

November 28, 2016

**Re: HRsoft Software Release Note | Software Version 9.4 | Nov 2016**

Dear Colleague,

We are pleased to inform you that the latest version – v9.4 - of the HRsoft Talent Center Software is now available. The new release has been published, and is ready to be reviewed in your User Acceptance Testing (UAT) site. Once reviewed, the new release will be promoted to your Production sites.

The following pages are Release Notes containing a description of the enhancements contained in v9.4 and organized by specific product.

At HRsoft it is our goal to constantly improve the software you use based on client feedback and suggestions. With routine releases we continue to bring valuable enhancements to clients.

Kindly share this information with others in your organization. And please do not hesitate to call us with your questions or suggestions.

As always, we deeply value the relationship with you and appreciate your loyalty and support.

Sincerely,

HRsoft



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# 1 COMPview Compensation Planning and Management



## Enhancements

### 1 Planning spreadsheet enhancements:

- ✓ Allow display of selected components and enter awards in the Planning Summary screen. The components of selected Compensation programs can now be displayed in the Summary tab of the planning spreadsheet. This includes the actual award amount and % columns, where a planner can directly enter their awards, without having to go to the Program tab.

PCA 2013 Merit Plan Dont Change it > Planning > Pierre Taylor Grp Count: 12 Status: Unopened Filter: none Scope: Direct Reports Advanced Alert Print Refresh Submit

Summary											
Alerts	Options Calculated Amount	Options Calculated Number	Options Salary %	Stock Total %	Lumsum Actual Amount	Merit Actual Amount	Lumsum Actual %	Merit Actual %	Lumsum Calculated Amount	Merit Calculated Amount	Lumsum Salary %
	\$ 60,564.00 USD	20,188 Units				235,200 CAD	100.00 %			235,200 CAD	
⚠	\$ 96,999.00 USD	32,333 Units			<input type="text"/> USD	388,000 USD	100.00 %		97,000.00 USD	388,000 USD	
	\$ 60,564.00 USD	20,188 Units				235,200 CAD	100.00 %			235,200 CAD	
⚠	\$ 96,000.00 USD	32,000 Units			<input type="text"/> USD	384,000 USD	100.00 %		96,000.00 USD	384,000 USD	
	\$ 66,240.00 USD	22,080 Units				220,800 EUR	100.00 %			220,800 EUR	
	\$ 72,801.00 USD	24,267 Units				291,200 USD	100.00 %			291,200 USD	
	\$ 62,400.00 USD	20,800 Units			<input type="text"/> USD	249,600 USD	100.00 %		62,400.00 USD	249,600 USD	

- ✓ Add columns to Planning spreadsheet to show budget contribution by employee. For every calculated budget in a Compensation plan, two additional columns can be listed in the planning spreadsheet: the contribution of each employee to the available budget and – if available – the discretionary budget amount entered for the employee.

PCA 2013 Merit Plan Dont Change it > Planning > Pierre Taylor Grp Count: 12 Status: Unopened Filter: none Scope: Direct Reports Advanced Alert Print Refresh Submit

Summary												
Alerts	Job Title	Stock Total Amount	Stock Total Number	Emp Effective Date	Compensation History	Salary Program	Stock	Merit Budget Calculated Emp Amount	Merit Budget Discretionary Emp Amount	Options Actual Amount	Options Actual %	Options Actual Number
	Financial Analyst			6/30/08				7,267.68 USD		<input type="text"/> USD		<input type="text"/> Units
⚠	Market Technology			6/30/08				11,640.00 USD		<input type="text"/> USD		<input type="text"/> Units
	Financial Analyst			6/30/08				7,267.68 USD		<input type="text"/> USD		<input type="text"/> Units
⚠	Financial Analyst			6/30/08				11,520.00 USD		<input type="text"/> USD		<input type="text"/> Units

- ✓ Allow spaces in program names. Program names (e.g. display as tab titles in the Planning spreadsheet) can now contain spaces.

## 2 Employee spare fields enhancements:

- ✓ Add Employee Spare field of type "List". It is now possible to configure a predefined set of values for text-based employee spare fields. These values will be displayed in form of a dropdown list in the Planning spreadsheet and can be used for purposes such as "reason code", etc.

Summary		EdSalary	Ed Variable Pay	EdStock				
Alerts	Old Edward PR Set	EdMerit Actual Amount	LIST_TEST	TOATL_TESTa	Ed Lumsum Actual Amount	EdMerit Actual %	New Edward PR Set	Ed Lumsum Actual %
	4	0.00 CAD/YR	Select	1,000.00		%	5	
	4	0.00 USD/YR	Promotion Adjustment On Leave	20.00		%	Unassigned	
	4	0.00 USD/YR	Select			%	5	
		0.00 USD/YR		1,020.00				

- ✓ Numerical and Currency-type employee spare fields can now show group totals in Planning. Selected number-type and currency-type employee spare fields can now be configured to show a group total in the Planning spreadsheet.

Summary		Salary Program	Stock									
Alerts	Name	Compa Ratio Starting Salary	Compa Ratio Salary	Merit Actual Amount	TOATL_TESTa	Merit Actual %	Merit Calculated Amount	Merit Salary %	Current Salary	Employee #ID2	Last Name	First Name
	Amato, Lucie	1.75	1.75	251,800 USD	6,295.20	100.00 %	251,800 USD	399.99 %	5,246.00 USD/MN	abcde12506	Amato5	Lucie5
	Andrews, Charlotte	1.30	1.30	564,000 EUR	14,100.00	100.00 %	564,000 EUR	400.00 %	141,000.00 EUR/YR	abcde30005	Andrews	Charlotte
	Employee1, New	5.71	5.71	320,000 USD	8,000.00	100.00 %	320,000 USD	400.00 %	80,000.00 USD/YR	abcdef052187	Employee1	New
	Evans, Jean	1.61	1.61	720,000 USD	18,000.00	100.00 %	720,000 USD	400.00 %	180,000.00 USD/YR	abcde30009	Evans	Jean
				5,454,400.00 USD	130,640.50	5,454,400.00 USD		1,363,605.00 USD/YR				

- ✓ Added new employee attributes for usage in formulas and employee-spare fields (e.g. for display in Planning). Added employee attributes to return the currency code, the current and the new salary hourly rate of an employee.

## 3 Formula-based employee spare fields are now calculated for history intervals. In the past, only the current data was calculated for formula-based employee spare fields. Now, even history intervals will be updated with the results for formula-based employee spare fields.

- 4 **Extended filters to reference employee spares history data.** Filters can now filter not only on current but also historical employee spare data, whether imported or formula-based.

5 **Improved plan configuration usability.**

- ✓ When configuring component guidelines, the guideline rules can be cloned to avoid manual configuration.

**Guideline Rules**  
Please Use Following Section To Configure Guideline Rules For The Selected Component. You May Change These Details Later As Well.

**Add New** **Add Clone** **Delete Selected**

**Attach Filter to Guideline Rules.**

Default Guideline: [EdMerit](#) [\[Remove\]](#)

Guideline Name	Filter Name	Order	<input type="checkbox"/>
<a href="#">EdMerit*</a>	<a href="#">[ Attach Filter ]</a>		<input type="checkbox"/>

- ✓ Logic and lookup tables can now be cloned to easily create a number of tables with similar structure.

**Formulas** **Lookup & Logic Tables**

**Add New** **Delete Selected**

Search:

Name	Description	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a> DataFeedTest		<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a> ed_logic_1_salary_and_maker	test	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a> ed_lookup1_emp_job_grade	test	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a> Executive_Job_Grade_CG		<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a> HAS_STOCK_OPTION_ELIG_LTI_LEVEL	Lookup table by an emp_spares field (LTI_LEVEL) that will contain ONLY LTI Plans that are eligible for a stock component	<input type="checkbox"/>
<a href="#">Edit</a> <a href="#">Clone</a> ineligible_jobgrade		<input type="checkbox"/>

- 6 **Data feed enhancements.** Data feed files referencing compensation plans, marker types, performance rating sets or a currency base can now use the name of the referenced entity rather than its internal id. Old files referencing the id will continue to work.

**7 Delete plan specific audit data when plan is still being configured.** When a Compensation plan is moved back into the Configuration stage, the plan specific audit data (e.g. Transaction audit data, group status audit data, performance rating audit data) is being removed to allow for a clean start.

## 8 Compensation plan configuration wizard validation

Introduced UI side validation to give visual clues for missing parts in the configuration.

Click 'Manage Plans' button to select a different Compensation plan...

**Plan**

- Performance Ratings
  - Edward PR Set
- Markers
- Programs and Components
  - Salary
    - EdSalary
  - Components
    - EdMerit
    - Ed Lumsum
  - Stock

**Component saved successfully.**

Name: Merit  
Alias: Merit

\* Component Start Date: 01-Aug-2016  
\* Component End Date: 31-Dec-2016  
\* Award Date for Calculated Transactions: 30-Dec-2016

Calculate only with current data (ignore employee history data):  Ignore

Component Award adds to new Salary:  (Uncheck this Box for Lump Sum Components)

Take Salary in excess of Max. Marker:  (Requires previous Checkbox to be unchecked)

## 9 Ability to Filter Employee Spares and Global Formula and Lookup/Logic Tables:

This is a new feature for these screens where user can type and filter a particular spare field or formula by typing in the search field.

Search:

	<b>ID</b>	<b>Display Name</b>	<b>Description</b>	<b>Data Type Code</b>	<b>Da</b>
<a href="#">Edit</a>	EMP_ID	EMP_ID	Employee ID numberqq	S	0
<a href="#">Edit</a>	DEPT_NAME	Department Name	Employee department name	S	50
<a href="#">Edit</a>	DEPT_CODE	Department Code	Employee department code	S	15
<a href="#">Edit</a>	LOCATION	Location	Employee location	S	40
<a href="#">Edit</a>	GENDER	Gender11	gender11	S	1
<a href="#">Edit</a>	LTI_LEVEL	LTI_Level	LTI level	S	15

# 2 STAYview Stay Interviews



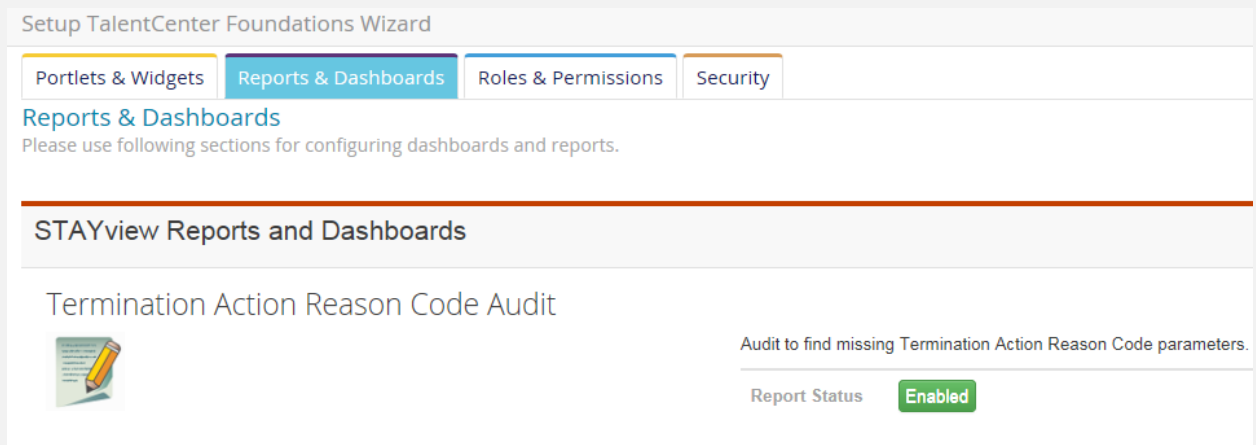
## Enhancements

- 1 **STAYview Software Implementations - Single CDF file can be used for clients.** HRsoft has developed a single Common Demographic File (CDF) that can be used to populate the Stay Interview software solution.
  - ✓ New fields have been added in custom field placeholders that were already available in our CDF format as spare fields.
  - ✓ The following optional fields have been added to the CDF.
    - a. DEPT\_CODE
    - b. LOCATION
    - c. GENDER
    - d. IS\_STAYVIEW\_ELIGIBLE
    - e. TERMINATION\_CODE
    - f. TERMINATION\_DATE
  - ✓ The following Management Reports will be supported in STAYview using this new consolidate Common Demographic File (CDF) file. The reports below have dependent fields in the file format, if some data is not available then corresponding reports can be turned off for that client.
    - a. Activity Status
    - b. Potential Leave Reasons Summary
    - c. Stay Reasons Summary
    - d. Stay Forecast: Red/Yellow/Green
    - e. Salary vs Retention Matrix
    - f. Retention Forecast
    - g. STAYview Open ended questions
    - h. STAYview Questions
    - i. STAYview Summary
    - j. Termination Reason
    - k. Yearly Turnover Count
    - l. Turnover by Length of Service (All Time)
    - m. Turnover by Year / Length of Service
    - n. Yearly Turnover % (YEAR TO DATE)
    - o. Yearly Turnover % (ANNUALIZED)



**2 Enhanced STAYview interview wizard** to allow managers to move back without entering answers to all the questions.

**3 Added audit reports** for administrator to see the list of job codes with missing turnover cost and action reason codes missing in the system. This will help HRsoft to share these details with the client to help prepare the data feed files to import in STAYview system.



**4 Enhanced STAYview to add auditing capability** for the stay plans created using the Stay interview. The interviewer name and change date are now recorded for every objective and stay plan created or modified during a Stay Interview.

# 3 PERFORMview Performance Management System



## Enhancements

- 1 Support for Employee information on Performance Recommendation Tab.** It now supports all the employee demographic information on Recommendations page.
- 2 Added additional reporting fields in Performance Compliance reports.**
- 3 Better and faster rich textbox implemented** to facilitate rich HTML comments in various comment sections.

### Add Comments

Privacy Level  Public <sup>?</sup>  Private <sup>?</sup>

Email Comments?  Yes  No

Rich text editor toolbar with icons for undo, redo, bold, italic, bulleted list, numbered list, decrease indent, increase indent, link, and unlink.

Rich text editor content area with a vertical cursor at the start.

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## Other Improvement

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- 1 Better Printing in Chrome:** Fixed Chrome related print issues in Performance Documents and 360 Reports.
- 2 Improved Translations:** Now more user friendly translations are displayed on various screens.

# 4 Contentview HR Content Management System



## Enhancements

- 1 Added Google Analytics to HRsoft Products.**
  - ✓ Help analyze user traffic and see most visited pages.
  - ✓ Analyze site traffic based on geographical area.
  - ✓ Traffic analysis based on particular browser, device or OS.
  - ✓ Analysis based on new vs returning users.

# 5 PLATFORM

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## Enhancements

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### 1 Existing Project Document Improvements.

- ✓ General look and feel improvements in all project documents
- ✓ Improved responsible time of SOW(Statement of Work) on the timeline tab
- ✓ Improvements in Compensation Requirement document by including following items:
  - a. Screen Preferences
  - b. Home Page Contents
  - c. Showing only plan based formulas
  - d. Introduce virtual group sections
  - e. Employee spares section improvement
  - f. Guideline Grid Improvement

### 2 New Report Requirement Document.

This is a new auto generated document which will capture the details regarding all the reports configured for a client.

### 3 UI Preferences Improvements.

Preferences can now be changed using drag/drop rather than manually typing on the column order on the screen.

**UI Preferences: Planning**

My Preferences  User Defaults

Order	Header	ReadOnly	Visible
1	New Performance Rating	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Old Performance Rating	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Perf Doc	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	New Secondary	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Old Secondary	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	Perf Doc	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Apply Reset my preferences Re-arrange Close

### 4 New Print Center screen.

This is a new screen which facilitates the printing of all important project documents from one screen. We no longer have to open multiple wizards to print a document

**Document Print Center**

What would you like to print?  
Compensation Requirement document

Select a Plan  
PCA 2013 Merit Plan Dont Change it

PRINT

Close