humanforce

Audience Q&A Summary

Humanforce Customer Refresher Webinar: Back Office to Humanforce Cloud (session 2)

Data Explorer

Q.1 Will all the features available in Data Explorer be available in Humanforce Cloud?

Workforce Analytics in HF Cloud provides custom reporting capabilities similar to Data Explorer, with additional features such as interactive dashboards. Most Back Office features are already available in HF Cloud, and we're continually working to bring over the remaining functionality.

Q.2 When will Data Explorer be deprecated?

Data Explorer will be deprecated as part of the transition to Workforce Analytics in HF Cloud. For details on deprecation timelines, please follow the Cloud Transition article <u>here</u>.

Q.3 How do we get access to Workforce Analytics?

Workforce Analytics is included with HF Cloud and can be accessed directly through your HF Web platform. You can read more about Workforce Analytics and how to set it up <u>here</u>. If you encounter any issues or need assistance, please log a ticket with our support team <u>here</u>.

Q.4 Is Workforce Analytics an add-on feature?

Workforce Analytics is included with HF Cloud at no additional cost and is available to all customers.

Q.5 Will the Payroll Preview Report be made available through Workforce Analytics?

Payroll preview reporting can currently be done using the Pay Comparison Report functionality in HF Cloud.

Q.6 Our organisation uses Data Explorer in Back Office for analysing payroll data. Specifically, the pivot table for Payroll. Will this be available in Workforce Analytics?

Yes. Workforce Analytics in HF Cloud includes the payroll data source and provides functionality to build reports into pivot table formats. For guidance on creating pivot-style reports, please read more <u>here</u>.

Q.7 How will Data Exchange be affected by the deprecation of Back Office?

The Data Exchange functionality will be available through Integration Central in HF Cloud, ensuring seamless continuity for your processes. If you need assistance with setup or have specific concerns about your current workflows, please reach out to our support team for assistance, by logging a support ticket <u>here</u>, so we can provide tailored support.

Roster Manager / Rostering

Q.8 We only use Back Office to create rolling rosters. Will this function be available in HF Cloud?

Yes, rolling rosters are planned for development in HF Cloud. To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

Q.9 Will the view in the web on roster screens be expanded/updated to show a full fortnight/period? This is currently a restriction, particularly within Template Manager.

We've been working on small increments in Roster Manager to display more shifts on the screen, with further improvements planned for the future. To stay updated on our roadmap, product updates and new feature releases, please follow the What's page <u>here</u>.

Q.10 Is there a way to save rosters rather than publish each time, in the cloud environment?

Roster Manager in HF Cloud automatically saves all changes made. You can publish the roster when you are ready.

Q.11 How do we get Roster Manager in Cloud? Is that at an extra cost?

To set up Roster Manager, click <u>here</u> for more information and instructions. There is no additional fee for Roster Manager in HF Cloud.

Q.12 We use the auto-allocate function in Back Office. Will this be available in Humanforce Cloud?

Yes, we will be working on a broader Demand Driven Rostering functionality in the future, which includes auto-fill as part of its scope, with expansion beyond what is currently available in the Back Office. To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

Q.13 Will the drag and drop and visibility over unassigned shifts in Employee Rostering's current screen be replicated into the People View in Roster Manager?

Yes, we are planning on adding the ability to move shifts (in addition to the existing action of copying). To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

Q.14 Can we print rosters or get a pdf report from Roster manager?

There are various roster reports available directly within Roster Manager, accessible from the top-left menu. Additionally, Workforce Analytics allows you to create custom reports and dashboards, which can also be exported to PDF.

Q.15 Is the roster by role report sortable by Area?

The Roster by Role report does not support Area sorting. However, the Role View in Roster Manager allows you to group shifts by Area, listing all shifts within the selected Area together. Alternatively, you can create a custom report in Workforce Analytics if these options don't meet your needs.

Q.16 Can you filter labour groups under the employee tab in Roster Manager?

No, filtering labour groups under the People view is not available. However, in the Role View, you can group shifts by labour group, which will display all shifts within that group together.

Q.17 We currently use a 6-week roster. Is this available in Humanforce Cloud?

Yes, Roster Manager in HF Cloud supports opening rosters from 1 to 60 days, which includes 6-week rosters.

Q.18 Is the Roster Report by Role editable?

Yes, the built-in Roster Report by Role offers a variety of filters and settings to customise your report to include details like Roster Names, Roster Times, and Comments.

Q.19 With the Pay Comparison Report, can I access pay runs that have been created in the Back Office?

Yes, HF Cloud will display the same payroll data, even if it was processed in Back Office. For details on running the Pay Comparison Report, please read more <u>here</u>.

Q.20 Are there work instructions available on how to use/filter and action various tasks in Roster Manager?

Yes, you can find detailed instructions for using Roster Manager, including filtering and task actions, <u>here</u>.

Q.21 'What's new' has suggested that Roster Manager is a like-for-like equivalent for Event Planner. Is there another product you'll be releasing, or is this what customers should use?

The Event Planner functionality will be built within Roster Manager. Some features have already been released, with more to come in future. To stay updated on our roadmap, product updates and new feature releases, please follow the What's page <u>here</u>.

Q.22 Are we able to open multiple departments at once in a view?

We are currently developing this functionality, and it is planned for a future release in HF Cloud. To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

Q.23 What about employee work patterns? For example, we have our part-time employees' default work pattern in Back Office.

In the web version, our approach is to leverage Workforce Analytics for reporting needs rather than exporting data directly from action-based screens like Employee Management, Timesheets, or Rosters. Workforce Analytics provides robust filtering, sorting, and export capabilities, ensuring a more streamlined and centralised reporting experience.

Q.24 Will Humanforce Cloud replace the current Humanforce Website?

Humanforce Cloud is our SaaS web solution, and the majority of our customers are already using it. You can easily check if you are on the Cloud version by looking at the version number displayed at the bottom left of your web application. If it starts with a 6, you are on Cloud. If not, please log a support ticket <u>here</u>, or speak with your Account Manager to discuss an upgrade.

Integrations & Payroll

Q.25 Does the list of Payroll Programs that Humanforce Cloud will integrate with include ReckonOne?

Our product team are actively working on replicating all payroll export options available in Back Office. If your business uses a generic output, it will already be available in HF Cloud. If you cannot locate it, please reach out to our support team for assistance, by logging a support ticket <u>here</u>. Additionally, ReckonOne integration is supported natively in HF Cloud for seamless employee synchronisation. Click <u>here</u> for more details.

Q.26 Humanforce integrates with a range of payroll programs, including ReckonOne, however, we use Reckon Accounts, not ReckonOne. Humanforce Back Office currently generates a "Quickbooks "iif file" that we upload into Reckon Accounts. What impact the Back Office EOL will have on us.

Our product team are actively working on replicating all payroll export options available in Back Office. If your business uses a generic output, it will already be available in HF Cloud. If you cannot locate it, please reach out to our support team for assistance by logging a support ticket <u>here</u>. Additionally, ReckonOne integration is supported natively in HF Cloud for seamless employee synchronisation. Click <u>here</u> for more details.

Q.27 Are there any updates on the Humanforce integration with Datacom?

We have made enhancements to the Datapay integration, which is currently being piloted with selected customers. If you're interested in joining the pilot program, please log a support ticket <u>here</u>, and our team will reach out to assist you.

Q.28 There is currently an integration button in Back Office to synchronise databases with third-party payroll. Where is this available on the web interface?

Integration Central in HF Cloud manages all database synchronisations with thirdparty systems. For help with setting up your integrations, please log a ticket with our support team <u>here</u>.

Q.29 We use third-party integration via ETLs that import into Back Office overnight. Will this be affected, and will we need to change the way our import data works?

Existing integrations may need adjustments to align with HF Cloud's data import methods. Integration Central supports data exchange processes in the cloud. We recommend you log a ticket with our support team <u>here</u>, for a review of your setup.

Q.30 Is there a payroll integration into other payrolls or a leave integration from another payroll back into HF Cloud?

Payroll and leave integrations in HF Cloud are managed through Integration Central. More information is available <u>here</u>. If you're not seeing the options you need, please log a ticket with our support team <u>here</u>, so we can review your requirements and assist with setup.

Q.31 Is the export file still okay to import to The Access Micropay?

The Micropay configuration from the Back Office will continue to work in HF Cloud. Our product team is currently working on transitioning the payroll setup screens into Integration Central for improved accessibility. For updates on timelines and new feature releases, please follow the What's New page <u>here</u>.

Q.32 Can I confirm that the pay run will be processed in the Cloud instead of Back Office?

Yes, whether you are using HF Payroll or generating an export for another payroll system, you can process pay runs directly from HF Web. Read more about exporting pay runs to third-party payroll systems <u>here</u>. If you have concerns about your specific configuration, please log a ticket with our support team <u>here</u>, for further review and assistance.

Q.33 We are using WageEasy as our payroll system. How do we integrate this into WageEasy?

Generally, pay exports configured in Back Office should work the same in HF Cloud. Read more about exporting pay runs to third-party payroll systems <u>here</u>. If you have concerns about your specific configuration, please log a ticket with our support team <u>here</u>, for further review and assistance.

Q.34 We export the timesheets in a format that MYOB can read. Will this be available?

Yes, Workforce Analytics in HF Cloud allows you to build custom exports, enabling you to replicate the specific format required by MYOB. If you need assistance setting this up, please reach out to our support team for assistance, by logging a support ticket <u>here</u>.

<u>Services / Training</u>

Q.35 What features are currently not implemented in Cloud that are in Back Office? If one were to switch ahead of time.

For a comprehensive overview of features and their cloud equivalents, please review the Cloud Transition article <u>here</u>.

Q.36 Does the cost of the training sessions vary?

The service packages come at an additional cost. For more details on pricing and available options, please log a ticket with our support team. You can also find more information <u>here</u>.

Timesheets

Q.37 I there any plan to enable the functionality of directly exporting timesheet data from this screen rather than using Workforce Analytics?

At this time, there are no plans to enable direct exporting from the timesheet screen in HF Cloud. However, we understand the importance of this feature and are currently investigating its feasibility. Please note, that timesheet exports are available through Workforce Analytics, offering flexible reporting options.

Q.38 Can you export from the Timesheet screen?

Yes, timesheet data can be fully exported through Workforce Analytics, allowing you to select specific columns and export to Excel.

Q.39 Will there be UX improvements to the timesheets page in Humanforce Cloud?

We are constantly working on various UX improvements for the Timesheets page in HF Cloud. If you have specific suggestions or concerns, please submit feedback through the Timesheets page feedback button.

Q.40 Is there a maximum limit on the amount of data that can be exported simultaneously in Cloud base?

There are no enforced limits for data exporting. However, we recommend the scope of data exported to be within a reasonable date range. We've also been making several enhancements to improve performance in the web version. If you continue to experience issues, we recommend logging a support ticket <u>here</u>, so we can investigate the exact cause.

Q.41 Are there any plans to increase the items per page in the timesheets screen?

Increasing the number of items per page is under consideration. However, due to the volume of data involved, there are challenges around maintaining performance. We are also working on broader performance improvements to optimise loading times.

Q.42 Will we be able to report on the clock times of breaks?

Reporting on clock times of breaks is not currently available but is being reviewed for future enhancements. We recommend logging a ticket <u>here</u>, to prioritise this feature.

Q.43 How do you see if the timesheets are overlapping?

Overlapping timesheets in HF Cloud are flagged with alerts. You can learn how to set up these alerts <u>here</u>.

Q.44 How about importing timesheet data through HF Cloud?

Timesheet imports will be available via Integration Central in a future release in HF Cloud. To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

Q.45 Could you tell us when auto-filling is likely to be available on the web?

Autofill functionality is planned for later this year as part of the broader Demand-Driven Rostering enhancements. For updates, please follow the What's New page <u>here</u>.

Q.46 When we process payroll, are we able to amend the time sheets in the payroll processing screen? I have noticed that this is not possible at the moment in Humanforce Web.

Yes, HF Cloud supports in-line editing of timesheets within the pay run screen for adjustments like pay start and end times or shift types. However, for the best experience, we recommend making timesheet edits in the Timesheet screen prior to running payroll whenever possible.

Q.47 Will API importing timesheets be done via HF Cloud?

Humanforce's REST API allows you to create and update timesheet data in HF Cloud. To learn more about our API and its capabilities, read more <u>here</u>. If you have specific requirements or need assistance with API setup, please log a ticket with our support team <u>here</u>.

<u>Awards</u>

Q.48 Will we have access to Award Profiles in the HF Cloud?

Award functionality is planned for a future release in HF Cloud. To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

Workforce Analytics

Q.49 Are workforce analytics reports created for similar organisations in the same field available to other organisations? For e.g. QFR reporting, Care minutes reports, printable weekly roster?

We already offer a range of built-in dashboards based on the most commonly used reports, which might address some of your needs. Additionally, we'll share your suggestion with our product team for consideration as we continue to enhance Workforce Analytics capabilities.

Q.50 Are we able to automatically send reports/dashboards to select managers without the need to export the report/dashboard?

Yes, managers can be granted view access to Workforce Analytics dashboards. You can also apply restrictions to control which employees they can see. For more details on sharing and distributing custom reports, read more <u>here</u>.

Q.51 Will the Audit Module be available through HF Cloud?

The Audit Module is planned for a future release in HF Cloud. To stay updated on our roadmap, product updates and new feature releases, please follow the What's New page <u>here</u>.

<u>Alerts</u>

Q.52 Where can we access the details on all alerts - both custom and standard?

You can find detailed information on Roster Alerts, including both custom and standard configurations, in this help article <u>here</u>.

Q.53 To get alerts on the timesheet screen, is there a setting that needs to be turned on?

Yes, timesheet alerts are configured in the Clock-In settings. You'll need to enable the specific alerts you want to use. For more details, read more <u>here</u>.

Q.54 Looking for the overtime roster alert – is that available under the clock-in settings too?

The overtime alert is automatically built in and triggers when the pay type is configured as overtime. We are planning to enhance this functionality further with clock-in setting controls in future. To stay updated, please follow the What's New page <u>here</u>.

<u>General</u>

Q.55 What is Humanforce's approach to handling exceptions to the Back Office deadlines (Modules or Platform End of Life)?

Whilst we emphasise the importance (and indeed the benefits) for customers in expediting their transition to HF Cloud, we recognise that in some circumstances, flexibility may need to be considered or applied for individual customers. For this reason, if you believe you have specific concerns or requirements, we would like to hear from you. For example, if you have unique requirements or believe your organisation faces exceptional circumstances, please reach out to your Humanforce representative to discuss further and how an individual treatment or extension might apply.