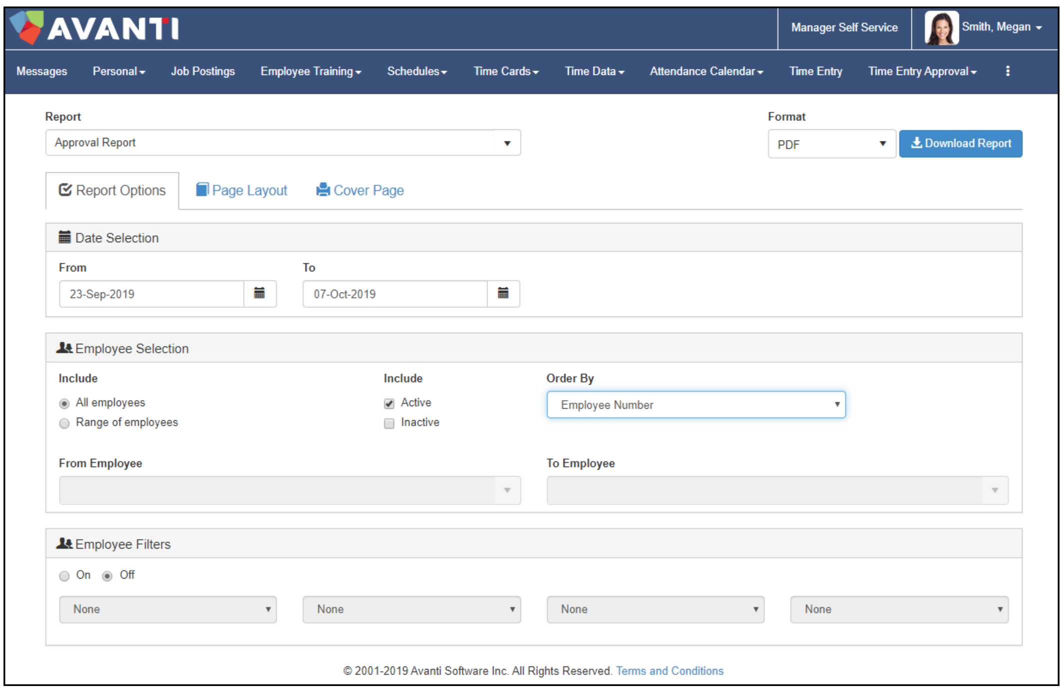
TIME AND ATTENDANCE REPORTS

Only applicable to clients with Time and Attendance. Clients who do not have Time & Attendance can skip to Personal Info Changes.

Benefits: View, save, and print Time & Attendance Reports from the Avanti Self-Service Portal.

The following Time and Attendance Reports can be printed:

- Approval Report
- Daily Schedule Report
- Employee Schedule Calendar
- Employee Schedule Listing
- Exception Report
- Exception Summary
- On-Site Report
- Requirements Calendar (By Date)
- Requirements Calendar (By Position)
- Requirements Listing (By Date)
- Requirements Listing (By Position)
- Schedule Calendar
- Schedule Listing
- Schedule Variance
- Time Card Listing



To access time and attendance reports on the web, the menu item on the Web Menu will need to be added. For more information, please refer to the Add New Web Service Menu Items.

Prior to printing a report, it must be added to Maintain Web Reports. Maintain Web Reports provides the ability to set the Role Type and access based on User Group for each Report.

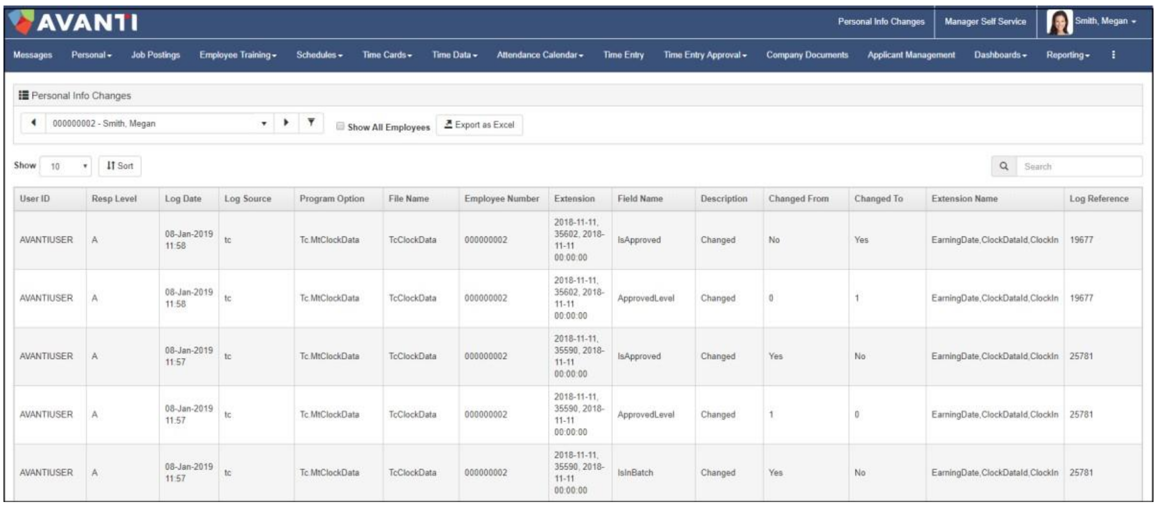
For more information on setting up Time & Attendance Reports, please refer to Web Services Reference Manual.

PERSONAL INFO CHANGES

Benefits: Personal Info Changes can now be updated to only display the information relevant to your organization.

Personal Info Changes now has a new interface on the Avanti Self-Service Portal. In addition to having a more modern appearance, the new interface provides the ability to select the columns displayed and rename the column headings.

For more information on setting up Personal Info Changes, please refer to the Web Services Reference Manual.



User ID	Resp Level	Log Date	Log Source	Program Option	File Name	Employee Number	Extension	Field Name	Description	Changed From	Changed To	Extension Name	Log Reference
AVANTIUSER	A	08-Jan-2019 11:58	tc	Tc.MtClockData	TcClockData	000000002	2018-11-11, 35602, 2018-11-11 00:00:00	IsApproved	Changed	No	Yes	EarningDate,ClockDataId,ClockIn	19677
AVANTIUSER	A	08-Jan-2019 11:58	tc	Tc.MtClockData	TcClockData	000000002	2018-11-11, 35602, 2018-11-11 00:00:00	ApprovedLevel	Changed	0	1	EarningDate,ClockDataId,ClockIn	19677
AVANTIUSER	A	08-Jan-2019 11:57	tc	Tc.MtClockData	TcClockData	000000002	2018-11-11, 35590, 2018-11-11 00:00:00	IsApproved	Changed	Yes	No	EarningDate,ClockDataId,ClockIn	25781
AVANTIUSER	A	08-Jan-2019 11:57	tc	Tc.MtClockData	TcClockData	000000002	2018-11-11, 35590, 2018-11-11 00:00:00	ApprovedLevel	Changed	1	0	EarningDate,ClockDataId,ClockIn	25781
AVANTIUSER	A	08-Jan-2019 11:57	tc	Tc.MtClockData	TcClockData	000000002	2018-11-11, 35590, 2018-11-11 00:00:00	IsInBatch	Changed	Yes	No	EarningDate,ClockDataId,ClockIn	25781

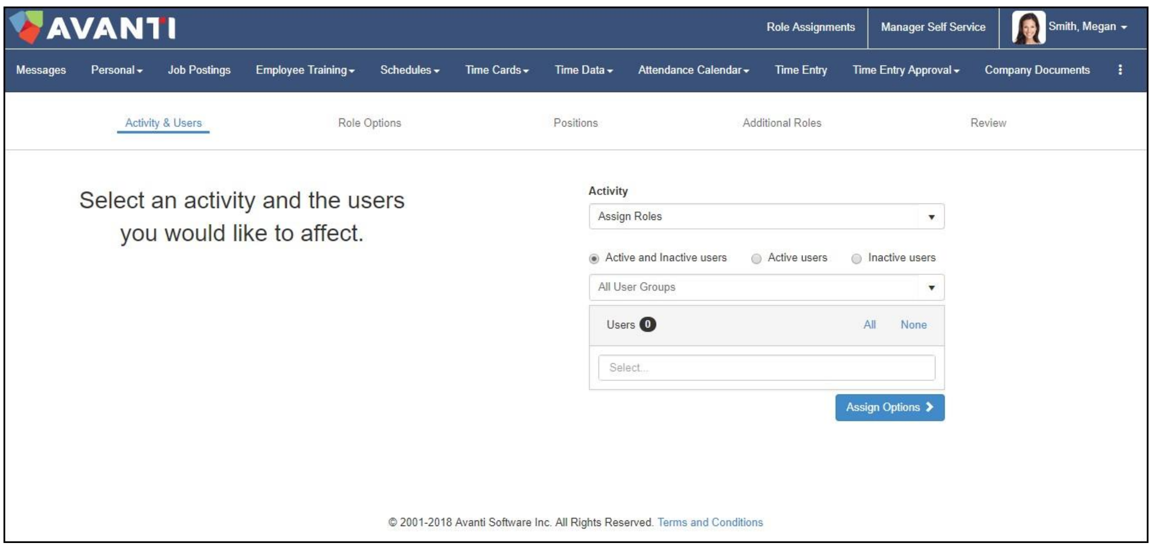
ROLE ASSIGNMENTS

Role Administration provides the ability to view, assign, delegate, modify, or delete roles.

Regular Users will have access to every user they have user group access to in the current company. Manager Users can view, delegate, and delete the delegation of their own roles. Manager Users cannot view or modify roles assigned to others.

Roles determine which employees the user has access to in Time and Attendance and on the Avanti Self-Service Portal. Employee access is determined based on the positions assigned to an employee. Role Assignments only affect Manager Self-Service and Regular Users, as only these users can view other employees.

For more information on setting up Role Assignments, please refer to Web Services Reference Manual.



ONBOARDING

Only applicable to clients with Workflows. Clients who do not have Workflows can skip to Employee Information.

ONBOARDING LOGIN MESSAGES

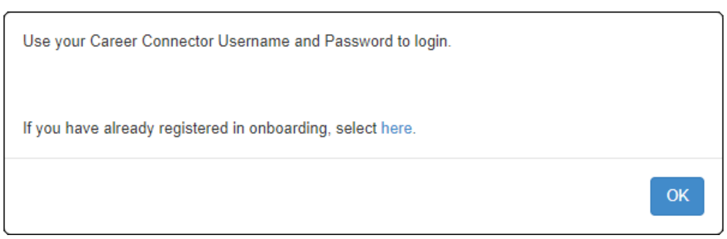
Benefits: Display additional information on the Onboarding login.

Additional messages can be added to the Onboarding Login. A message can be displayed beneath the Login button. An additional message can be added in a popup which can contain external links.

By default, messages will not be displayed on the Onboarding Login.

For example, the OptionalOnboardingLoginMessage1 can appear similar to the following on the Onboarding Login once setup.

If there is text entered for OptionalOnboardingLoginMessage2, OptionalOnboardingLoginMessage1 will become a hyperlink. When the hyperlink is selected, the popup will appear similar to the following.



Add a message to the Onboarding Login

To add a message that will be displayed on Onboarding Login beneath the login credentials, enter the message to the value section of the following settings:

- To add a message to the English Onboarding Login, update OptionalOnboardingLoginMessage1.
- To add a message to the French Onboarding Login, update OptionalOnboardingLoginMessage1Fr.

This message can be formatted using HTML and can be updated on the System Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Once the settings are updated, select 'Reload Settings.'

Add a message displayed in a popup

To add a message that will be displayed as a popup when the Onboarding message is selected, enter the message to the value section of the following settings:

- To add a message to the English Onboarding popup, update OptionalOnboardingLoginMessage2.
- To add a message to the French Onboarding popup, update OptionalOnboardingLoginMessage2Fr.

This message can be formatted using HTML and can contain external links. These settings can be updated on the System Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Once the settings are updated, select 'Reload Settings.'

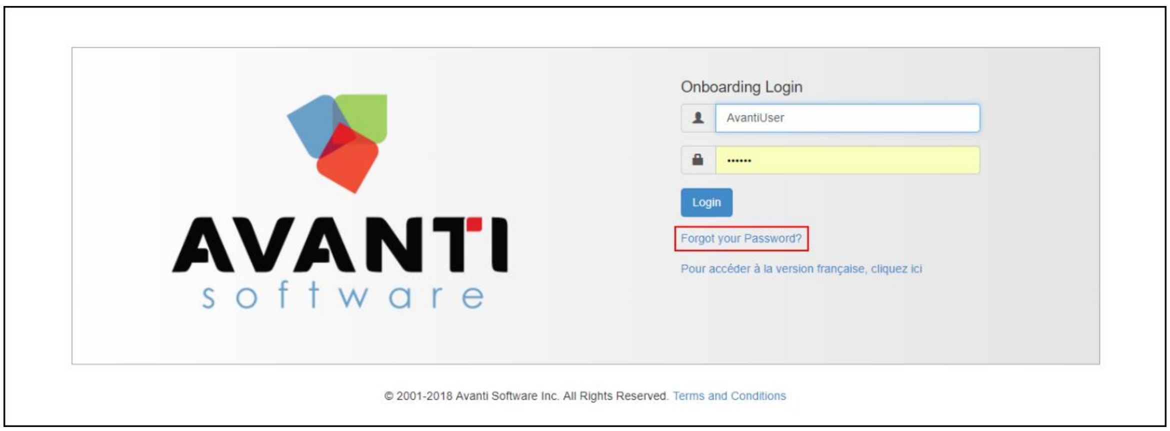
ONBOARDING PASSWORD RESET

Benefits: New employees completing Onboarding can now reset their password from Onboarding Login.

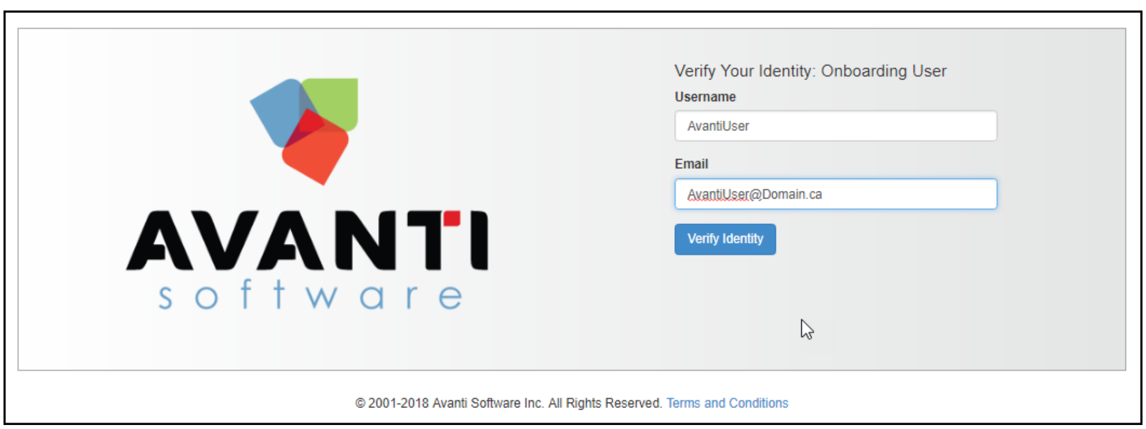
Employees completing Onboarding can now reset their passwords. To reset their password, users will enter their username and email to verify their identity. Once the user's identity is verified, an email will be sent with a verification code that can be used to reset the password.

> A password can only be reset from Onboarding Login before the registration step is completed. Once the registration step is completed, users can log in and reset passwords from the Avanti Self-Service Portal, if enabled.

Password Reset on Onboarding will appear similar to the following:



When 'Forgot your Password' is selected, employees will be prompted to enter their Username and Email.



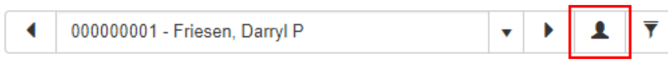
By default, Onboarding Password Reset will not be enabled. To enable this feature, select True for AllowOnboardingUserPasswordReset on the System Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Reload Web Setting must be selected once the setting is updated.

EMPLOYEE INFORMATION

Benefits: Employee Info provides the ability to view specific information about the employees without having to navigate to another page.

Employee Info provides the ability for users to view personal information, employment data, schedule information, and qualifications.

When true is selected for EmployeeInfoSettings.ButtonVisible, a button similar to the following will be displayed on selected pages throughout the Avanti Self-Service Portal.



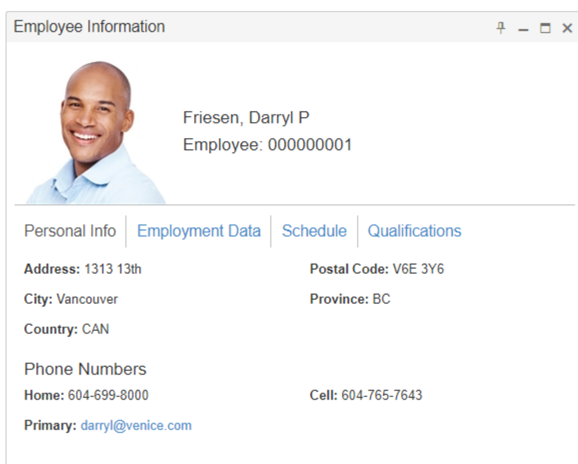
Additionally, Employee Info can be accessed by right-clicking on an employees' name on the Approval Pages and by selecting 

, where available.

When Employee Info is selected, a screen similar to the following will be displayed. Up to 4 tabs can be displayed:

- Personal Info
- Employment Data
- Schedule
- Qualifications

For more information on setting up Employee Info, please refer to Web Services Reference Manual.



DROPDOWN FORMATTING

Benefits: Display only the information relevant to your organization in select dropdowns.

The following dropdowns can now be formatted to display the Code ID, the Code Description, or both on certain pages on the Avanti Self-Service Portal.

- Availability
- Earning Codes
- Job Classification
- Location Codes
- Other Code
- Pay Code
- Position Codes
- Property ID
- Property Status
- Property Type
- Shift Id
- Union

Additionally, the order the options in the dropdown will be displayed in can be updated. By default, these dropdowns will continue to display the 'Code Id – Description' in alphabetical/ascending order based on the Code ID.

Setup

To change the dropdown, update the setting value on the Company Settings tab in Administration >> Administration Settings on the Avanti Self-Service Portal. Once the settings are updated, select 'Reload Settings.'

Code	Company Setting
Availability	Lookup.Availability
Earning Codes	Lookup.EarnDeductCode
Job Classification	Lookup.JobClass
Location Codes	Lookup.Location
Other Code	Lookup.OtherCode
Pay Code	Lookup.PayCode
Position Codes	Lookup.Position
Property ID	Lookup.PropertyID
Property Status	Lookup.PropertyStatus
Property Type	Lookup.PropertyType
Shift Id	Lookup.ShiftId
Union	Lookup.Union

To display just the Code ID alphabetical order, enter the following for the value of the setting:

Code, Code, False

To display just the Description in alphabetical order, enter the following for the value of the setting:

Name, Name, False

To display just the 'Code ID – Description' in alphabetical order based on the Code Id, enter the following for the value of the setting:

Desc, Code, False