Staff Management Infinity Portal | My Infinity Portal

Version 08.04.00
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1.1 Significant innovations

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1.2 Important aspects

Please note that for the proper functioning of the scheduled processes performed from the Portal, when used, it is necessary to verify by means of the "*Settings*" functionality (*From*: *Application areas - Control panel – Scheduling)* that the scheduler of the Portal is "*Enabled*" *(ticked value); in some particular cases, the latter can appear NOT "Enabled" (unticked value).*

1.2.1 DMS container

Please note that for the "DMS Container" IT IS NECESSARY TO:
SET THE SAVING PROCEDURES OF THE PATH INDICATED BY YOU IN DMS - SETTINGS AS "CONTAINER".
(From: Application areas - Workspace – Settings – Document archive – Settings).

THIS IS NECESSARY BECAUSE THE ABOVE MENTIONED PATH IS THE ONLY PLACE IN WHICH DOCUMENTS ARE STORED (*Payslips, Timecards, etc.*) AND FROM WHICH DATA WILL BE RETRIEVED TO BE DISPLAYED IN "Employee Folder – Personal Documents" and/or "Organizational folder".
IN CASE THE "CONTAINER" IS LOST OR CORRUPTED, THE DATA RELATED TO ALL THE PERFORMED PUBLICATIONS WILL NO LONGER BE RETRIEVABLE.

2 TRANSLATIONS IN LANGUAGE

The dictionary of the version in question is aligned and available in the following languages:
English (ENG), Spanish (SPA), French (FRA), German (DEU), Polish (POL), Portuguese (POR), Simplified Chinese (ZHO).

3 GRAPHICS

As of this update, for a graphic and/or ergonomic evolution the following graphic improvements were performed:

Portal header

In the Portal header, the functionalities already in use such as "*Sidebar*", "*Application notifications*" and "*Connected user*" will be shown as in the image; by positioning the cursor on the image, the text of the functionality will appear and by "clicking" on the image the functionality will be accessed.
Please note that the functioning of the above-mentioned graphically revised options will remain unchanged compared to what was used previously.

Pages

In order to better highlight the "Pages", both "Standard" and "Customer", available in the "Workspace" application area, as of this update, the latter will be displayed centrally more highlighted.
Please note that the functioning of the above-mentioned "Pages", graphically revised, will remain unchanged compared to what was used previously.

Welcome message

In the *"Welcome message",* available in the *"MyWork"* standard page of the *"Workspace" application area,* the *"Welcome"* greeting was replaced by *"Ciao",* for the Italian users; for the non-Italian users *"Ciao"* will be displayed translated in the language of the connected user.

Please bear in mind that as of this update the used graphic font is changed; the used font will be "Proxima Nova", at 13px.
Moreover, keep in mind that the size of the font is not changed compared to the previously used one; the "Proxima Nova" font makes the character more legible.

4 GRAPHIC OPTIONS

(From: Application areas - Control panel - Settings - Setting).
As of this update, in order to support the user in the management of the options related to the graphics of the Portal the *"Graphics options"* functionality was graphically revised by adding in it the new *"HUB"* containing the logo present in the "HUB" and "Login" section contain the options related to the images and to the logos that were previously indicated/managed in the "*Logo*" section of the *"Setting" (Da: Application areas - Control panel - Settings).*
Please note that the functioning of the above-mentioned options will remain unchanged compared to what was used previously.

Please also note that, during the upload of this update, an automatic conversion will report what was already indicated in the "Logo" section, available in "Setting" in the new "Images and logos/Login" section of the "Graphics options", order to maintain the previous functioning.

5 CHANGE LOGO

As of this update, in order to allow the User to authorise other users/groups for the "*Change logo*" and/or "*Delete logo*" functionalities, where considered necessary, the latter will be manageable from the *"Menu settings" (From Application areas - Control panel - Security)*.

Keep in mind that the "Change logo" and/or "Delete logo" functionalities will be active by default only for the users belonging to the Group 1 Zucchetti Admin, as already previously in use.

6 ORGANIZATIONAL FOLDER

(From: Application areas - Workspace)
As of this update, in order to help the User in managing the documents in the "*Organizational folder*", the following improvements were added:

6.1 Filters and new options/information

Search filter by "Main folder"
As of this update, in order to support the User in the consultation of the folders available in *"Organizational folder",* the new functionality *"Search"* was added, which allows searching by description of the *"Main folder"* within the letter selected from the *"alphabetical toolbar".*
The search will be applied starting from the typing of the third character within the new "*Search*" field.
Please note that in order to remove the search filter on the folder description, no content must be indicated. Moreover, please keep in mind that the new "Search" functionality will be available in the "header " of the Organizational folder both in "Current" and in "In archive".

Massive options (Confirmation message)
In order to support the user in the verification of the selection of the documents that will be considered in the functionalities of the "*Massive options*" the information related to the number of the documents that will be considered was added in the "*Confirmation*" message of the functionalities.

Search filters in "grid"
As of this update, the "*Search filters*" indicated in the "*grid*" will be considered in the execution of the "*Massive options*" functionalities as well.

Document description
The new option *"Organizational folder – View additional description"* was added in the *"Publication options"* of the "*Setting" (From: Application areas - Control panel)"*, which, if selected, *(ticked value)* allows displaying in the *"File description"* column what was indicated in the *"Publication form"* preset to Zucchetti in *"DMS-Archiving - Additional document description"* (*From: Application areas - Workspace - Publication management – Publication form)*.

Keep in mind that for the Publication forms preset to Zucchetti, for which the "DMS-Archiving - Additional document description" indication was not provided, the displayed description will correspond, as already previously in use, to the "Organizational folder - File name" indicated in the "Publication form" (From: Application areas - Workspace - Publication management - Publication form).

Moreover, keep in mind that when uploading the update the new "Organizational folder – View additional description" option (From: Application areas - Control panel – Setting) will not be activated (unticked value) in order to maintain the previous functioning.

Document name
The information related to the name of the document was added in the "layer" available on the row of the document available in the "*Organizational folder*"; the name of the document will be filled in with what is indicated in the "*File name*" of the related "*Publication form*" in the "*Organizational folder*" section (*From: Application areas - Workspace - Publication management - Publication form*)

Moreover, the information related to the name of the document was added in the "layer" available on the row of the document published to *"Personal documents"*.
The new option "*EMP - File name*" will correspond to the "*File name*" indicated in the "*Publication form*" in the "Personal documents" section (*From: Application areas - Workspace - Publication management – Publication form)*.

6.2 Documents uploaded manually

Publication period
As of this update, in order to manually add documents to the "*Organizational folder*" will be mandatorily necessary to indicate the dates of the "*Publication period*"; the latter will be filled in by default at the uploading of a new document with effective date from 01-01-1800 and end date until 31-12-2999 in order to maintain the previous functioning; the User will have to indicate, where necessary, the validity dates different from the suggested default.

Keep in mind that, in the upload phase of this update, an automatic conversion will indicate the default values for the documents that were manually updated previously without indication of the "Publication period", for the 01-01-1800 effective date and the 31-12-2999 end date, in order to maintain the previous functioning.

Notification
As of this update, the User who adds the document manually, will be able to send, when necessary, a notification to the recipient users of the document, in order to notify them about the presence of a new document to be consulted in the *"Organizational folder" (please refer to Summary of new notifications)*.
The notification will not be sent automatically following the upload of a new document in the "*Organizational folder*", but it will be the User's responsibility, when necessary, to send it manually by selecting the dedicated "*Notification*" icon positioned alongside the selected document.
Keep in mind that the sent notification will not contain the manually uploaded document as attachment.

Moreover, as far as the manual documents are concerned, the "Organizational folder - Notification" functionality will be active only for users belonging to the Group 1 Zucchetti Admin; the User, member of that group, will be responsible for activating such functionality, when necessary, also for other Groups/Users operating suitably with the "Security" (From: Application areas - Control panel - Security).

6.3 "ZIP - Download documents in folder" functionality

As of this update, in order to help the User in using the functionality in question, the following improvements were applied:

- The download of the documents will be completed even in the presence of possible discarded documents; previously, the download was completed at the first discarded document, if available.
- In case there are discarded documents, a CSV file will be produced containing the information related to the document, form, path and motivation of the discard of the document.

Keep in mind that if the "ZIP – Download documents in folder" functionality is performed in scheduled mode, the possible list of the discarded documents, if available, will be consultable from the "Management of reports" functionality (From: Application areas - Data management - Personal Data - Task management).

7 ARCHIVING/PUBLICATION TO ORGANIZATIONAL FOLDER

(From: Application areas - Workspace - Publication management)

As of this update, where the User will consider it necessary, it will be possible to add in archiving and/or publication of the documents in "*Organizational folder*" the Company security groups *(From: Application areas – Data management – Contacts – Companies)* that are not yet available on the folders as they were indicated subsequently to the previous archiving and/or publication performed for the documents.

To this purpose, it will be necessary, where needed, to activate (*ticked value*) the new option *"Add DMS/OF authorizations", available in the "Publication options – Security" section in "Setting" (From: Application areas – Control panel – Setting).*

Please note that the "Add DMS/OF authorizations" option will be filled in by default with "No" (Unticked value), and it will be the User's responsibility to activate it, when necessary.
Moreover, keep in mind that the Company security groups, already available previously on the folders containing the documents will not undergo any changes, even if the "Add DMS/OF authorizations" option is active.

8 AUTOMATIC USER CREATION

(From: Application areas - Workspace – Settings – Users and groups).

As of this update, for the functionality in question, the following improvements were applied:

8.1 Graphic revision

The functionality in question was revised bot graphically and ergonomically in order to help the User in its use.

To this purpose, the selection method of the "*Data for user creation - User name*" was also changed in order to ease the selection and the search of the information.

The information related to the *"Notify", "Contact typology", "Create user from", "Template user" and "Additional filter" was also added in the already available list of settings.*

8.2 Additional filter

The new section "*Additional filter*" was added, visible only if the "*Create contacts from*" option is filled in with "*Only contacts with Employment*", which, where the User considers it necessary, allows indicating additional filters compared to the ones already indicated in the "*Selection parameters*" section in "*Setting*" already previously in use.
The additional filter allows indicating the values related to the following fields available in the Employment Personal Data (*From: Application areas - Data management - Employment*) such as:

Branch
Local unit
Cost centre
Department
Division
Business unit
Contract
Sector
Qualific.
Level

Keep in mind that the additional filter will be resolved on the execution date of the "Automatic creation of users" in case it was defined as "Automatic", the filter will be resolved on the execution date scheduled by it.

8.3 Types to consider and/or exclude

As of this update, it will be possible to consult and/or force the contents preset to Zucchetti, already previously in use, related to the standard Subject types to consider and/or to the employment classes not to consider, for the selection of the person's contacts of the "*Automatic creation of users*", by accessing the new related functionalities of "*Consider Standard Subject types*" and "Exclude employment classes".

Keep in mind that the functioning of the "Consider *Standard Subject types*" and "*Exclude employment classes*" remains unchanged *compared to the previously already in use and that in the upload phase of this update, an automatic conversion will add in the respective new tables the values already used on the system*.

8.4 Type by user name

The new type "Surname + Initial of the name" was added for the creation of the user name.

9 FIRST ACCESS LOGIN INFO

As of this update, in order to support the User in the sending of the notification of the first access login info, the possibility of sending the notification containing the first access login info even via SMS was added.
The SMS notification is considered both by using the "*Automatic creation of users*" with login info notification, and by using the "*Enable user with credentials notification*" functionality (single and/or massive) from the "*Delegate users*".

In order to activate the above-mentioned notification, when necessary, the User will be in charge of selecting the type of notification sending wanted by the "*Access details*" publisher (*See Summary of new notifications*), available in the "*Publisher*" functionality *(From: Application areas - Control panel - Settings - Notifications - Publisher); the definition of the "HRERM_CREATEUSR" publisher will be automatically created when uploading this update.*
Please keep in mind that, only the "Email" option will be activated by default in order to keep previous functioning.

Keep in mind that for the automatic creation of users, the "Exclude persons without e-mail address/Cell phone" option, if activated (Ticked value), will allow the creation of Users only for the contacts who present the e-mail address or the cell phone number based on what was added in the creation notification topic (HRERM_CREATEUSR); in case both the e-mail notifications and the SMS one are present, the users, for whom at least one of the two contact data is indicated, will be created.

10 DELEGATE USERS

As of this update, in order to support the User in activating devices for using the mobile APP, a new single and massive functionality was added entitled "*APP – Management of user devices*", which allows managing the activation of the devices already present in the "*Activation of devices/users*" (*from Application areas – Control Panel - Mobile –Devices*).
The use of the "*APP - Activate devices/user*" functionality allows selecting the following actions, such as:

Send user's certificate
By selecting this option, all the certificates with "*Pending*" status will be displayed.
Subsequently, by selecting "*Confirm*", an e-mail with the active certificate will be send;

Revoke user's certificate
By selecting this option, all the certificates with "Valid" status will be displayed.
Subsequently, by selecting "*Confirm*", all the selected certificates will be revoked;

Remove user's certificate
By selecting this option, all the certificates with "*Pending*" status will be displayed.
Subsequently, by selecting "*Confirm*", all the selected requests will be deleted.

It is also specified that the "Send user's certificate", "Revoke user's certificate" and "Remove user's certificate" will be, by default, active only for the users belonging to the Group 1 Zucchetti Admin.; the User, member of that group, will be responsible for activating this functionality, when necessary, for other Groups/Users as well, operating properly with the "Menu settings" (From Application areas - Control panel - Security).

In order to support the User in selecting users, as of this update, the filter applied in the grid, in case all the users are selected, will also be considered.

11 ACKNOWLEDGMENT OF COMMUNICATIONS/DELEGATE COMMUNICATIONS

As of this update, in order to support the user in the verification of the reading of the published communications, the new ”*Communications - Acknowledgement*” and “*Delegate communications - Acknowledgement*” functionalities were added (*from Application areas - Workspace - Settings - Application gadgets - Communications*), which allows displaying the list of the users who have acknowledged the communication.
The “*Communications - Acknowledgement*” and “*Delegate communications - Acknowledgement*” functionalities will generate, depending on the applied filters, a file containing the list of the Users enabled and authorised to the communication, who have viewed or not the selected communication.

Note that, the "Delegate communications - Acknowledgement” functionality in the “Communication code” field will allow only the selection of the communications that were created by that User.

Moreover, the "Communications - Acknowledgement” and “Delegate communications - Acknowledgement” functionalities will be active only for users belonging to the Group 1 Zucchetti Admin; the User, member of that group, will be responsible for activating these functionalities, when necessary, also for other Groups/Users operating suitably with the "Menu setting” (From: Application areas - Control panel - Security).

12 NOTIFICATIONS

As of this update, the possibility to send the e-mail notification only to the contact data indicated as “*main*” in the “*Person's contact*” (*From: Application areas - Data management - Contacts)* was added.
In order to use the management, it will be necessary to activate the “*Use only main address*” option (*Ticked value*) present in the “*Address for notifications - User notifications*” of the “Setting” (*From: Application areas - Control panel”) and in this last case, if activated, the e-mail notifications will be sent only to the “Main” contact data present in the person's contact.*
Keep in mind that, in case the contact data is not present, the notification will not be sent as the e-mail address of the recipient is not present.
Moreover, when uploading the update, the new “Use only main address” option will not be activated (unticked value) in order to keep the previous functioning.

12.1 Notifications management

<u>Recipient's e-mail address</u>
As of this update, in order to mainly detail the print of the notifications in CSV, the new “*Recipient's e-mail address*” information was added within the print, which indicates the contact data to whom the e-mail notification was sent.

<u>Edit of notification text</u>
As of this update, in order to support the User in the consultation of the system application notifications, the notification text regarding the error from the e-mail notification sending was changed in order to indicate the Tax code and the related e-mail address of the contact to whom the notification was not delivered (*See Summary of new notifications*).

12.2 Cumulative notifications

As of this update, in order to allow the User to diversify by company the notification text related to the "*Cumulative notifications*" functionality, a new parameter was added in the "*OF - Cumulative notifications*" scheduled process.
The "*Company contacts to be processed*" parameter allows indicating the company contacts to whom to send the cumulative notification using a message template present in the scheduling parameters.
Moreover, this parameter is automatically added during the update phase and, in order to keep the previous functioning, it is filled-in with "*000000000000000*".

13 PROCESSED QUANTITIES

(From: Application areas - Control panel - System).
As of this update, in order to support the User in the consultation of the "*Processed quantities*", the following improvements were made to the functionalities in question, such as:

- The possibility to display and/or export the processed quantities for the entire/partial selected year was added; previously, it was possible to export only a single month of the selected year;

- It was added the possibility to have available the "*HR Licenses: expiration date and quantity controls*" explanatory document from the "*Processed quantities*", which is related to the counting applied for determining the processed quantities, by "clicking" on the appropriate "*Help for licenses and quantities*" image present in the "header".
  Please note that, the "HR Licenses: expiration date and quantity controls" document is also published in the "Post-sale portal" in MyZucchetti;

- The new "*Verify license calculations*" section was added that is visible only for the Customers in Use license or in PAAS, which will allow consulting and/or exporting, by year and/or HR application, the average quantities of the processed quantities of the previous years to the one in progress;

- The selection method of the Company in the filter was changed, in order to allow the User a simpler view/search of these.

14 DMS – USED SPACE

(From: Control Panel – System)
As of this update, in order to support the User in the verification of the quantity and of the "*weight*" of the documents present in the Document archive, the possibility to verify the used space was made available.
The "*DMS – Used space*" functionality (*From: Control Panel – System*) will allow the User to view the information related to the total "*Number of documents*" and to the "*Size*" with their detail by document creation "*Year*".
Moreover, the displayed values are to be considered as "illustrative".

Please note that the "DMS – Used space" functionality will be allowed by default only to the users belonging to the group 1 Zucchetti Admin.; in order to allow its use to other Groups and/or Users, it is necessary to act properly within the "Menu setting" (From: Control panel - Security).

Furthermore, note that the display of this menu is allowed only to the users belonging to the security group "999111 PortalCounts".

15 ASSENTS AND CONSENTS

As of this update, when the user considers it necessary, it will be possible to activate the notification of the "*Assents and Consents*" and of the "*Delegate assents and consents*" publication by using the appropriate new "*Notify*" option, which is available in the "*Authorizations*" section of the definition of the assents and consents.
The publication notification of the company communication will be sent from the "*Start date/time*" publication of the latter, to the users and/or to the group users for whom the "*Yes*" value (*ticked value*) was indicated in the "*Notify*" option.
The "*Delegation/assents and consents*" topic will be automatically created and it is useful to the selection of the notification type to be sent during the configuration phase of an assent and consent.
Automatically, the notification will be set only with the "*Application*" type; the User will be in charge of changing this setting, when necessary (*See Summary of new notifications*).

In order to activate the sending of the notification, besides performing the operations from above, it will be necessary to activate the "*Notification scheduling for Assents and Consents/Delegation of assents and consents*" scheduled process.
The scheduled process will be automatically added with this update; the User will be in charge to activate it and verify its predefined settings by means of the specific "*Processes*" functionality (*From "Application areas – Control Panel - Scheduling*).
The scheduled process is unique both for the notifications from "*Delegate assents and consents*" and for those from "*Assents and Consents*".

In order to define the text to be used during the sending of the notification, it will be possible to specify the message template for each assent and consent by specifying it in the "*Message form code*" field present in the definition of that assent and consent, or by using for all assents and consents the same message template indicating the "*Message form code*" in the "*Communication notifications - Notification of assents and consents*" of the "Setting"(*From: Application areas - Control panel - Setting*).

If no message template is present, the notification with default subject and text will be sent:
Subject: "New assent and consent"
Text (If the validity sending date is filled-in): "The assent and consent '%4' was published on %1
Please acknowledge it"
Text (If the validity sending date is null): "The assent and consent '%1' was published.
Please acknowledge it"

Moreover, automatically, the new "Notify" option will be indicated with the "No" value (unticked value) for all the users and/or groups present in the Authorizations section of the definition of the "Assents and consents", the User will be in charge of indicating a different value, when necessary.

16 DIGITAL STORAGE

(From: Application areas - Workspace - Document archive - Digital storage)
In order to support the User in the verification of the documents for their "*new*" sending in digital storage by means of the "*Shipping*" functionality, it will be possible to obtain, by "*clicking*" on the number indicated in the grid of "*No. of documents that can be sent*" and "*No. of doc. that cannot be sent*", the related list of documents taken into account with the possibility to export it through the specific "*Export*" functionality.

As of this update, the "*Set form*" section was removed, which was previously present in the "*Filling-in of attributes*", as it was no longer used.
Moreover, it will be necessary to perform the setting of the intermediary for the classes of the tax statements related to the 2017 tax year, in case the archiving was performed before the generation of the electronic file.

17 PUBLICATION FORMS

(From: Application areas - Workspace - Publication management)
As of this update, it is possible to archive and/or publish the following documents, generated by:

17.1 Omnia

ISA control print (CONTRISA)

17.2 Electronic receipts

(From: Application areas - Workspace - Publication management - Settings)
As of this update, it is possible to archive and/or publish the following Electronic receipts:
Form 770/19

18 MASS CHANGE FOR FORM RESET

As of this update, the following improvements were made to the *"Mass change for form reset"* functionality:

18.1 Person's contact selection

As of this update, in order to support the User in the selection of the contacts for whom to change the form forcing, the possibility to also select contacts with "Person" classification was added.
If the "*Special publication authorization/Activate management (Person's contact)"* option, available in the "Publication options" section of the "*Setting*" (*From Application areas/Control panel*), is active (*Ticked value*) and in the configuration of the massive change, the "*Include natural person businesses" (IND/PER Classification)"* option present in the "Filter" section is activated, it will be possible to view the contacts with "Person" classification authorised to the publication in the "Select company" section as well.

18.2 Selection of company from file

As of this update, in order to support the Users in the selection of the companies for which to massively change the form forcing, it was added the possibility to import these companies from file in order to show in the list only the companies in question.
In the "*Mass change for form reset*" functionality, already present in the previous versions, the "Companies from file" value was added for the "Selection type" field; by selecting this value, it is given the possibility to

upload a file in CSV format that contains the list of the companies that is to be viewed in the "*Select company*" section.
The file that is uploaded must be in CSV format and each row must contain the information related to a company, in the following order:
Company contact tax code
Company contact classification code
Company contact code (optional)

19 ACCESS LOG

(From: Application areas - Control panel - System)
As of this update, in order to support the User with the consultation of the accesses performed by the users to the applications available on the system, the "*Display accesses*" functionality was added.
The "*Display accesses*" functionality will allow the display and/or export of all the accesses performed by the users for the applications available on the system, by access type (*Login, Logout and Failed login*) and period.

It will also be possible to configure through the new "*Access log*" functionality (from: Application areas – Settings –Sttings – Setting) the "*No. of storage days" (values accepted from 1 day to 366 days) and the "Data tracing type" ("All users" or "Administrators only"); "Data tracing type" to "Administrators only"* means that the accesses will be registered and they can be consulted only by the users belonging to the Group 1 Zucchetti Admin.
When uploading this update, by default, the "*No. of storage days*" will be filled in with 45 days and the "*Data tracing type*" will be filled in with "*All the users*" in order to keep the previous functioning.

Please keep in mind that the configuration change will be effective only after the restart of the Portal application as indicated by the appropriate "Please note that the indicated configuration will be valid from the next application restart" warning message, which will be shown when the configuration itself is saved.

Please also note that the "Display accesses" and settings "Access log" functionalities will be visible and usable only by the users belonging to Group 1 Zucchetti Admin.

20 MANUALS

(From: Application areas – Data management – Settings - Personal Data - Manuals)
As of this update, in order to support the User with the consultation of the manuals available in portal, the possibility of viewing the manuals translated in English was added.
If the User's language is Italian, the manuals will be shown in Italian; vice versa, if the User uses the portal in a language different from "Italian", the content of the manuals will be translated in English.

21 - DIGITAL SIGNATURE

(From: Data management – Signature management)

21.1 Management of signature certificate

As of this update, in order to help the User in creating and managing the signature certificates, the following improvements were applied:

__Management of signature certificate - External activation__
As of this update, in order to "*limit the proliferation*" of certificates for the same employee, it was changed the mode with which the new signature certificates are defined.
Specifically, if the "*External activation*" option is selected during the "*New request*" phase and a certificate in "*Activated*" and/or "*Registered*" status with "*External activation*" already exists for the indicated user, the "*Send the request*" functionality is disabled issuing the *"Certificate with result "Activated" / "Registered" already present for the selected user"* message.

__Management of signature certificate - Certificate company identification__
As of this update, in order to identify in detail the Reference company of the Signature certificate, if necessary, it will be possible to transmit to "*Zucchetti Certifica*" the information related *to "VAT no.", "Reference country code"* and *"Company's register no.".*
With this purpose, the new information related to "*Reference country code*" and *"Company's register no."* was added in the "Personal Data" section of the Company/Corp. Personal Data (*From: Data management - Personal Data*).

Please note that the above-mentioned information is not mandatory for the registration of a certificate; it will be up to the User to fill it in, if necessary.

For further information regarding the management of new attributes, please refer to the "Staff management digital signature" document, available in the reserved area.

__Management of signature certificate - Management of organization-Contractors__
In order to support the User in managing the certificates for the Contractors, as of this update, the new information was added within the definition of Contractors' organization (*From*: *Data management - Settings - Signature management - Contractors*), such as the "*VAT no", "Reference country code" and "Company's register no.".*

Please note that the above-mentioned information is not mandatory; it will be up to the User to fill it in, if necessary.

For further information regarding the management of new attributes, please refer to the "Contractors – Digital signature" document available in the reserved area.

21.2 "Signature" Gadget
As of this update, in order to support the User in managing the documents to be submitted to "Signature", the documents that have a certificate in "Registered" or "Activated" status will be made available in order to avoid the necessity of archiving again and publishing the files in case the certificate activation was performed in the "*External activation*" mode and the RAO/IR operator has not yet updated the certificate result.

Please note that it will be possible to display the "document signature" icon and to perform the actual signature only if the employee's certificate is in "Activated" status.

22 ENTERPRISE DIGITAL FOLDER

(*From: Data management – Personal Data – Enterprise digital folder)*
As of this update, the following improvements were applied to the *"Enterprise Digital Folder"* functionality:

22.1 Characteristics

As of this update, in order to support the User in archiving on DMS the documents useful for "*Enterprise Digital Folder*", it is now possible to configure new types of attribute through the "*Characteristics*" functionality (*From*: *Data management - Settings - Personal Data - Enterprise Digital Folder - Characteristics*), such as:

"EMP - Employment type description" type
It will allow filling in the corresponding attribute based on the "*Employment type*" code indicated through the "*Input*" functionality (*From: Data management – Personal Data – Enterprise Digital Folder).*

"EMP - Employment class description" type
It will allow filling in the corresponding attribute based on the "*Employment class*" indicated through the "*Input*" functionality (*From: Data management – Personal Data – Enterprise Digital Folder).*
Please note that the "EMP - Employment class description" and "EMP - Employment type description" attribute types will be used only in document "Input" phase.

"EMP - Employment class" type
It will allow filling in the corresponding attribute with the "*Employment class*" information indicated in the "*Employment/Staff*" section of the Employment (*From: Application areas - Data management - Personal Data*) through the "*Input*" functionality (*From: Data management – Personal Data – Enterprise Digital Folder).*
The "*EMP - Employment class*" attribute information is available both in the document "*Input*" and "*Search*" pages (*From: Data management – Personal Data – Enterprise Digital Folder).*

"EMPL - Hire date" type
It will allow filling in the corresponding attribute with the "*Hire date"* information indicated in the Employment selected through the "*Input*" functionality (*From: Data management – Personal Data – Enterprise Digital Folder).*

"EMPL - Termination date" type
It will allow filling in the corresponding attribute with the "*Termination date*" information indicated in the Employment selected through the "*Input*" functionality (*From: Data management – Personal Data – Enterprise Digital Folder).*

Please note that the "EMPL - Termination date" and "EMPL - Hire date" attribute types will be used only during the document "Input" phase and they will be filled in with the "Hire date" and/or "Termination date" information available in the selected Employment.

22.2 Categories

As of this update, in order to support the User in managing the "Categories/Sub-categories" (*From*: *Data management - Settings - Personal Data - Enterprise Digital Folder*), the following options were added:

Sub-category sorting

It was introduced the possibility of managing the sorting for each added "*sub-category*".
Please note that the sorting, if indicated, acts in both displays ("*With list" and/or "With tree"*) of the "*Search*" of documents and in the related "*Download selected documents*" and "*Print the list of documents*" functionalities.

Sub-category authorizations

It was added the possibility of indicating the "*Accesses*" for the Users/Groups added by choosing between the "*Granted*" and/or "*Denied*" values in the authorisations of subcategories.

Please also note that during the upload of this update, an automatic conversion will set the "Granted" option to the authorizations of each already available subcategory in order to maintain the previous functioning.

22.3 Input and Search

In order to support the User in the input and search of documents originating from *Enterprise Digital Folder*, the following improvements were applied:

New reserved security group

(From: Workspace - Settings - Users and groups - Security groups)
In order to support the User in managing the documents originating from *Enterprise Digital Folder*, as of this update, the new reserved security group *"999140" (PortalEnterpriseDigitalFolder)* was added.
The latter will be reported in the "*Permits*" of the documents imported through the "*Input*" functionality of the *Enterprise Digital Folder (Da: Data management – Personal Data – Enterprise Digital Folder - Input).*
The definition of the reserved security group "999140" (PortalEnterpriseDigitalFolder) will be automatically created when uploading this update.

Please also note that an automatic conversion during the uploading phase of this update will add the "999140" group (PortalEnterpriseDigitalFolder) with the authorisations to "Yes" in the "Folder permissions" and "File permissions" section of the documents related to Enterprise Digital Folder in the Document archive (From: Workspace - Document archive - Document management).

Subcategory initialisation

As of this update, in order to support the User with the input of the information useful for the upload and search of documents from Enterprise Digital Folder, the reference "*sub-category*" will be automatically initialised if only a subcategory is available for the previously selected category.

Please note that the information of the "sub-category" will be filled in automatically both during "Input" and "Search" phase of documents.

Report customisation

As of this update, if necessary for the User, it will be possible to customise the output of the reports generated through Enterprise Digital Folder.
In order to be able to customise at "*graphic*" level the "*List of documents - Enterprise Digital Folder" and "Summary - Enterprise Digital Folder*" reports, it will be necessary to access PortalStudio (*From: Control Panel - System*) and to save a copy of the "*standard*" report with the performed modifications.

Please note that the standard reports must be overwritten, but a "copy" with the customised reports must be created.
Please also note that the customisation can be managed only by the Users belonging to group 1 Zucchetti Admin.

Document preview

As of this update, in order to support the User in verifying the document imported from *Enterprise Digital Folder*, the new "*Preview*" functionality was added, which allows displaying the content of the document in question.
The "*Preview*" button beside the "*Document name*" within the "*Document properties*" of the *Enterprise Digital Folder* is available both from the document "*Input*" and "*Search*" functionality (*From: Data management – Personal Data – Enterprise Digital Folder).*

Please note that during the "Input" phase of documents, the "Preview" functionality will be visible if the "Input - Activate the edit of the document properties" option is enabled in the "Enterprise Digital Folder" section of the Setting (From: Control panel - Setting).

Please also note that the "Preview" functionality of the document will be visible for the Users who are authorised to perform the search on the Enterprise Digital Folder and who were previously authorised to the "Search - Preview" functionality (From: Control panel - Security).

Category change

As of this update, in order to support the User in managing and modifying the information of documents imported from *Enterprise Digital Folder*, the new "*Category change*" functionality was added.

By selecting the "*Category change*" functionality, it will be possible, if necessary, to modify the "*Category/Subcategory*" and the source "*Publication form*" with a "*Category/Subcategory*" and destination "*Publication form*".

Please note that if equal attributes are available between the "source" and "destination" form, the latter ones will be reported as filled in within the destination form.

The "*Category change*" button beside the '*Document name*' within the "*Document properties*" of the *Enterprise Digital Folder* is available both from the document "*Input*" and "*Search*" functionality *(From: Data management – Personal Data – Enterprise Digital Folder).*

Also, please note that the use of the "Category change" functionality is allowed by default only to the users belonging to the Group 1 Zucchetti Admin.; in order to allow its use to other Groups and/or Users, it is necessary to act properly in the "Menu configuration" (From: Control panel - Security).

Search - Display of results

As of this update, the "*classic*" display of the information contained in the grid of the Enterprise Digital Folder search results was restored both in the "*List of documents*" and "*Summary of documents*" section, by showing the entire information of the documents even of the same category and subcategory indicated in "*Input*".

Please note that the "classic" display is reported on the list of documents both in the "With list" and "With tree" displays.
Please also note that this display was also performed for the related "List of documents - Enterprise Digital Folder" and "Summary - Enterprise Digital Folder" reports.

23 DATA EXTRACTOR

As of this update, the possibility of using, if necessary for the User, two new output formats for the data extractor was added: PDF/A and DOCX.

These formats can be selected within the "E*dit*" functionality, available in "Extraction definition" (*From: Application areas – Data management – Settings – Data extractor*). By creating a new extraction, the PDF/A format is selected by default; it will be up to the user, if necessary, to select the other output formats.

If they are selected in the extraction definition, these formats must be configured within the "PDF/A-DOCX" section, available in the "*Forms*" functionality.
It is also specified that the configuration of the "PDF/A" and "DOCX" formats is enabled only for users belonging to the Group 1 Zucchetti Admin; the User, member of that group, will be responsible for enabling such feature, when necessary, also for other Groups/Users, operating suitably on the "Security" (From: Application areas - Control panel - Security).

The "PDF/A" and "DOCX" formats can be selected during the execution phase, if provided for the extraction, from the corresponding "Data extractor" menu item (*From*: *Application areas – Data management*).

For further details on the configuration of forms for the new output formats, please refer to the dedicated manuals on the Data extractor available in the "Manuals" menu item (From: Application areas - Data management - Settings - Personal Data)

24 ORGANIZATION

(From: Application areas – Data management – Organization).
As of this update, the following improvements were made to the *"Organization"* module:

24.1 Graphic revision

As of this update, in order to help the User in managing the options available in the definition of the organizational form (*From*: *Application areas - Data management - Settings - Organization - Tables - Organizational form),* the "Definition" section was graphically revised; the fields previously available in the "Definition" section have been reorganized into different sections, such as:

<u>Model management</u>
It contains the options related to the configuration of the functionalities available in the "Model management" and to the "Occupational statistics" functionality;
<u>Alignment parameters</u>
It contains the options related to the "Staff data" and "Access profiles" alignments;
<u>Display parameters</u>
It contains the options related to the display of the "View organization chart" and to the previous displays;
<u>HR Human resources application</u>
It contains the options related to the alignments of the *Human resources management*; this section is visible only if the application is available in the system.
<u>HR payroll application</u>
It contains the options related to the alignments of the *Payroll Project* application; this section is visible only if the application is available in the system.

<u>Model management</u>
(*From Application areas – Data management – Organization*)
This update brought the graphical revision of the method for selecting the organizational form in which it is necessary to select the provided launch parameters (Organization chart and Processing date) directly from the list.
The "*Processing date*" parameter allows selecting on which reference date to display the organizational form.
The "*Description...*" functionality was also added, and it allows searching by the description of the organizational form; this search is applied starting from the typing of the third character.
Please note that in order to remove the search filter on the organizational form description, no content must be indicated.

<u>View organization chart</u>
(*From Application areas – Data management – Organization*)
This update brought the graphical revision of the method for selecting the organizational form in which it is necessary to select the provided launch parameters (Organization chart, Processing date and View collaborators) directly from the list.
The "*Processing date*" parameter allows selecting on which reference date to display the organizational form;
The "*View collaborators*" parameter allows the User to choose whether to display in the outline the collaborators available in the boxes or to hide them. If the option is deactivated, only the managers will be displayed in the outline.
The "*Description...*" functionality was also added, and it allows searching by the description of the organizational form; this search is applied starting from the typing of the third character.

Please note that in order to remove the search filter on the organizational form description, no content must be indicated.

Setting of access profiles
(*From Application areas – Data management – Settings - Organization - Utility*)
This update graphically revised the method for selecting the organizational form in which it is necessary to select the provided launch parameters (Organization chart and Processing date) directly from the list.
The "*Processing date*" parameter allows selecting on which reference date to display the organizational form
The "Description..." functionality was also added, and it allows searching by description of the organizational form; this search is applied starting from the typing of the third character.
Please note that in order to remove the search filter on the organizational form description, no content must be indicated.

24.2 Short description for roles and organizational elements

As of this update, it is possible to define the "*Short description*" within the definition of "*Organizational positions/units*" and of "*Roles*".
The "*Short description*", if filled in, is displayed in "*View organization chart*", both for the role and for the organizational box, instead of the extended description.

Please note that in order to keep the previous functioning, the "Short description" will not be filled in by default; the User will be responsible for filling it in, when necessary.

24.3 Track the manager in the level below

(From: Application areas - Data management - Settings - Organization - Tables - Organizational form)
As of this update, the new "*Track the manager in the level below*" option was added in "*Organizational forms definition*", in the "*Form management*" section; if activated (ticked value), it allows reporting the managers of the box as managers of the organizational boxes below, in which no manager is encoded, both in the "*Form management*" and in the alignments related to the "*Human resources management*" application.
If the "*track the manager in the level below*" option is not activated (unticked value), the managers that were reported in the organizational positions below are not displayed in the "Form management" and considered during the alignment phase of the groupings of *Human resources management* application.

Please note that, in order to keep the previous functioning, the "Track the manager in the level below" option will be filled in by default with "Yes" (ticked value) when the "Display manager in the level below" option is active; instead it will be filled in by default to "No" (unticked value) if the "Display manager in the level below" option is not active.

24.4 Export

(From: Data management – Settings – Organization – Utility - Export)
As of this update, the new elements, useful for the export of the Subjects managed in the organization chart, were added in the "*Setting*":
For the managers:
    Task code

Task description
Entity code

For the collaborators

Task code
Task description
Part-time %

<u>Data export from Webservice</u>

As of this update, only from the Webservice (hvor_bexporgsched), a new parameter (*pFLGETFILE*) was added to the "Organization chart export" functionality, which, if it is manually added by the User and filled in with "S", reports in the webservice execution results the content of the exported file, besides generating that file in the export path as previously used.

Please note that, in order to keep the previous functioning, if the new parameter (*pFLGETFILE*) will not be available or filled in, only the export path file will be generated.

24.5 - Approver type

As of this update, in order to give further details regarding the managers available in the organizational form, the new "*Approver type*" information was added, allowing to define the approval level of the managers, such as:

General approver
Main approver
Approver

It is also mentioned that for all the managers previously added in the organizational form, the "*Approver type*" will be filled in with "*Approver*".

24.6 Import

(From: Application areas – Data management – Settings - Organization - Utility)

As of this update, it will be possible to import in the organization chart the information available in the "*Staff data alignment*" section of the "*Organizational units*" and "*Organizational positions*" definition (*From: Application areas – Data management – Settings - Organization - Tables)*

Keep in mind that the above-mentioned information can be imported for the "A04 – ELEM_ORGAN" module.

As of this update, it will also be possible to import in the organization chart the new "*Secondary level*" information available in the "Authorisations" section of the manager; such information can be imported only for the "B12" module.

For further details regarding the layouts and the position to be used, please refer to the related "Record layouts" document, available in the "Data import" (From: Application areas – Data management – Settings – Organization – Utility – Data import).

24.7 Secondary approver

As of this update, in order to give further details regarding the approval of managers available in the organizational form, the new "*Number of levels secondary*" information was added in the "*Authorisation*" section, allowing to define the number of approval levels of the secondary managers.
During the input of a new manager, the "*Number of levels secondary*" information is filled in for all the managers with the value of the corresponding "*Number of levels secondary*" field available in the "*Groups*" section of the organizational form definition (*From Application areas - Data management - Settings - Organization - Tables - Organizational form*).
During the alignment of the groupings related to Time and Attendance Workflow, for the approvers that must be marked as secondary, the related option will automatically be activated in the grouping (*From Application areas – Data management – Settings - Organization - Utility - HR WorkFlow - Groupings*).
Please note that the new "*Number of levels secondary*" information, available in the "*Groups*" section of the organizational form definition, is automatically filled in with "*From value*" and 0 levels managed, in order to keep the previous functioning.

24.8 New view organization

(From: Application areas – Data management – Organization - View organization chart)
As of this update, in order to have a more accurate vision of the data contained in the boxes and in the staff, besides a faster search method and an organization chart print displayed in PDF format, the "View organizational chart" was implemented.
Please note that, this functionality does not replace the previous ones, "Synthesis organization chart" and "Detailed organization chart", which can now be consulted from the dedicated menu items (From: Application areas – Data management – Organization - Previous views)

"*View organization chart*" provides the composition of the organization chart, starting from a given organizational box selected by the User, showing the boxes and the Subjects within it, grouped in cards for each collaborator or manager; the cards related to the organizational boxes contain the main manager of the box and they will be highlighted with the "*Manager*" inscription, which will not be available in the collaborators' cards.
Each card, related to the manager and collaborator, will contain the following information that, if available for the Subject, will always be visible:

- Organizational box description
- Subject's name
- Subject's photo
- Role description
- Replacement name, *the main replacement of the Subject is displayed*
- External key, *the external code of the organizational box is displayed*
- Part-time %, *the percentage available in the employment is displayed*

The display of the organization chart outline is managed from the new options added in the "*Display parameters*" section of the "*Organizational form*" (*From Application areas – Data management – Settings - Organization - Tables*), such as:

- View vacant evidence

The option allows the User to highlight the cards related to the organizational boxes that do not contain any defined manager.
Please note that, in order to keep the previous functioning, the "View vacant evidence" field will be automatically filled in with the related value, available in "Previous view".
View undersized evidence
The option allows the User to highlight the cards related to the organizational boxes in which a "Staff" is defined in the "Form management" with a number of provided persons higher than the number of active persons.
Please note that, in order to keep the previous functioning, the "View undersized evidence" field will be automatically filled in with the related value available in the "Previous view".
Display type
The option allow the User to choose the grouping type of the collaborators available in the outline by choosing one of the provided options.
Please note that, in order to keep the previous functioning, the "Display type" field will be automatically filled in with the related value available in the "Previous view".

It is also mentioned that, in order to keep the previous functionalities of "*Synthesis organizational chart*" and "*Detailed organization chart*", the display options related to the latter were kept and grouped in the "Previous display" section, available in "*Display parameters*"

In order to facilitate the navigation of the organization chart outline, dedicated utilities were added, such as:
Model
The "*Model*" displays the tree of the organization chart and it allows selecting the starting node from which to develop the outline; the "Search" functionality allows searching within the tree only by the description of the organizational box. In order to use more filter values, it is possible to use the search functionality that allows searching within the entire organizational form by the provided values.
Search
The "Search" utility allows searching the information available in the card within the outline. The "*Simple search*" allows searching any information in the outline; the "*Advanced search*" allows setting multiple search filters in order to obtain more precise results.
The simple search and the advanced search are used alternatively, the results of the two are independent from one another.
Print
The "Print" utility allows generating a file in PDF format, containing the outline of the selected organizational form. By activating the export of collaborators, if there are more than 4 collaborators in a box, an additional page is generated at the bottom of the document, containing the detail of the collaborators.
Legend
The "*Legend*" utility shows the graphic inscriptions accompanying the organizational boxes that are vacant, undersized or perspectival; such inscriptions are visible only if there is at least one card with that type in the outline.

25 BPM

(From: Data management – Settings – Processes)

As of this update, in order to support the User in managing the BPM processes, a modification was performed on the selection method of the Users/Groups in the functionalities of the module.
For the functionalities:

- Process definition
- Processes desk
- Processes panel

It will be possible to indicate only the Users/Groups available in the "HR Delegation" section of the logged User (*From: Workspace – Settings – Users and Groups – Users).*

26 ADVANCED SEARCH

In view of a continuous ergonomic evolution, in order to support the User in the immediate use of the Portal functionalities, as of this update, the Portal header will display the new "*Search*" functionality, which will allow an immediate search and display of the gadgets contained in the standard pages and the Portal functionalities accessible from the menu, excluding the functionalities contained in the "*Settings*" (...) menu; **the search will extract, however, only the gadgets and/or the menu items to which the User is authorised.**
The "*Advanced search*" will be performed after the input of the first three characters and it can also be performed vocally, using the Chrome browser, if the latter allows it.

Please note that, currently, the following Portal gadgets are excluded from the search:

Favourites
Statistics and Reports
Product link
Application updates
Communications

Moreover, please note that the "Advanced search" functionality will be active only for the users belonging to Group 1 Zucchetti Admin; the User, member of that group, will be responsible for activating this functionality, when necessary, for other Groups/Users as well, by operating suitably with the "Menu setting" (From: Application areas - Control panel - Security).

27 VIRTUAL DESK MANAGEMENT/VIRTUAL DESK

(From: Application areas – Workspace)
As of this update, the following improvements were made to the functionality in question:

27.1 Support for Requests (*Virtual desk*)

(From: Application areas – Workspace)

WARNING!

In order to be used, the technical prerequisite of the Support for Requests is that the system be configured with version Oracle Java 8 JDK 1.8.xx or OpenJDK 8 JDK 1.8; otherwise, even if the "Intents" are indicated, the functionality in the Virtual desk will not be available.
The Support for Requests is currently available only in Italian.

As of this update, when the User considers it necessary, it will be possible to define the support topics (*Intents*), addressed to the applicant user of the virtual desk, useful for providing him/her immediate answers to questions related to recurring topics and/or topics in use.

<u>Intents</u>
(From: Application areas - Workspace - Settings - Application gadgets - Virtual desk)

For the purpose of the functionality in question, it will be possible to define the support topics (*Intents*), indicating as well, when necessary, the possible document and/or explanatory video to be provided together with the requests related to the support topic/intent (*Intents - General* section).
It will be necessary to enable the topic/intent to the security groups that include the users targeted by the topic/intent (*Intents - Authorizations* section).
It will also be necessary to indicate the text of the answers related to the topic/intent, which are to be provided based on a request (section *Intents - Answers*), with the possibility of diversifying the answers according to the affiliation security group of the user receiving the answers ("*Authorizations*" button).

After defining the "*Intent*", by clicking on it in the grid, it will be possible to continue with the input of the possible "*Phrases*" that are expected by the applicant in reference to the answers of the previously added topic/intent.
By clicking for each phrase on the "*Processed*" button, the phrase will be automatically decomposed and it will be the User's responsibility to indicate the "Key" words, useful for suggesting the answers related to the topic/intent.
Please note that in the "Phrases" section, it is necessary to add grammatically correct complete phrases.

It will also be possible to add the "*Quick commands*" with phrases that do not have a grammatically correct structure, but they still refer to the intent they belong to.

Please note that if Authorisations are not indicated for the Topics/Intents, the latter will be used for answering to all users who submit requests.
Moreover, please note that if Authorisations are not indicated for the Answers, the latter will be used for all users.

<u>Massive actions</u>
(From: Application areas - Workspace - Settings - Application gadgets - Virtual desk - Utility)

In order to support the User in managing the "*Intents*", the "*Utility - Massive actions*" functionality was added, allowing to massively enable/disable the selected intents and/or to reset the count of the "*Like*"/"*Dislike*".

Please note that the "Intents" and "Utility - Massive actions" menu items are enabled only for the users belonging to Group 1 Zucchetti Admin.; the User, member of that group, will be responsible for activating this functionality, whenever necessary, for other Groups/Users as well, by operating suitably with the "Security".(From: Application areas - Control panel - Security).

For the detail of the "Intents" functionality, please refer to the dedicated "Portal – Documentation – Support material – Virtual desk-Support for Requests" document, published in the "After-Sale Portal" in MyZucchetti.

Virtual desk
In the Virtual desk in "*New request*" indicating the question, the answer will be automatically displayed on the right side, if provided/configured as Intent/Phrase.
By clicking on the support answer, it will be possible to access the possible document/video that accompanies it and indicate the satisfaction with the related "*Like*" and "*Dislike*" buttons.

27.2 Display category (*Virtual desk management*)
The new "*Virtual desk management - Display category*" option was added in the "*Virtual desk*" section of the "*Setting*" (*From: Application areas - Control panel - Setting*), which, if active (ticked value), allows displaying the "*Category*" information in the "*grid*" of the tickets available in the "*Virtual desk management*".

Please note that the "Virtual desk management - Display category" option can be used only as an alternative to the "Display additional data" option, the latter having already been used.
Please note that the "Virtual desk management - Display category" option will be filled in by default with "No" (unticked value); it will be the User's responsibility to change this setting, when necessary.

28 PERSONAL ASSISTANT
(From: Application areas – Workspace)

WARNING!
In order to be used, the technical prerequisite of the Personal assistant is that the system be configured with version Oracle Java 8 JDK 1.8.xx or OpenJDK 8 JDK 1.8;
The Personal assistant is currently available only in Italian.

In view of a continuous ergonomic evolution, in order to support the User in the immediate use of the Portal functionalities, as of this update, the "*Personal assistant*" was added.
Currently, if requested, the Personal assistant can answer the following "*Intents*":

> *List the company communications*
> If requested, it will answer the user with the list of his/her own communications, not yet archived, contained in the "Current" section.

<u>Display the activities that are yet to be completed</u>
If requested, it will answer the user with the list of his/her own activities.

<u>Read the daily timestamps</u>
If requested, it will answer the user with the list of his/her own daily timestamps.

<u>Display the HR Workflow totalizers</u>
If requested, it will answer the user with the list of his/her own counters/totalizers.

In order to interact with the Personal assistant, it will be necessary to perform the request using for it at least two words.
The request can also be performed vocally, using the Chrome browser, if the latter allows it.

In order to use the "*Personal assistant*", it will be necessary to activate the new "*Activate management*" option, available in the "*Personal assistant*" section in "*Setting*" *(From: Application areas - Control panel - Setting).*
Please note that the "Activate management" option will be filled in by default with "No" (unticked value); it will be the User's responsibility to enable it when necessary.
Moreover, please note that the "Activate management" option is not editable if the above technical prerequisites are not fulfilled.

Thereafter, it will be necessary to enable, *deactivating the "Disable" option (unticked value)*, the "Intents" that are to be used by means of the new dedicated "*Intents*" functionality (*From: Application areas - Control panel - Personal assistant - Intents).*
Please note that, currently, the "Intents" that can be used by the "Personal assistant" are the Zucchetti default ones and therefore, it is not possible to create new intents.

The "Personal assistant" can be viewed and used only by the users belonging to Group 1 Zucchetti Admin.; the User, member of that group, will be responsible for enabling this functionality, when necessary, for other Groups/Users as well, by operating properly with the "Security" (*From: Application areas - Control panel - Security*).
Please note that, when enabled, the "Personal assistant" will always be available in the "footer" of the Portal as the "Additional services", already in use.

It will also be possible, when the User considers it necessary, to customise the name of the "*Personal assistant*" and/or its avatar image.
To this end, the new "*Setting*" functionality was added (*From: Application areas - Control panel - Personal assistant - Tables).*
Please note that in case there are no other indications from the User, the default name of the "Personal assistant" will be "ZED" (Zucchetti Employee Driver).
In order to allow the User to configure the customisation and/or mediation of the dialogue (*e.g. It is possible to configure phrases or words, due to which the dialogue will be cancelled, exclude the inappropriate words*

(offense, profanity, insults, etc.) from the dialogue, etc.), the "*Special phrases*" functionality was added in the Personal assistant (*From: Application areas - Control panel - Personal assistant - Tables*).
However, the "*Special phrases*" will be already partly provided as Zucchetti default; it will be the User's responsibility to change them or add new ones, when necessary.

In order to support the User in verifying the use of the phrases used by the Users who interact with the "*Personal assistant*", the "Statistics" functionality was added (*From: Application areas - Control panel - Personal assistant - Utility*), which allows viewing the detail, by User, of the phrase interaction.

29 SUMMARY OF NEW NOTIFICATIONS

Functionalities	Notification type (default)	Notification object	Notification text	Publisher
Organisational folder - Document notifications	*Application*	*Organisational folder - New document*	*Sender: %PERSON_NAME_SURNAME% Document: %OF_DOCUMENT_NAME%* *%TEXT_TYPED_BY_SENDER%*	*HRERM_FONOTIFYDOCUSR*
Notifications - Incorrect or missing address	*None*	Error while sending the notification via E-MAIL (%TopicDescription%)	"Address not available" (Displayed if the e-mail address and tax code are not filled in)	*HRERM_CFGNOTIFY or CONFIGURATION*
Notifications - Incorrect or missing address	*None*	Error while sending the notification via E-MAIL (%TopicDescription%)	"Address not available (Recipient %CFISC%)" (Displayed if the tax code is filled in and the e-mail address is not available)	*HRERM_CFGNOTIFY or CONFIGURATION*
Notifications - Incorrect or missing address	*None*	Error while sending the notification via E-MAIL (%TopicDescription%)	"Invalid %EMAIL% address" (Displayed if the e-mail address is not valid and the tax code is not filled in)	*HRERM_CFGNOTIFY or CONFIGURATION*
Notifications - Incorrect or missing address	*None*	Error while sending the notification via E-MAIL (%TopicDescription%)	"Invalid %EMAIL% address (Recipient %CFISC%)" (Displayed if the e-mail address is not valid and the tax code is filled in)	*HRERM_CFGNOTIFY or CONFIGURATION*

Best regards

ZUCCHETTI
HR Division