Audience Q&A Summary

Customer Webinar Series: Back Office to Humanforce Cloud

Q.1 How will we ensure we give customers sufficient time to transition?

Humanforce will give our customers advance notice via emails, release notes and in product notifications for any key screens or modules effected. We will also provide ample time to manage the change and transition the users to HF Cloud.

In order to determine which screens, we begin switching off, we will be reviewing usage data and trends and, in some cases, seeking customer feedback before we turn off some of the key features or screens.

We have started to turn off some of the screens, but these are mainly admin, low touch screens that will enhance the overall reliability of back-office.

We wish to migrate users to HF Cloud where there is functionality in HF Cloud, so we can continue to innovate and invest more to make things better and offer more capabilities.

Q.2 We currently use the rostering for all employees but have a special need with our remote area nurses. Is it possible to roster allowances across the employees for on call (i.e. one nurse per location per night) within the rostering system?

A: We have on-call rostering available with several configuration options to best suit your business needs. If you haven't set this up yet, I recommend either logging a support ticket or speaking with your account manager to discuss service offerings. Our expert consultants can help you scope and configure this for your business.

Q.3 Is it possible to save filtered views?

A: The filter options selected are saved so next time when you visit the same screen, you don't have to select it again. The same applies to grouping and the cell view options

Q.4 Can you print from Roster Manager yet, and when are the awards profile and cost centre mapping moving from Back Office?

A: Cost Centre Mapping is a work in progress. Please use the What's New section to get updates on roadmap items. Award profile configuration will be at a later stage. Roster Reports are available in Roster Manager at the moment, and we will be making improvements to existing reports to allow you to report and print

Q.5 Regarding Templates - we'd like to create a template for a single day and then apply that to any chosen day. Is this possible?

A: The system allows you to create a single-day template. However, you can only import a template on the same day of the week. you can create 1 template for 1 day, then make a copy for each day of the week and use it for now. We have it as an improvement in the roadmap.

Q.6 I How would you adjust the Award profile of an employee when they have a promotion (i.e. Changing from 1st-year Apprentice to 2nd-year apprentice their role remains as "Apprentice" just the Award profile needs changing in our system to suit pay rise)? We've only even updated this in the Back Office.

A: You can update employees' award profile assignments and rates within Humanforce web under Management > Employee > Employee Management. For more details, check out this article on Humanforce Help

Q.7 Roster Offer - Will this feature from Back Office now be available on Humanforce Cloud?

A: Roster Offer in the Back Office is available as Shift Confirmation in Humanforce Cloud.

Q.8 Shift confirmation, can this be set for just public holidays?

A: Yes, you can request confirmation for only shifts that fall on a public holiday

Q.9 We publish rosters in Back Office. When there is a public holiday, we have each employee tick the non-attended tick box which is time-consuming. What is on offer in Web to expedite this process? If we don't tick this box, all staff will be paid as if they worked the public holiday.

A: There are a few different options for paying employees for public holidays, but the specific controls depend on how your awards are configured. I recommended either submitting a support ticket or speaking with your account manager to discuss service offerings. Our expert consultants can help you scope and configure this in the best way for your business.

Q.10 We are currently in the process of upgrading to HF Cloud and in UAT are we able to have this added to our UAT environment?

A: Please raise it with your Humanforce project team or a support ticket to enable it.

Q.11 With the access levels for our managers, do all the current access we have set up for the rostering screen apply to the Roster Manager?

A: All existing permissions from current access are used. To help with the change management, we have also added separate permissions for Roster Manager access so you can enable the feature for a subset of users first before making it available to everyone.

Q.12 Is there a video that I can provide to my managers to go through all the features of Roster Manager?

A: We hosted a webinar on Roster Manager when it was launched earlier this year, which is available in HF Help via the link below. Alternatively, we do offer a training service that your organisation could consider too (linked below)

- Webinar link
- Training service

Q.13 What is the easiest way to find the unpublished shifts?

A: We have this in our roadmap to add a filter option for this in the status filter. Please watch out for the release notes.

Q.14 Is the Roster Manager available because we can't see it?

A: Roster Manager is available in our Cloud and is behind a permission. Please review your permission and enable Roster Manager and you will be able to view it. Click here to the help article

Q.15 Now in HF Back Office, we can pull out timesheets of a particular staff for longer periods like a year. However, in HF Cloud, the maximum period I can select is 2 months. Is there any alternative to this?

A: It's best to retrieve large amounts of data from a report. There are several built-in reports in Humanforce Web under the Reports section. Workforce analytics also allows you to build your own custom reports, which may be optimal in this use case. Click here to view the reporting options available in Humanforce Web

Q.16 How do we use the dept-wise Template Manager on the cloud?

A: Any department-based templates are available in the Template Manager in cloud. Please view the help article for more details.

Q.17 We import our leave balances via Data Exchange. Would this change if we moved to Web (leaving Back End)?

A: Leave Balance imports are available on the web as well under Integration Central. Data Exchange will continue to work and import the data even if you are using the web. We recommend transitioning over to the web for imports as well. Please discuss this with the support team to know more.

Q.18 Where do we change settings so we can access Roster Manager?

A: Roster Manager is available to our Humanforce Cloud customers by enabling the Roster Manager permission. This article takes you through how to enable it

Q.19 When I was testing the payroll module in HF web and it generated the 'Pay Type Export' file, it didn't include the cost centres for each record. When I run it in Back Office, the last column that generates gives a cost centre for that timesheet. On the web, it just gives a generic [1] along the entire column.

Is this intended or can I get it to generate cost centres somehow?

A: HF web supports the same export options as the Back Office and it can handle cost centres. Please raise it with our support and they will be able to resolve it or provide you better answer based on your current configuration.

Q.20 Do the payroll comparison reports appear for all users or just the user that created them?

A: Access to the payroll comparison report is based on access level permission, so it can be controlled per access group.

Q.21 Is there a way to use the comparison report that compares the actual hours worked and not the approved hours? The Annualised Salary in the HIGA is based on the actual hours worked. In HF the timesheet is approved as 7.6 hours, so the correct hours are paid in Payroll Metrics.

A: As long as you are capturing both the actual worked hours and the adjusted hours, then yes, the payroll comparison report that Jamie demoed is designed to show you this information.

Q.22 On Reports, is there a way to generate the Leave summary for the future?- Leave applied by staff, leave approved and declined, all at the same place to help us better on forecasting.

A: There are multiple built-in reports available in Humanforce Web under the Reports section. Workforce analytics also enables you to create your own custom reports. This article will walk you through the reporting options in Humanforce Web to help you select the best one for your needs. Click here to find more details on this topic

Q.23 Can manual interpretation be performed on Web?

A: Yes, manual interpretation can be performed. If however, you are consistently manually interpreting we suggest reaching out to support to minimise the manual intervention.

Q.24 Where do you make changes to the payments before exporting? Back Office we can double-click on an employee and make changes to the list of pay codes where needed

A: Within the process payroll screen, it is possible to apply manual interpretation by selecting a timesheet and clicking the "Manual Interpretation" button. After changes are made you must select "Save Changes" in the bottom right of the timesheet section to apply the changes. New timesheets can also be added in this area by selecting the plus button. If however, you are consistently manually interpreting we suggest reaching out to support to minimise the manual intervention.

Q.25 Where do I turn on the permission to access the Payroll Processing screen that is currently being talked about on the web?

A: If you have access to Payroll processing in the Back Office, you will have access to that in the web. Please review the Navigation menu options via the menu - Admin ==> Admin Config ==> Nav Manager and ensure you have the payroll screen enabled comparison report that Jamie demoed is designed to show you this information.

Q.26 Is there an estimated timeframe for when an event planner will be available in the front office?

A: We are progressing well with the event planner build in the web. We will be opening an early access program to select customers. Please reach out to us if you like to be notified of the early access program.

Q.27 In the Payroll process can we make changes to totals being paid per week or in the Daily Totals section? Also, can you add a timesheet entry when amid the pay run as well as edit? For instance, a person FT missing 1 hour, needs to be processed as a leave type, can we add a timesheet in the pay run so we do not have to leave the pay run?

A: Within the process payroll screen it is possible to apply manual interpretation by selecting a timesheet and clicking the "Manual Interpretation" button. After changes are made you must select "Save Changes" in the bottom right of the timesheet section to apply the changes. If however, you are consistently manually interpreting we suggest reaching out to support to minimise the manual intervention.

Q.28 Is there are view in Humanforce where we can see individual timecards for the fortnight so we can see the total hours worked?

A: There are multiple built-in reports available in Humanforce Web under the Reports section. Workforce analytics also enables you to create your own custom reports. This article will walk you through the reporting options in Humanforce Web to help you select the best one for your needs. Click here to find more details on this topic.

Q.29 Is there an equivalent report to Timesheet Summary?

A: There are multiple built-in reports available in Humanforce Web under the Reports section. Workforce analytics also enables you to create your own custom reports. This article will walk you through the reporting options in Humanforce Web to help you select the best one for your needs. Click here to find more details on this topic.

Q.30 How can I roster a single monthly shift and then merge a template in later without overriding the single rostered shift?

A: When importing a template into Roster Manager, the shifts within the template are added to any existing roster items. It does not override. If you want to start from scratch, delete all shifts before importing your template

Q.31 Will they ever make the leave approvals larger on screen? The actual grid is only about 10% of the available space on the screen and shouldn't need to side-scroll A:

Thank you for your valuable feedback. We appreciate your suggestions, and our team will review this and explore potential adjustments to improve the user experience.

Q.32 Do we have retro timecards set up in the new HF as we move from the old Time Target to the new HF Cloud so that old timecards can be amended and produce the correct award interpretation? and can also be exported the data once corrected?

A: When you transform to Humanforce Cloud, all your historical data remains in your database and fully accessible. This includes the ability to alter previous timesheets and re-process pay periods including producing exports of that data for payroll. If you are looking to find the difference between your historical pay run and the new one, the Pay Comparison report is the best option for this.

Q.33 Our business requires the option to sort leave requests by date and time applied. (First in, first served). Given the Request Details column includes text, this doesn't appear possible.

A: This is achievable through reporting within Workforce analytics, the leave request data source, easily displays this data and can be utilised in conjunction with the approvals page.

Q.34 Can you also show how to cancel the approved leave?

A: Depending on the employee's access level, a cancellation of approved leave may be requested. If the Cancel Leave Request button as outlined in step 5 is not present, this feature is not enabled and management will need to cancel the leave request on behalf of the employee. Click here to find the article within Humanforce Help.

Q.35 How do I check employees' leave balances?

A: You can review your employee's leave balance using the Leave Balance Report found under Reports > Availability. This data is also available in Workforce Analytics if you would like to create a custom report or dashboard.

Q.36 Where do we access the leave approvals screen?

A: If there are Leave Requests requiring action, there will be a Leave Requests Pending card added to your Home page. You can click on the card to be taken to the

Leave Approvals page, or you can navigate to Management > Availability > Leave Approvals to address the request(s)

Q.37 Is there a proposed date for the sunset and depreciation of Back Office?

A: Although there are no definitive timeframes to sunset the Back Office system at this stage, we do strongly encourage customers to start making the transition now. So, it isn't a question of "If", but rather "When" Back Office will cease. The deprecation will take place in a phased manner and more details will be communicated in the future

Q.38 Is there a date for the shift to HF Cloud?

A: Although there are no definitive timeframes to sunset the Back Office system at this stage, we do strongly encourage customers to start making the transition now. So, it isn't a question of "If", but rather "When" Back Office will cease. The deprecation will take place in a phased manner and more details will be communicated in the future.

Q.39 The timesheets screen does not flag duplicate shifts (like the authorisation screen does - they change colour). Is there a way to enable this?

A: A timesheet alert within your clock-in setting is required for this. Click here to view a help article that explains how to configure these alerts. Note that the timesheet screen also contains a filter to show only overlapping shifts for easy identification and resolution where an overlapping timesheet alert is shown in the alert list.

Q. 40 Can you export a full period of timesheets to Excel? We currently have to export from Back Office to a separate drive which takes so long and shuts down Humanforce while doing so

A: Raw timesheet data can easily be exported from Humanforce Web using Workforce Analytics. You can learn more about Workforce Analytics here. The "Timesheet Data (BuiltIn)" dashboard will give you all the columns relating to timesheets or you can create your own dashboard with just the details you are interested in and the order you want them.

Q.41 As we use different Payroll software, how can we manually add Annual leaves or personal leaves to Humanforce?

A: Leave Balance Imports can be performed on a one-off basis by uploading a file from your computer, or on an ongoing basis by targeting files uploaded to your Humanforce sFTP folder. If you wish to enable the sFTP file import process, please log a ticket on Humanforce Help so that our Support Team can enable this functionality for you. This article will walk you through how to create and run a Leave Balance Import file through the Integration Central.

Q. 42 How do you edit Award Profiles online?

A: If you are referring to how to update employees' award profile assignments within Humanforce web. You can do so under Management > Employee > Employee Management. For more details, click here to the article on Humanforce Help.

If you are referring to Award configurations - currently, there are no specific dates set on the product roadmap for when the ability to change award interpretation will be available in HF Web. Since award configurations are primarily managed by the Humanforce team, this feature is prioritised last on our migration roadmap.

Q. 43 Will auto-allocate be available on Humanforce Web?

A: Auto Allocate is scheduled to be part of our Demand Driven Rostering roadmap. We anticipate this feature will be available between January and June 2025.

Q. 44 Can we adjust the Leave entitlement in the web application? Currently, we are adjusting them in the Back Office.

A: Unfortunately, at the moment, it's not possible to manually adjust leave balances through the web UI. However, this feature is on our roadmap for the future.

As a workaround, we recommend using the leave balance upload feature available through Integration Central. Click here to learn how to create and run a Leave Balance Import file through Integration Central.

Q. 45 What about other items such as data exchange, updating default hours, and updating cost centres (GL codes) to roles?

A: Employee data Imports can be performed on a one-off basis by uploading a file from your computer, or on an ongoing basis by targeting files uploaded to your Humanforce sFTP folder. Click here to view an article that will walk you through how to create and run an employee details Import file through the Integration Central.

Q. 46 Do we need to change to cloud from web-based?

A: Transitioning to the Humanforce Cloud is recommended. The cloud version ensures that you always have access to the latest features and enhancements demonstrated. The non-cloud web application lacks several key features that were highlighted in our recent webinar, such as advanced analytics and new pages for timesheets and rosters. These features are available exclusively in the cloud version.

Q. 47 When do you see the web version of the event planner becoming available? Will it be before you switch off the Back Office?

A: We are aiming to release equivalent Event Planner features into Roster Manager.

Q. 48 How do we download the roster for Inala Lodge, please? This is important for daily roster allocation.

A: There are multiple built-in reports available in Humanforce Web under the Reports section. Workforce analytics also enables you to create your own custom reports. This article will walk you through the reporting options in Humanforce Web to help you select the best one for your needs. Click here to find more details on this topic.

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Q. 50 We currently use Data Explorer in Back Office to import timesheets for a small number of staff - is there an option to do this in Cloud?

A: You have the option to create timesheets in bulk directly through the timesheet page, using different methods depending on the available data, such as from roster, from noshows, or from employees' default LDR assignment.

Q. 51 Are there any rough dates on the product roadmap for when changing award interpretation will be available in HF Web?

A: Currently, there are no specific dates set on the product roadmap for when the ability to change award interpretation will be available in HF Web. Since award configurations are primarily managed by the Humanforce team, this feature is prioritised last on our migration roadmap.

Q. 52 Not all employees can see the roster, can we change that so that all employees can access the roster without having the ability to change it?

A: This can be achieved through access level control. Depending on the data you want the employees to see, you can give them access to a report, the attendance page, or one of the rostering screens. I recommend logging a support ticket, and the team can assist you in finding the best option for your business.

Q. 53 Is it auto migration to Cloud or something we opt into?

A: Migrations to the cloud are carried out for each customer upon request. If you would like to begin your migration journey, please log a support ticket or contact your account manager to discuss your options.

Q. 54 How do we maintain templates and not specific rosters of a pay period?

A: There is a separate screen for the template manager which allows for the creation and editing of timesheets in a similar view to the roster manager. Click here to read more about the template manager here.

Q. 55 Will the integration feature to payroll software be available from HF Web or will we need to log into Back Office to perform the integration? (Integrating employee settings, etc)

A: Integration with third-party payroll solutions is being moved into the Humanforce web platform under Integration Central. Click here to find more information about the specific integrations available on the web today here. I also recommend reaching out to our support team, who can assist with any specific integration requirements.

Q. 56 I use Back Office for uploading payroll files to our payroll company. What is the pathway in Web to save your file?

A: Payroll files exported from Humanforce Web will be downloaded via your browser to the default download location of your computer, typically the dedicated "downloads" folder.

Q. 57 Will data explorer and ability to design reports be implemented in Web version? A: Report creation in Humanforce Web is done through Workforce Analytics, a powerful reporting tool that allows for visual and interactive dashboards far beyond what Data Explorer was capable of. Click here to learn more about Workforce Analytics here. You can also access video training here.

Q. 58 How do you edit Award Profiles online?

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Q. 59 How do we create the payroll file used to upload into a separate payroll software?
A: Please refer to the following article here. This includes the currently supported payroll systems. If your payroll solution is not included, please reach out to your account manager.

Q. 60 Can you split timesheets?

A: Yes, you can find an article on how to do this here

Q. 61 Will Shift Confirmation be able to send SMS if we have elected not to use the HF App just yet? We currently use Roster Offer SMS in Back Office and do not have the App yet. A: Shift offers and shift confirmation have a few different methods, SMS only, push only, push first or both push and SMS

You can read more in these articles

- Here
- Here

Q. 62 Will Humanforce be ready to apply public holidays every year in the system so that the clients won't have to do that every year?

A: Customers have different configurations of regions in Humanforce used for public holidays which makes it difficult to push these out centrally. However, Humanforce Payroll customers receive global updates of public holiday dates in Payroll which can then be integrated into their holiday calendar in Workforce Management.

Q. 63 With the payroll comparison reports, can you re-run them? You seem to have to create a new one every time.

A: Pay Comparison reports cannot be reprocessed. If you want to re-run the same period you will need to create a new report for it.

Q. 64 When will the rolling rosters functionality be developed on Web?

A: The development of the rolling rosters functionality is part of our roadmap and is scheduled to take place between August and December 2024. *Please note roadmap timelines are always subject to change.

Q. 65 If we currently have a template for reporting in Data Explorer in Back Office, will those be easily converted to generating reports on Web? Or will we have to set up an entire workforce analytics dashboard from scratch to simulate that templated report?

A: Layouts in Data Explorer are not compatible with Workforce Analytics, so new dashboards will need to be created. This is as the functionality in Workforce Analytics far exceeds what was available in Data Explorer, allowing for the creation of fully interactive, visual dashboards, not just static data views.