

## Our NEW isolved release goes live:

#### November 3rd, 2023

Release v9.21 has some exciting new additions! We are working hard to provide the best tools for you and your team.

#### In this release:

- Remove Inactive Timeout
- 12 Hour Authentication Change
- Hide Inactive Clocks
- Organizational Chart Updates
- Assignments by Hire Date
- Screen Updates

#### Architecture Remove Inactive Timeout

The Inactive Timeout option has been removed from the Adaptive Setup screen. The timeout option is now set system wide at 15 minutes for AEE. The Multifactor Authentication period remains at 12 hours.

This means that users who are inactive while using AEE for more than 15 minutes will be signed off automatically.

#### Adaptive Setup

Other Options				Custom Tile		
ESS Activation Emai	I Template:		~	Copy logo from Legal Company		
	Hide Checks Unti	il Pay Date				
	Force Logout On	Close 3		Upload Logo Image: Upload		
Electronic Conser	nt					
	Activate Electron	ic Signature Consent				
Override Paper (	Comm Fee:					
	Def	ault communications fee is "no ch	arge"			
Override Paper De	livery Addr:		~	Remove		
		Default is Company Legal Ad	dress	Link URL		
Year End Tax Forr	ns Electronic Consent			www.isolvedhcm.com		
	Activate Year End	d Tax Form Electronic Consent				
YE Tax Form Emai	I Template:		~ <b>(</b>			
Restricted Fields						
Field Name	Manager Access	Supervisor Access				
Salary:	Not Restricted 🗸 🗸	Not Restricted	~			





## Mobile App 12 Hour Authentication Change

When using Multifactor Authentication to log in, the user will have the option to keep the authentication good for 12 hours. Users will still have to sign in as they normally would, but can skip the Multifactor Authentication if it has been within 12 hours of their last log in. Note: Users do not want to use this feature on a shared device where someone else can access the device while the authentication is still valid.

Note: This is only for the mobile app at this time.

		emailed	
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	*****	Security Verification Code	0
		Remember me on this device Valid for 12 hours	
		Submit	
			0000

#### Time Hide Inactive Clocks

Users now have the option to Hide Inactive Clocks when on the Manage Clocks screen. By default, only active clocks are shown on the list. In the upper left corner of the page, users now have an option to sort clocks by all, active and inactive.

#### PPA

### **Organizational Chart Updates**

The functionality for viewing and moving around within the organization chart has been improved. The chart should now populate automatically based on the company setup. There has also been a pink help button added to the top right of the page to help users in the event their Organizational Chart is not populating as they expected. Note: Any "orphaned employees" who do not report to anyone, will not show up in the chart.

The copy chart feature has been temporarily removed and will be back in a release or two when the functionality has been fixed.



# -solved

5 Orphan Employee	5 Orphan Employees 3 Circular Reports							an 2 Levels BI 3 Levels	ELP.	
				Recently Selected Employees	~					
				O Copy Organization	Chart					
				Karon Gilkoy President	5					
Scott Nikiel EVP of Res	6	Eric Johnston EVP of Commercial Banking	E.	Eugane Bregar EVP of Montpage	6	Fodrigo Rnik EVP of Private ViewEn	B	Joe Miler EVP of Openanter Banking	e.	
Bugana Drewis De of Securities	5	Bernard Clayborg VP of Commercial Pinance	E.	Jari Lukshart-Davis VP of Leans	6	Michael Partish Private Weath Mgr	Be	Meximen Gray VP of Conserver Finance	6	
MeganHend Human Resources Generalist	5	Amber Monek VP of Commercial Loans	B	Ann Pattorson VP of Ros	<b>B</b>	Westte Riggen Frivels Westh Mgr	E.	Joyce Taylor VP of Rest Estate	e.	
Carlos Silcan Trader	B	James Davis VP of Operations	B.	Kimberly Wilson Chief Criedt Officer	5	Shelly Packard Private Wealth Mgr	E.	Lorie Spallerberg VP of Cansamer Loans	5	
Donnell Carlson Dir of Socuritos	6					ZistkaHenson Privati Wasth Mgr	B	Bertrand Rhoads VP of Branch Operations	<b>B</b>	
						Rebecce Codel Private Weeth Mgr	E.			
						Toxid Bentrott Private Wealth Mgr	B			

#### Learn and Grow

### Assignments by Hire Date

Users can now choose to make assignments due based on the hire date of one or more employees. Users can choose:

- After hire date
- Before hire date
- Between hire dates

For example, a user can select multiple employees, select the "due date based on hire date" option, and set the due date interval. The system will automatically assign individual due dates for each employee based on their hire date.



## -solved

Hire Date Filter	
None	~
Due Date Settings	
Due Date by Hire Date	~
Due Date Interval	
Week(s)	~
Due Date Value	
5	
Evergreen 🗇	
No	~
Reset Progress On Send ⑦	
No	~

The screenshot below shows the "between hire dates" screen layout. The users get an extra date to choose from so they can further refine the employees selected.

Hire Date Filter	
Between Dates	~
Hired After Date *	
10/01/2023	
Hired Before Date *	
10/31/2023	
Due Date Settings	
Set Due Date	Ŷ
Due date:	
01/24/2024	
Evergreen ③	
No	v
Reset Progress On Send ⑦	
No	v
B SAVE ASSIGNMENT	
B SAVE ASSIGNMENT	



# -solved

### **Screen Updates**

Over the next few months, you will see that we are refreshing several screens, moving them to a more modern look using the new grid style that you have already seen on other newer screens. The overall functionality stays the same with some differences noted below.

This is an example of the new screen, where you can sort, filter, group, and view all pieces of information:

Prior Employment									
V Expand All Groups ^ Co	Ilapse All Groups 🕤 Clear Group	ing/Filters							
Drag a column header here to group by that column									
Employer	Job Title	Job Description	Start Date \downarrow 🍸	End Date 🍸	Ending Salary	Change Reason	Manager/Reference	Location	
ABC Finance Company	Project Manager		1/16/2012	6/25/2020		Reduction in staff			
Big Box Retailer	Stockperson		12/5/2010	1/15/2012	\$10.00 per hour	Finished school			

The screens that will be updated with this release:

- Client Management > Tables > Compensation Plans
  - Updated Grid Layout
  - Users can export data.
  - Added filtering for each column.
- System Management > Client Administration > Legal Misc Fields
  - A search bar was added.
  - Updated Grid Layout
  - Users can export data.
  - Added filtering for "Data Type" column.
- Employee Admin Tools > Employee Utilities > Employee Change Log
  - A search bar was added.
  - Updated Grid Layout
  - o Users can export data.
  - Added filtering for each column.
  - Users can now select multiple tables
  - The default date is now in the current month

