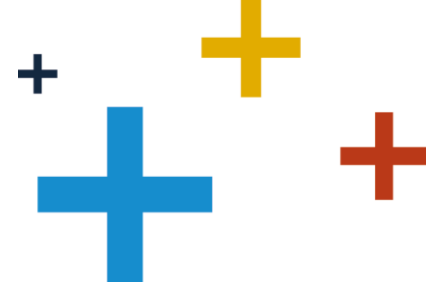


CIPHR HR 9.5 release notes – 9.5.0

NEW FEATURES	2
OPTIONAL MODULES	2
Security Passes	2
EXISTING FUNCTIONALITY CHANGES	4
Talent Management Change Manager and Retain Answers	4
Talent Management Review Type Selection	5
Holiday Adjustment Reason	6
EXISTING FUNCTIONALITY ENHANCEMENTS AND FIXES.....	7
SUPPORT	7



NEW FEATURES

OPTIONAL MODULES

Security Passes

An optional module is now available that will allow management of security passes for both staff and visitors.

Management of the passes are managed independently from each other through two new pages:

- Staff Security Passes - for managing staff passes
- Visitor Security Passes - for managing visitor passes

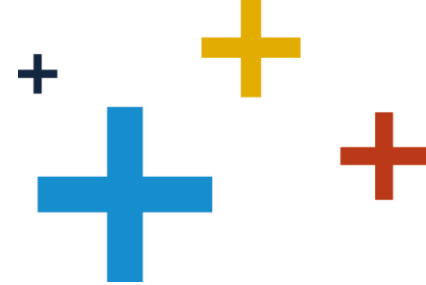
The default location for the new pages is under the People Admin menu. Access to these pages will need to be granted to the relevant user roles via **System> Security> Role Management> [select user role]> Pages**. This means you can grant access to a specific page per user role if required: eg you have a user role that solely deals with visitor passes so you can grant them access to this page only.

Each pass type will require a template .html file to be able to print the passes which is set up by the CIPHR Services Team.

Staff passes can be created by using the advanced search to look for the record, to prepopulate the details. Clicking save and print will produce a pop up window to print a pass.

Further Information fields can be added to the staff page in the usual way via **System> System Administration> Further Information Configuration> Staff Security Passes**. They will appear at the bottom of the page rather than on a separate tab as shown below. For more information on this area please refer to the relevant information sheets on CIPHR Academy.

The screenshot displays the 'Staff Security Passes' management interface for a user named Richard Adam. The interface includes a header with the user's name and role, and a search bar. The main content area is divided into 'Personal Details' and 'Pass Details' sections. The 'Personal Details' section contains fields for Surname, Known As, Name, Title, Job Title, Birth Date, Start Date, Date Left, Organisational Name, Department, and Division. The 'Pass Details' section includes fields for Issue Date, Expiry Date, and Notes. A 'Further Information Field' is highlighted with a red box. A 'Save and print' button is located at the bottom of the form. An inset window shows the printed pass template, which includes the CIPHR logo, the user's name and photo, and a QR code.



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CIPHR HR release notes 9.5

Visitor passes can be created by entering the relevant details, to be able to save and print.

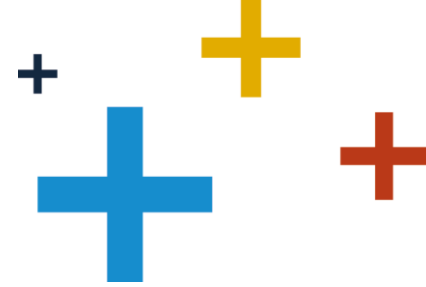
Enter the visitor's personal details and click update.

Once a visitor has been added to the system, click into the Pass History tab to insert a new pass and record the relevant details.

Both staff and visitor pages contain a history tab to view details of previous passes issued.

Pass Number	Issue Date	Expiry Date
A28001	01/May/1990	20/Apr/2022
A28003	01/May/1990	

For more information on how to add this to your system please contact your account/customer success manager.

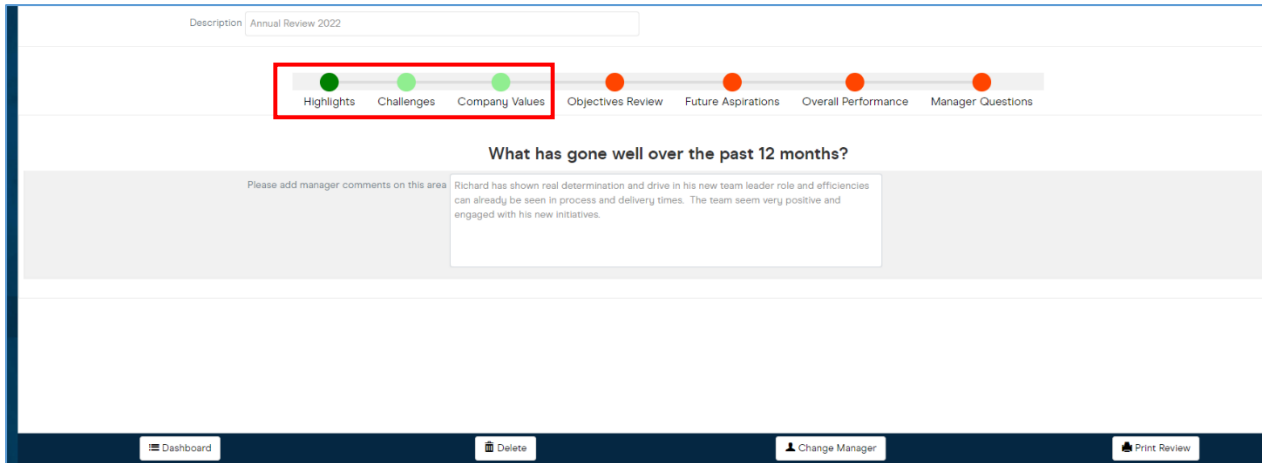


EXISTING FUNCTIONALITY CHANGES

Talent Management Change Manager and Retain Answers

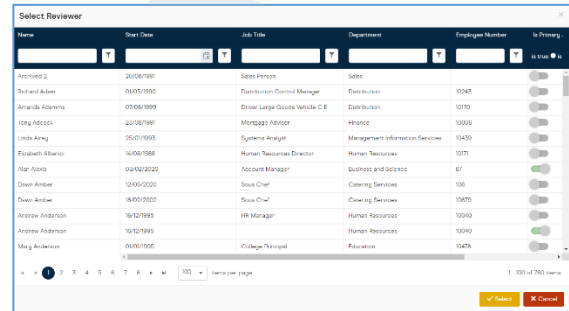
It is now possible for a system administrator (licence required) to choose not to delete manager answers when changing the manager in a review form that has not been signed off.

The example below shows a partially completed manager form with submitted sections in green.



System administrators will see a change manager button and can select the new manager from the list.

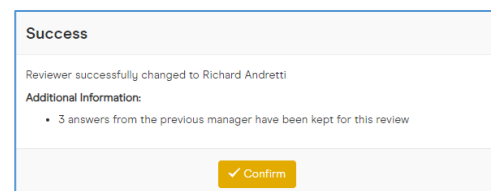
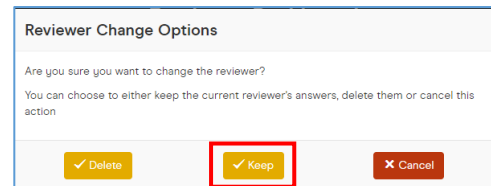
NOTE: The new manager must have subordinate access to the employee through the hierarchy, and appropriate user role permissions to be able to see the review.

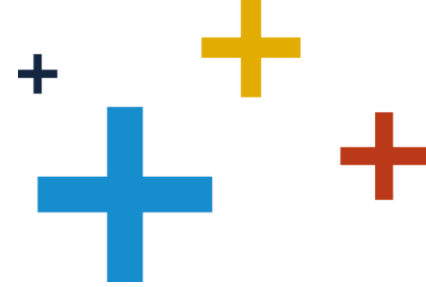


Once the new manager has been selected, there is now an additional option to keep the previous manager comments.

If choosing to **keep** the comments, the message will confirm a summary of what has been retained.

NOTE: only submitted (shared) manager answers will be retained. If the previous manager added comments in draft mode (unsubmitted) that have not been shared, these will be lost.





When the new manager views the form, the previous manager comments will be present in draft (unsubmitted) mode, but as they were previously submitted they will still be visible to other users.

In this example the first three sections are no longer green as the new manager needs to check and submit.

The new manager can edit the original comments and add their own as necessary. If keeping the original comments they may wish to attribute them to the previous manager as illustrated below.

Unsubmitted sections are saved in draft mode but will not be visible to the reviewee until submitted

Description Annual Review 2022

Highlights Challenges Company Values Objectives Review Future Aspirations Overall Performance Manager Questions

What has gone well over the past 12 months?

Please add manager comments on this area

P Green comment: Richard has shown real determination and drive in his new team leader role and efficiencies can already be seen in process and delivery times. The team seem very positive and engaged with his new initiatives.

RA: agree with above comments, since taking over the team I can already see the positive effect Richard has on the team and overall output of the department.

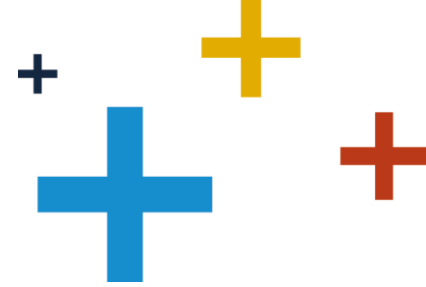
Dashboard Submit Section Delete Print Review Employee Answers

Talent Management Review Type Selection

The following Review Types have now been removed from the insert review page in the Employee Dashboard as they are specifically designed to be created via their associated pages:

1. 'Performance Review' – this is inserted if choosing to add review ratings as part of a Pay Review
2. '9 box quick entry' (full module only) – this is inserted via the 9 Box Quick Entry page

For more information on these specialist areas please refer to the relevant information sheets on CIPHR Academy.



Holiday Adjustment Reason

Users can now specify a reason for a manual holiday adjustment in the Absence Summary Totals page. Previously a default "Individual Change" value was recorded automatically in the database.

This page's default location is in **People Admin > Time Management > Absence Summary Totals**.

The screenshot shows the 'Absence Summary Totals' page for Tony Adcock. The page is divided into several sections:

- Left Column:** Fields for Holiday Entitlement (Standard), Holiday Year (Standard), Holiday Year Start (01/Jan/2022), Holiday Year End (31/Dec/2022), Holiday Entitlement (30.00), Holiday BF (5.00), Manual Holiday Adjustment (2.00), Holiday Taken (0), Holiday Left (37.00), and Sickpay Scheme (Normal).
- Right Column:** Fields for Absence Year (Rolling year), Year Start (18/May/2021), Year End (17/May/2022), Days Available (281), Absence Days (28.00, 1073%), Sick Days (28.00, 1073%), Unauthorised Days (0, 0.00%), Late Minutes (0), and Late Occasions (0).
- Bottom Section:** 'Last rolling 12 months' section with Bradford Factor (28.00) and Episodes (1).

A blue callout box highlights the 'Change Holiday Entitlement' button and the 'Manual Adjustment Reason' field in the 'Last rolling 12 months' section, which is populated with 'Extra 1 day bonus'.

The new field will be populated with the last recorded reason for change and can be amended as appropriate.

Other useful pages in the **People Admin > Time Management** area are:

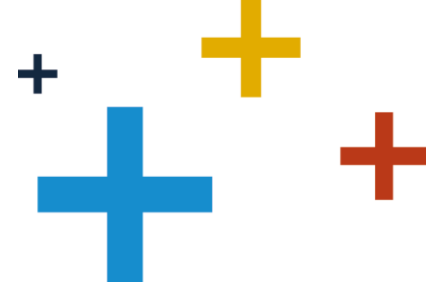
- **Holiday Adjustment History** – to view an audit of changes
- **Bulk Holiday Adjustment** – to manually adjust holidays in bulk using subset selection

The 'Holiday Entitlement' modal form shows the following fields:

- Holiday Entitlement * (Standard)
- Holiday BF (5.00)
- Holiday Entitlement (30.00)
- Manual Holiday Adjustment (1.00)
- Manual Adjustment Reason (Extra 1 day bonus)
- Holiday Year * (Standard)
- Holiday Year Start * (01/Jan/2022)
- Holiday Year End * (31/Dec/2022)

Buttons for 'Update' and 'Cancel' are visible at the bottom.

For more information on this area please refer to the relevant information sheets on CIPHR Academy.



EXISTING FUNCTIONALITY ENHANCEMENTS AND FIXES

This release includes general site performance and page improvements not linked to specific tickets.

The following pages had targeted work completed to improve load times:

- Talent Management
 - Talent Management Review creation
 - 9-box Quick Entry grid
 - Succession Planning add successor
 - Training Details venue selection
 - Course Bank redirect to employee training records
 - Event Finder event details
- Manager Verifications grid
- Absence Planner view change
- Timesheets creation

SUPPORT

For more details on functionality please refer to the information pages available on CIPHR Academy.