HR new experience Post update actions

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Introduction

You're now ready to try out the new HR experience!

Here's a reminder of all the benefits that come along with it:

- **A modernised user interface** with a fresh, intuitive look
- **Standardised navigation** for a consistent, smoother platform experience
- **A version switcher** lets you toggle between old and new interfaces for a seamless transition, minimising disruption
- **Action-oriented menus** improve efficiency, helping users get more done faster
- **Self-serve branding** lets you control your software's appearance without our support
- **Improved two-factor authentication (2FA)** setup and user experience
- **New sign-in** and email-based login for a streamlined, user-friendly experience
- **Self-service single sign-on (SSO) configuration** with third-party providers like Microsoft and Google
- **In-app guidance** provides real-time support to end users and admins, improving efficiency for all

Click here for a reminder of the new features in action.

Actions

Now you've been updated to our new Sign-in experience, there are **five** important steps you'll need to complete to start enjoying the new HR experience:

1. **Enable new pages for HR users in Role management**:
    - Branding configuration
    - Login account status page
2. **Enable the new experience for user roles**: choose who you'd like to have access to try the new experience within Role Management > Details
3. **Check login account status, starters and leavers**: check users have synced with Sign-in as expected
4. **Branding checks:** check you're happy with how this has applied to your HR system
5. **Next steps:** Learn how to create and disable sign-in accounts for starters and leavers

This guide walks you through the steps you need to complete to try out the new experience.

Remember our new in-app guidance will also walk you through the necessary actions step-by-step, and is always available by clicking the help icon whenever you need it.

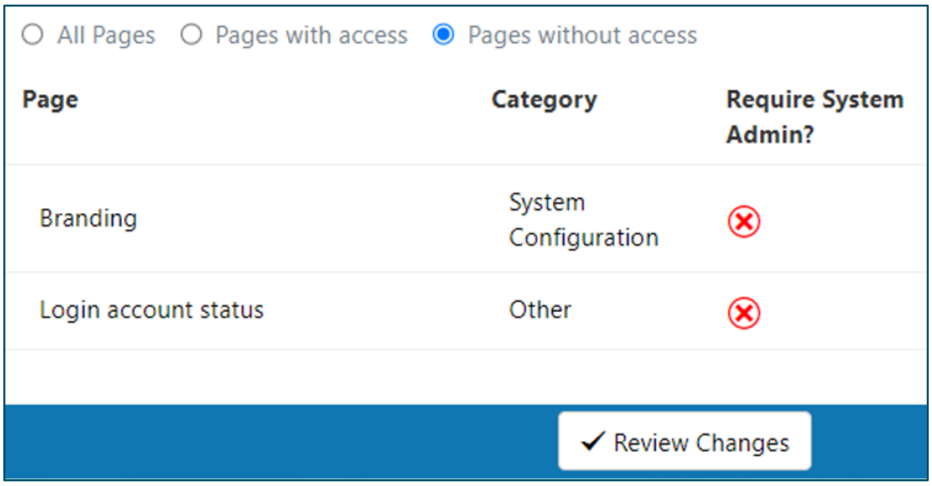
1. Enable New Pages

Within the **Role Management** area there are some new configuration pages that will need to be made accessible to the relevant user role(s).

1. Go to **System > Security > Role Management > [select User Role] > Pages**

2. You can filter on pages without access or find them in the list below:
    - Branding
    - Login account status

3. Set **Write Access** permission on these pages, then click **Review Changes and Update**



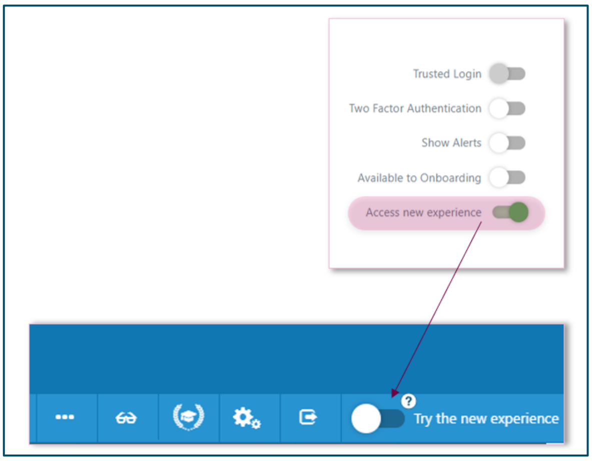
4. Before you leave Role Management you also need to give the relevant user role(s) access to the new experience toggle, covered in the next section

Note: The **Login account status** page is only available in the new experience so you will need to have this enabled to view this page.

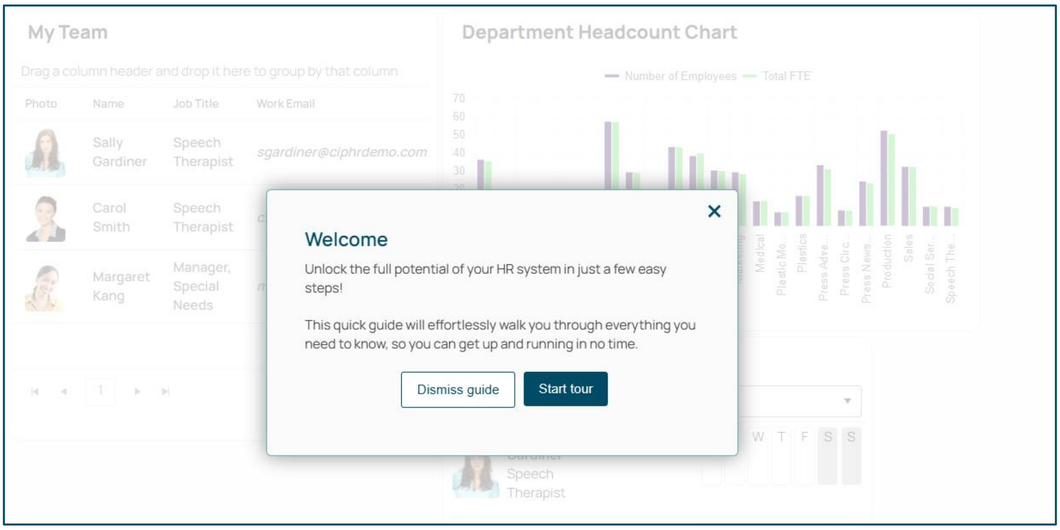
2. Enabling the New HR Experience

To enable the version switcher and new system pages:

1. Go to **System > Security > Role Management > [select User Role] > Details**
2. You'll see a new slider on the right for **Access new experience**
3. Turn on the slider, then click **Review Changes and Update**
4. Refresh your menu, and you'll see the **Try the new experience** switcher in the top-right menu



5. You're now good to go and try out the new experience
6. When you first enable it, you'll be greeted by in-app guidance for a tour around the new layout. You may need to disable your pop-up blocker initially to see this guidance

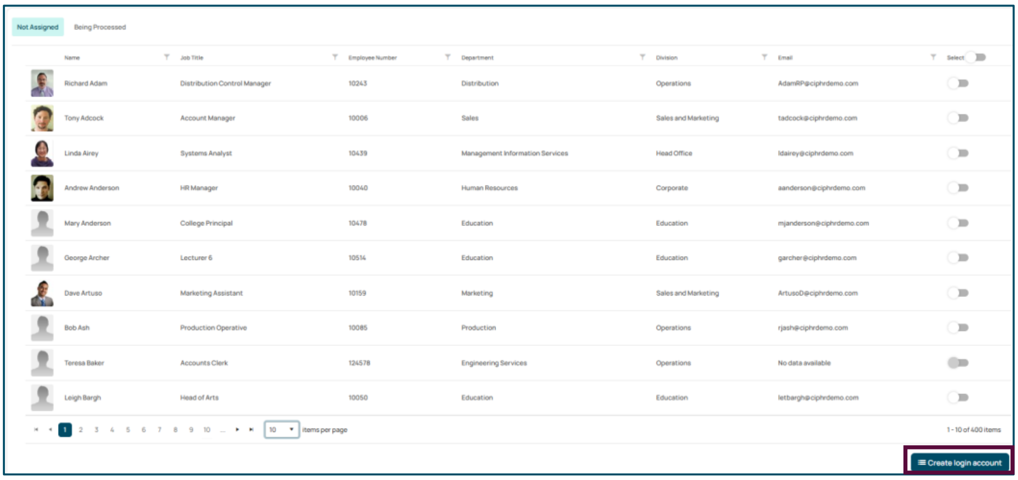


3. Check Sign-In accounts

Please check that all your active accounts have synced as expected.

> **Note:** Past leavers were *not* included in the sync so if you wish to grant access please see step 3.2.

1. Go to **Data Management > Login account status**
2. Use the subset button to set the relevant criteria and check the **Not Assigned** tab which shows users without a sign-in account



Not Assigned | Being Processed

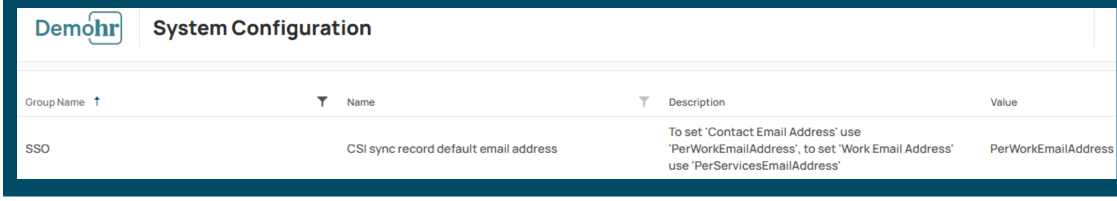
Name	Job Title	Employee Number	Department	Division	Email	Select
Richard Adam	Distribution Control Manager	10243	Distribution	Operations	AdamRP@ciphrdemo.com	
Tony Adcock	Account Manager	10006	Sales	Sales and Marketing	tadcock@ciphrdemo.com	
Linda Airey	Systems Analyst	10439	Management Information Services	Head Office	ldairey@ciphrdemo.com	
Andrew Anderson	HR Manager	10040	Human Resources	Corporate	aanderson@ciphrdemo.com	
Mary Anderson	College Principal	10478	Education	Education	mjanderson@ciphrdemo.com	
George Archer	Lecturer 6	10514	Education	Education	garcher@ciphrdemo.com	
Dave Artuso	Marketing Assistant	10159	Marketing	Sales and Marketing	ArtusoD@ciphrdemo.com	
Bob Ash	Production Operative	10085	Production	Operations	rjash@ciphrdemo.com	
Teresa Baker	Accounts Clerk	124578	Engineering Services	Operations	No data available	
Leigh Bargh	Head of Arts	10050	Education	Education	letbargh@ciphrdemo.com	

1 2 3 4 5 6 7 8 9 10 ... | 10 items per page | 1 - 10 of 400 items

Create login account

3. Where active users are listed here who should have a Sign-In account, this is likely due to an invalid email address or an account enabled/expiry date error
4. Where an email is missing this will need to be corrected in **Personal Details > Contact Details**

> **Note:** You can check which email address is the system default (contact or work) required for Sign-in accounts in System Configuration > SSO Group.

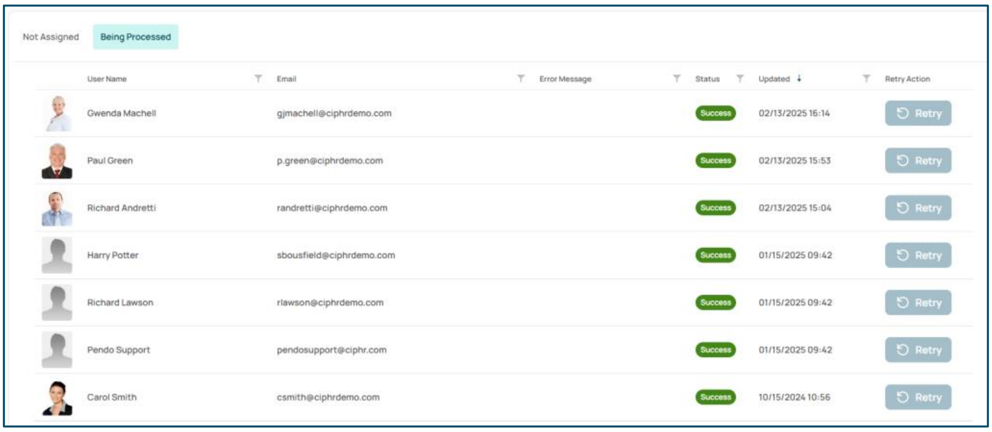


Demohr System Configuration

Group Name	Name	Description	Value
SSO	CSI sync record default email address	To set 'Contact Email Address' use 'PerWorkEmailAddress', to set 'Work Email Address' use 'PerServicesEmailAddress'	PerWorkEmailAddress

5. Select the users (select all option is available at the top) and click **Create login account**

6. The **Being Processed** tab provides the sync status to the **Sign-In** area



7. Once successful, the account will be manageable in the **Sign-In Admin** area. If the **welcome email notification** is enabled in Sign-in Admin, any users logging in with email and password will receive an activation email (not applicable to SSO users)
8. For full details on the **Sign-In Admin** area please see this guide.

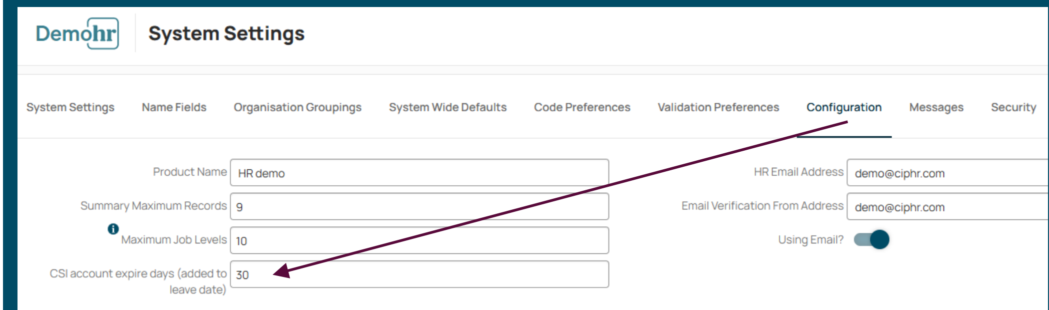
3.1 Starters

There are two ways you can create a sign-in account in HR when adding new starters. Please refer to this guide for more details.

3.2 Leavers

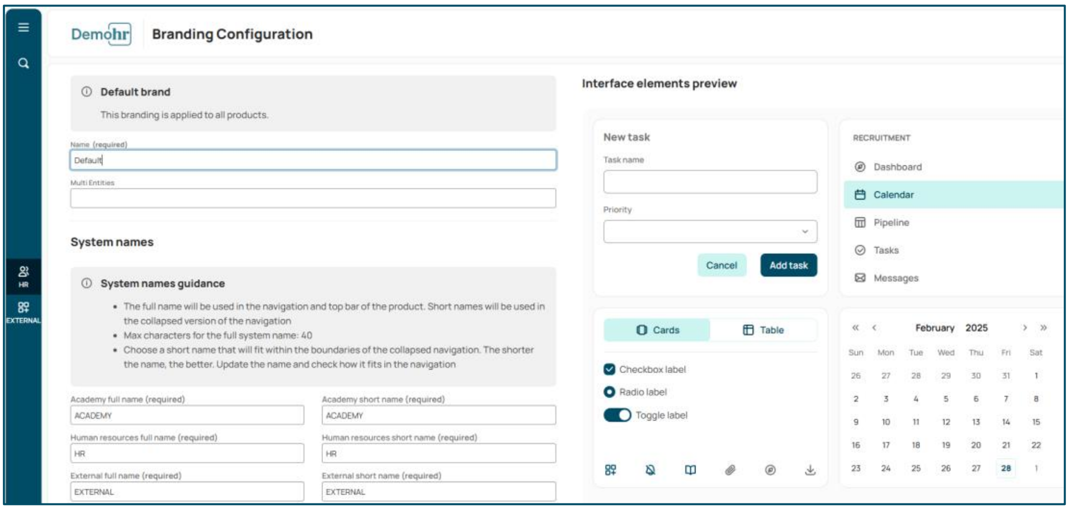
To create sign-in accounts for leavers/offboarders, follow the steps at the beginning of section 3 to find them in the **Login account status** page. Ensure leavers are included in your subset to display them in the list.

Note: If you give leavers access to your system for a limited offboarding period, you can set the number of days after leave date in **System Settings > Configuration tab**.



4. Branding

1. In the new HR experience you'll see the branding that was configured during the update preparation phase
2. If you wish to make any changes you can do this in the **Branding Configuration page** which can be accessed via:
    - **System Configuration** (different branding can be applied per Entity if using Multi Entity)
    - **Profile > Sign-in Admin** (Global admin licence required – default overall branding only)



3. For full details please see the [Branding Configuration](#) guidance

Note: Branding configuration only applies to the new HR experience so branding in the old interface will be unaffected.

5. Next steps

Starters and leavers – new process

Once you've completed the immediate tasks, it's recommended that all users involved in processing starters and leavers familiarise themselves with the new process for creating and disabling sign-in accounts.

Important! The new process will apply regardless of whether the new experience is enabled.

Please refer to this guide for more details. Guide links are also available within the in-app guidance resource centre (see next section).

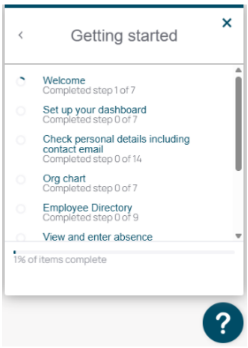
Further help

In-app guidance

For quick-reference support, please check out the in-app guidance help menu and on screen tooltips. All users in the new experience will have access to guides relevant to their user role.

It's recommended to complete the **Getting started** learning journey to familiarise yourself with how the guides work and how you can incorporate them into your onboarding process for new users.

The resource centre is growing all the time but currently the menu is structured as follows:



- **Getting started**
  All users:
  - Welcome
  - Set up your dashboard
  - View and enter absence
  - Check personal details including contact email address
  - Org Chart
  - Employee Directory

  HR, managers, assistants only:
  - View and edit subordinate records
  - Approvals (HR, managers, assistants only)
  - Manage deputy (HR, managers, assistants only)

- **General Library (all users)**
  Full A-Z of guides (relevant to user role) with search.

- **HR learning journeys (Academy licence holders)**
  In-app guides are currently being built for HR users to align with the Academy e-learning but in the meantime, this menu gives you quick link access to the Academy journeys.

- **Release Notes**
  Notes will pop up automatically after a release update but you can read them again as needed from the menu. Access will vary depending on what is included in the release and its relevance to different user roles.

- **Announcements**
  Latest news from the resource centre will be tailored to the relevant user role(s) as appropriate.

Customer care hub

For further learning and any outstanding queries please visit our customer care hub for in-depth help guides or to submit a support request.

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