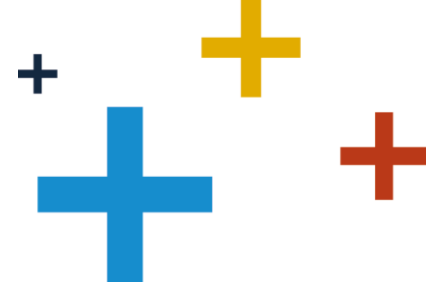


CIPHR HR 9.4 release notes – 9.4.5

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NEW FEATURES

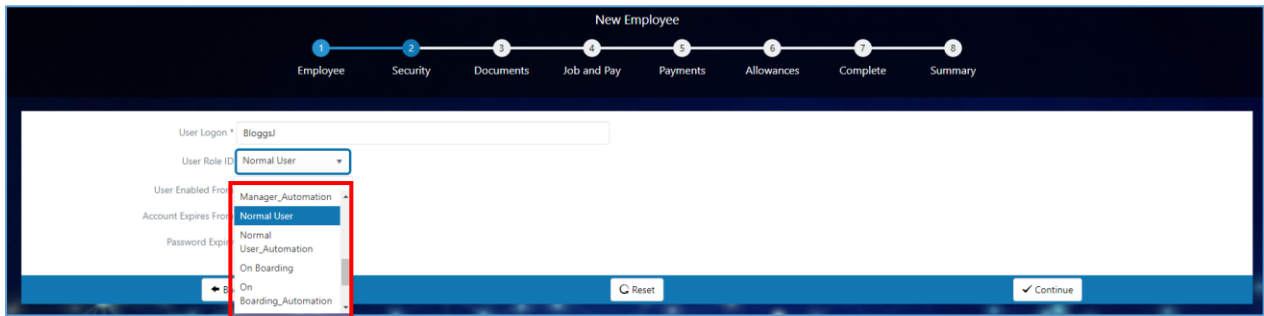
User Role Management

A **User Role** determines what employees in that role have access to see and do within CIPHR.

It is now possible to control which user role profiles a user has access to via a new **Roles** menu in Role Management Actions.

This can give system supervisors greater control in areas such as:

New Employee Wizard: At the **Security** stage of the workflow, the list of available User Role IDs can be restricted, Eg to hide the system supervisor roles from an HR Admin user.



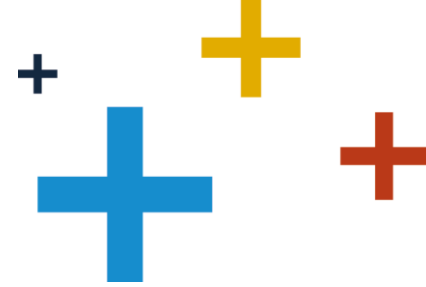
HR User Role access in specific Entity/Location

If local HR teams manage a specific area in the company, you can now control their user role access so they can only manage user roles in their area.

Eg the Education HR User can only see roles below within Education, and other user roles are hidden.

Role Management				
Description ↑	Type	Two Factor Authentication	Trust	
Education Employee	Normal User	⊗	⊗	⊗
Education HR User	HR User	⊗	⊗	⊗
Education Manager	Manager	⊗	⊗	⊗
Education Onboarder	Normal User	⊗	⊗	⊗

Note: this functionality does not apply to individual employee record visibility which is managed by **Record Group Security**. For more information on Record Groups please refer to the relevant information sheets on CIPHR Academy.

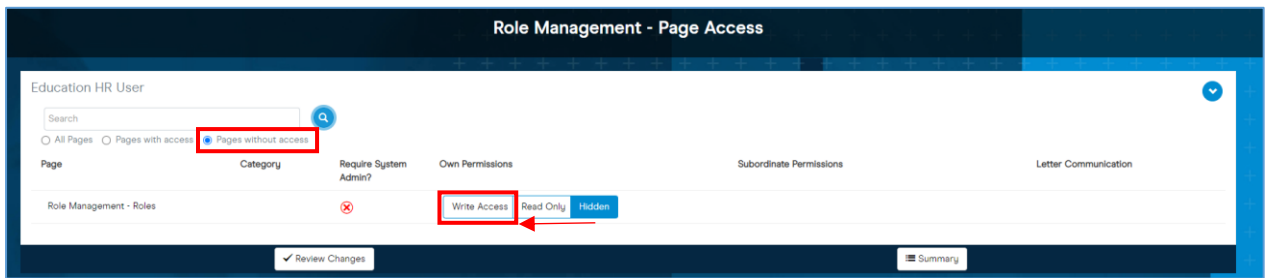


Actions

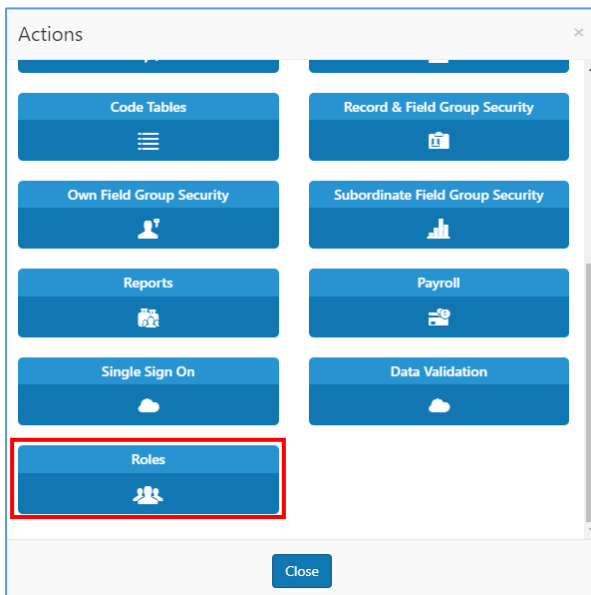
The system supervisor with full access should manage the configuration of the new Roles menu. It is important to retain at least one user role with no restrictions to be able to maintain overall control.

Firstly, to see the new option within **System> Security> Role Management> [select user role]> Actions> Pages**, grant **Write Access** to the new **Role Management - Roles** Page.

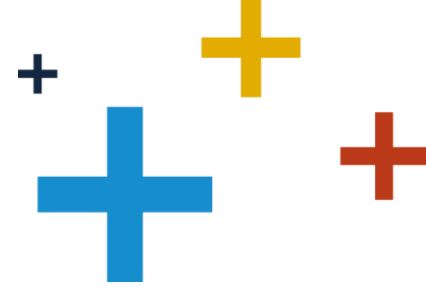
Tip: a quick way to check for new pages is to filter on pages without access.



Once page access is granted, a new **Roles** button will appear at the bottom of the **Actions** menu.



Note: A user cannot amend their own accessibility in this menu so the options will be read-only if looking at their own user role.



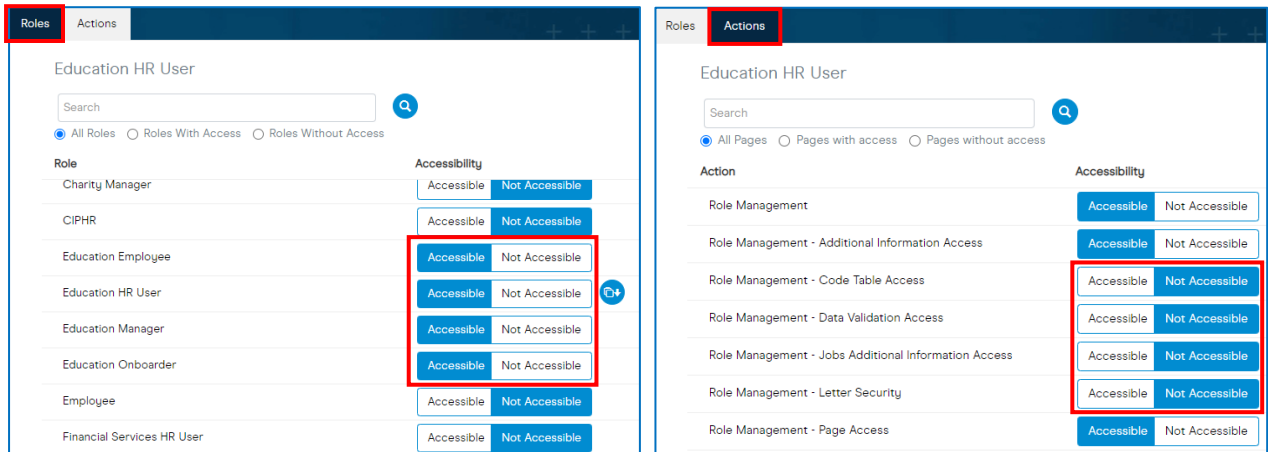
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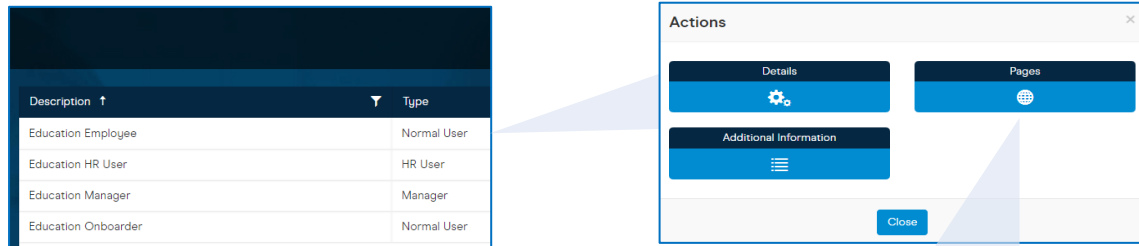
The **Roles** menu shows which other user roles the selected user role has access to on the **Roles** Tab, and the Role Management Actions they can see on the second **Actions** Tab.

Choosing the **Not Accessible** option means the user role will not be able to see those user roles, or actions.

Example: Education HR User can only see user roles within Education, and some role management actions have been restricted:

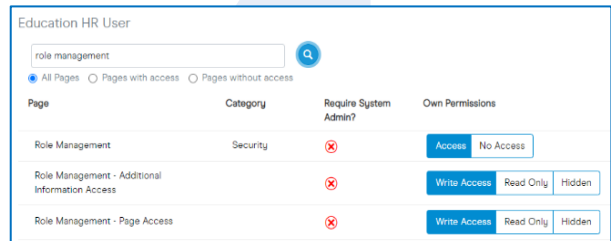


The steps taken above will restrict the Education HR User access as shown below:

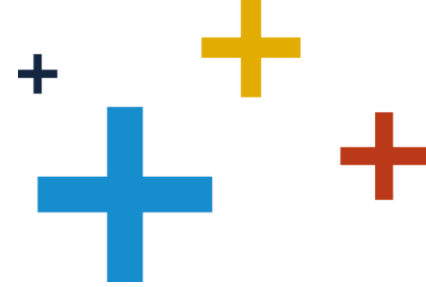


They can only see the Education user roles, and when clicking into a user role, the Actions are limited.

They have page access, but the Role Management pages that have been made not accessible, are not visible in the Page list.



New User roles created by a restricted user role will automatically be accessible to the role that created it. The creator will only be able to grant the new role access to roles within their access rights.



Note: For users adding records via the **New Employee Wizard**, they will need write access to the **Role Management – User Access** page to be able to select accessible user roles at the Security stage.

Without access to this page, they will be able to access the default user role only and see the message below (default user must be set in **System Settings**). For more information on System Settings please refer to the relevant information sheets on CIPHR Academy.

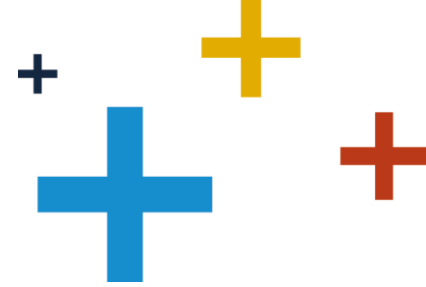
The screenshot shows the 'New Employee' wizard at the 'Security' stage. A red box highlights the 'User Role ID' dropdown menu, which displays the message: "You do not have permission to assign a role other than the default one". Other fields include 'User Logon *' (BloggsJ), 'User Enabled From' (01/Mar/2022), 'Account Expires From', and 'Password Expiry'. Navigation buttons for 'Back', 'Reset', and 'Continue' are visible at the bottom.

Personal Details Dual Nationality Recording

It is now possible to record dual nationality as a new field **'Nationality 2'** has been added to the **Equal Opportunities Tab** within the **Personal Details Page**.

The screenshot shows the 'Personal Details' page for Alan Alexis (Primary), Account Manager. The 'Equal opportunities' tab is selected. A red box highlights the 'Nationality 2' dropdown menu. Other fields include 'Sex' (Male), 'Marital Status' (Married), 'Birth Date' (05/Mar/1939), 'Ethnic Origin' (White English, Welsh, Scottish, N Irish or British), 'Do you have a physical or mental health condition, illness, impairment or disability?', 'Disability Notes', 'Gender Identity', 'Gender Reassignment', 'Religion Or Belief', and 'Sexual Orientation'. Navigation buttons for 'Update', 'Communication', and 'Reset' are visible at the bottom.

This new field can be amended in the usual way through the Tables and Fields menu and Field Group Security, and is available within reporting and subsets. Please refer to the relevant information sheets on CIPHR Academy for more details.



Talent Management

A number of enhancements to this area are detailed below:

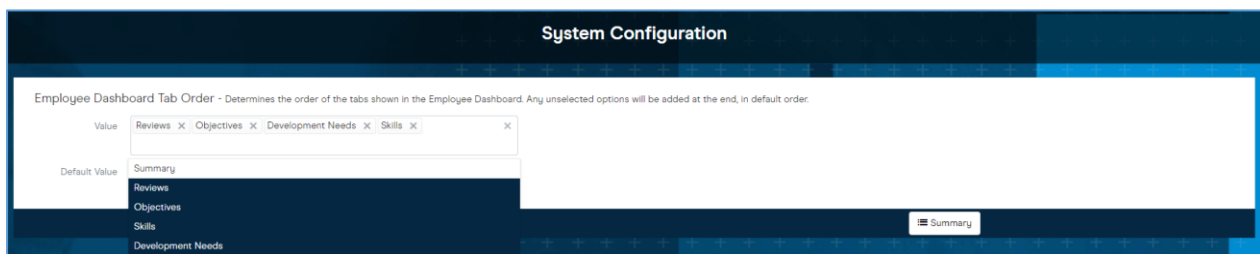
Employee Dashboard

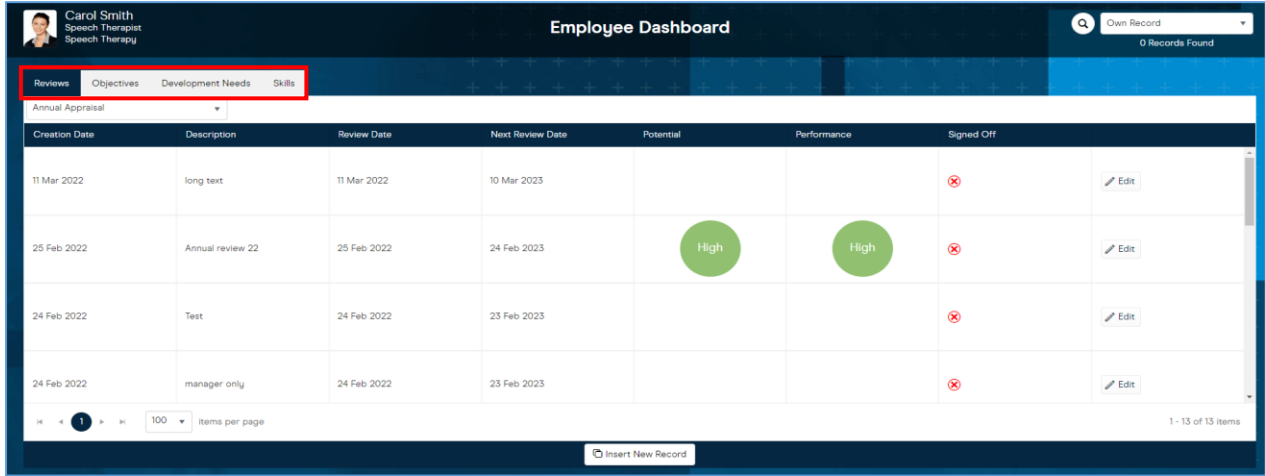
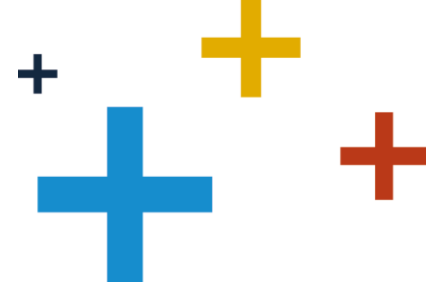
The Employee Dashboard Summary can now be configured to hide the Tab, or individual areas and sections within it.

There are a number of system configuration keys which enable you to customise your dashboard. Options can be viewed via **System > System Configuration > System Configuration > Talent Management Group**.

Group Name	Name	Description	Value
Talent Management	Employee Dashboard Tab Order	Determines the order of the tabs shown in the Employee Dashboard. Any unselected options will be added at the end, in default order.	Summary,Reviews,Objectives,Skills,Development Needs
Talent Management	Employee Dashboard Summary Hide Skills	Determines whether the Dashboard Summary tab's Skills should be hidden for all users	false
Talent Management	Employee Dashboard Summary Hide Since Last Review	Determines whether the Dashboard Summary tab's Since Last Review section should be hidden for all users	false
Talent Management	Employee Dashboard Summary Hide Sections History	Determines whether the Dashboard Summary tab's Sections History section should be hidden for all users	false
Talent Management	Employee Dashboard Summary Hide Reward Points	Determines whether the Dashboard Summary tab's Reward Points should be hidden for all users	false
Talent Management	Employee Dashboard Summary Hide Objectives	Determines whether the Dashboard Summary tab's Objectives should be hidden for all users	false
Talent Management	Employee Dashboard Summary Hide Latest Sections	Determines whether the Dashboard Summary tab's Latest Sections section should be hidden for all users	false

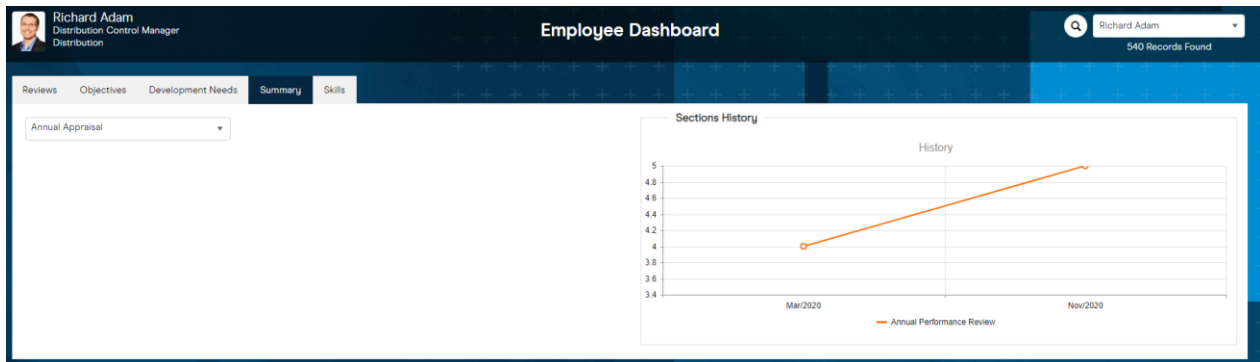
You can now choose the order of tabs within the **Employee Dashboard** by removing the Values then selecting them in the order you wish them to appear.





NOTE: Objectives, Skills and Development Needs Tab Visibility is controlled by **System> Security> Role Management> [select user role]> Pages**. Eg if a manager does not have access to the Skills and Qualifications page, the Dashboard Tab will be hidden from them.

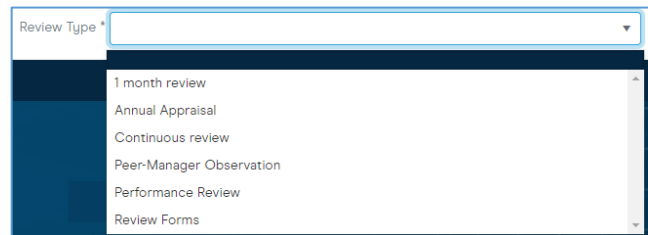
An example below shows elements of the Dashboard Summary being hidden to only show Sections History. Data here is from rated (1-5) questions within a review form, where 'include in dashboard' is enabled.

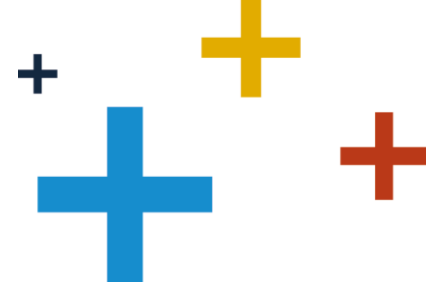


For more information on user role page access and review form configuration please refer to the relevant information sheets on CIPHR Academy.

Review Type (A-Z) dropdown menus

Review type dropdowns in the Employee Dashboard when selecting and inserting reviews will now show alphabetically.





Print Review

The option to **Print Review** is now available as soon as the review is inserted so can be printed at any stage.

The screenshot shows a review form interface. At the top, there is a breadcrumb trail: 'Description | Appraisal'. Below this is a progress bar with six segments: 'Highlights', 'Challenges', 'Company Values', 'Objectives Summary', 'Future Aspirations', and 'Overall Performance'. The main content area is titled 'What has gone well over the past 12 months?' and contains two text input fields: 'Please list the main highlights' and 'Please provide supporting information'. At the bottom of the form, there is a dark blue navigation bar with several buttons: 'Dashboard', 'Submit Section', 'Delete', 'Print Review' (highlighted with a red box), and 'Manager Answers'.

Review Form Timeout

Reviews will no longer time out whilst a user is actively working on a review form. **Note:** inactivity on the page will result in the normal time out process.

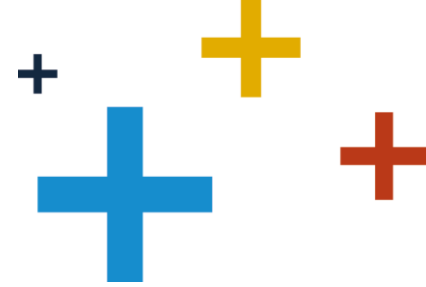
Review Date Amendments (System Administrator Licence Required)

Review Date and Next Review Date fields can now be amended after the review has been created, by a System Administrator (licence required).

To edit dates, click on the relevant review within the **Employee Dashboard > Reviews**, and click the **Edit** button on the right hand side to make the fields editable. Amend the dates then click **Update** to save or **Cancel** to abandon the change(s).

The screenshot shows the 'Employee Dashboard' for Richard Adam, a Distribution Control Manager. The 'Reviews' tab is active, showing a table of reviews. The table has columns for 'Creation Date', 'Description', 'Review Date', 'Next Review Date', 'Potential', 'Performance', 'Signed Off', and 'Actions'. Two reviews are visible: one from 11 Mar 2022 and another from 19 Nov 2020. The 11 Mar 2022 review has 'Update' and 'Cancel' buttons, while the 19 Nov 2020 review has an 'Edit' button.

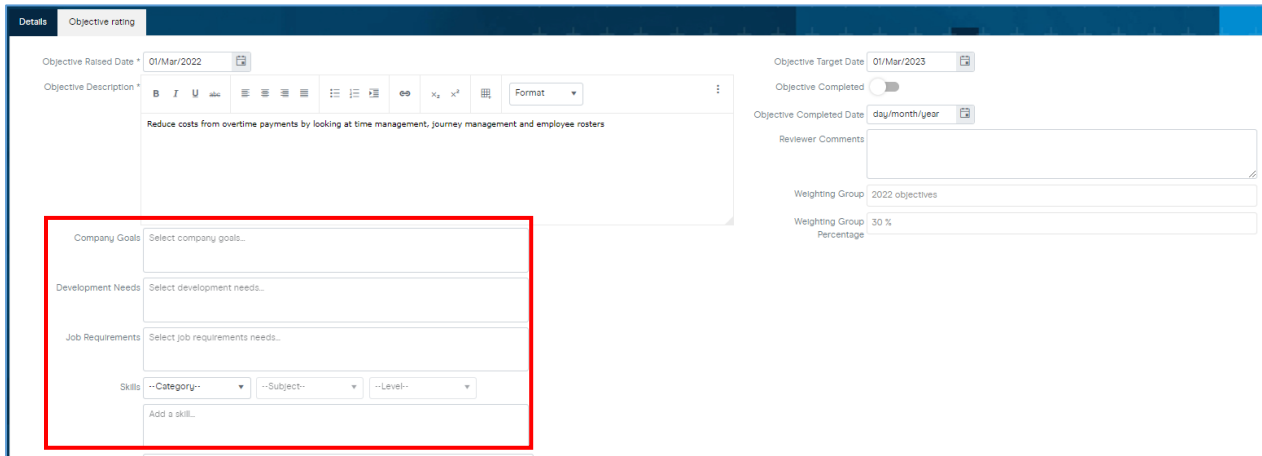
Creation Date	Description	Review Date	Next Review Date	Potential	Performance	Signed Off	Actions
11 Mar 2022	appraisal	15/Mar/2022	10/Mar/2023				Update Cancel
19 Nov 2020	Review 2021		18 Nov 2021				Edit



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Objectives Field Group Security

There are a number of linked fields within the Talent Management Objectives Page/Objectives Tab in Employee Dashboard which can be hidden via System Configuration.



It is now possible to configure these linked fields listed below (alongside the standard Objectives page fields) through field group security:

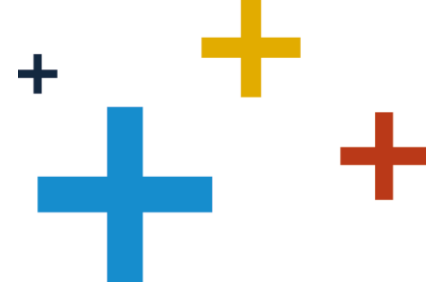
- Company Goals
- Development Needs
- Job Requirements
- Skills multi-select dropdowns

This could be useful in scenarios such as:

- Making certain fields read-only for the employee/manager
- Hiding Objectives information from a particular record group: eg preventing the HR team from viewing each other’s objectives: see illustration below - Summary and Details view show basic fields only, and restrict any potentially sensitive information such as objectives description and comments.

Objective Raised Date	Objective Target Date	Objective Completed Date
01/Mar/2022	31/Mar/2023	
01/Mar/2022	31/Mar/2023	
01/Mar/2022	31/Mar/2023	





The linked fields appear under their respective Review Objective tables when applying field security via **System> Security> Manage Field Groups and Fields**.

- Company Goals → Review Objectives Company Goals
- Development Needs → Review Objectives Development Needs
- Job Requirements → Review Objectives Job Requirements
- Skills → Review Objectives Skills

Note: the standard fields on this page are in the Reviews Objectives Table

The changes to the linked fields affects where the translation for their labels comes from if you wish to amend the names; they will now come from the "*LanguageField*" table. These can be updated through the **Language Export/Import** functionality. For more information on this area please refer to the relevant information sheets on CIPHR Academy.

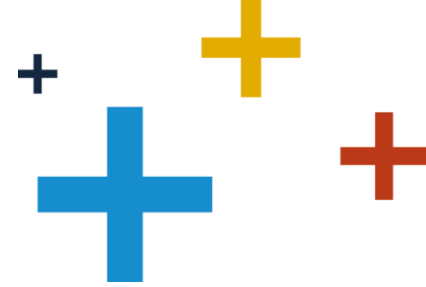
Note: if hiding objective fields within this area, the field security does not currently apply to the following areas:

- **Personal Development Plan** download page
- Objectives included in **Reviews** (full Talent Management module only): Objective Description will be visible in a Talent Management review that includes objectives, even if the field is hidden on the main objectives page.

Objectives in Reviews (full Talent Management module only)

Review Type configuration has been improved to prevent duplication of objective sections.

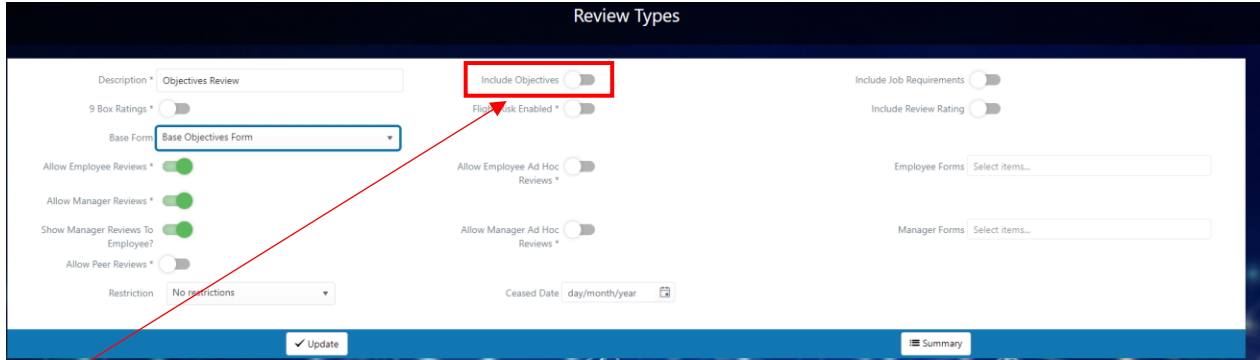
If an objectives section is included in a Base Form this overrides other forms and therefore you will not be able to select an Employee/Manager review that includes an objective section.



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If employee/manager forms are attached, that include an objectives section (as above), and you then select a Base Form with objectives, it will clear the employee/manager forms selection.



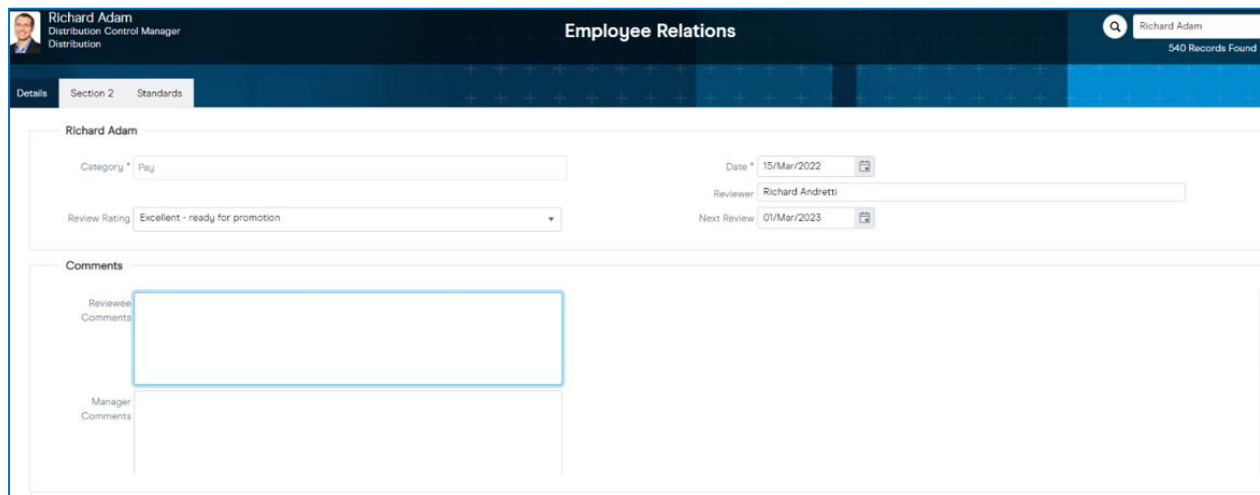
Note: the 'Include Objectives' toggle on the review type will only apply if none of the attached review forms contain an Objectives section.

For more information on **review type/form configuration** please refer to the relevant information sheets on CIPHR Academy.

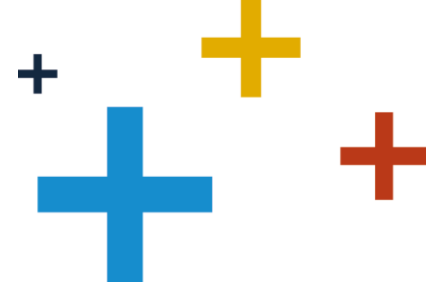
Employee Relations/Reviews Page Verification

The verification process has been improved on this page so users can now complete all fields on the page (subject to their access level) and save before any applicable verification is triggered.

If you wish to amend the verification settings on this page, this can be updated via **System > Security > Verification Settings**.

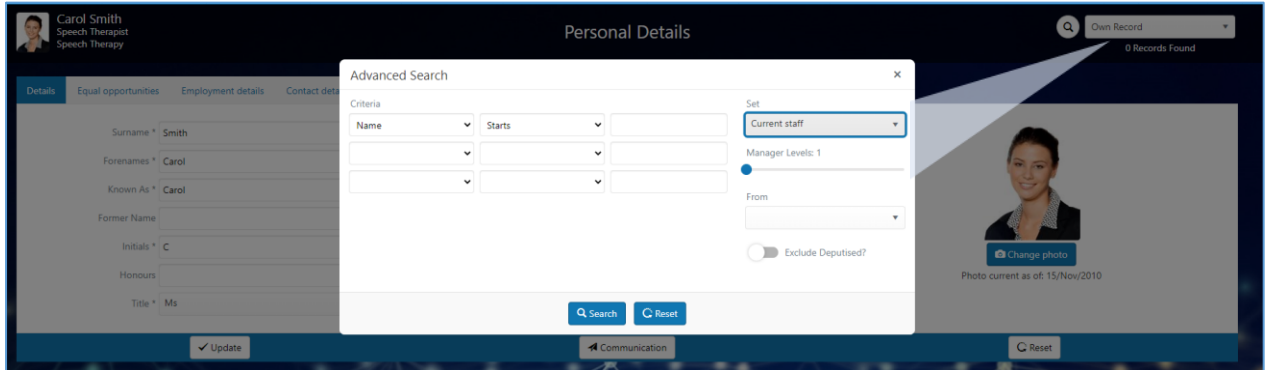


For more information on **Employee Relations** and **Verification Settings** please refer to the relevant information sheets on CIPHR Academy.

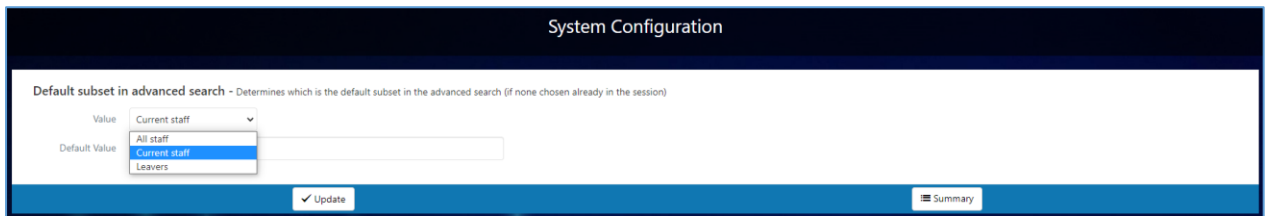


Ability to amend default subset in Advanced Search

When using the advanced employee search, the default subset upon first use is set to Current staff.



This can now be amended to show all staff or leavers by default, via **System> System Configuration> System Configuration> Default subset in advanced search (within General group)**.

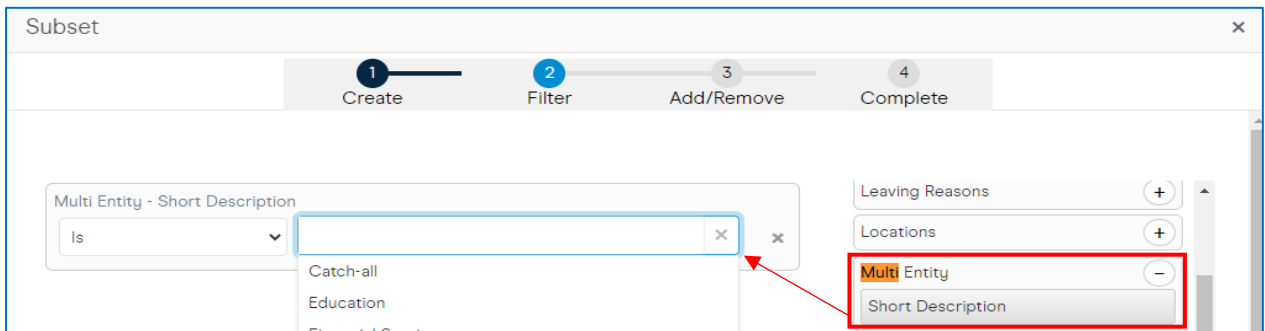


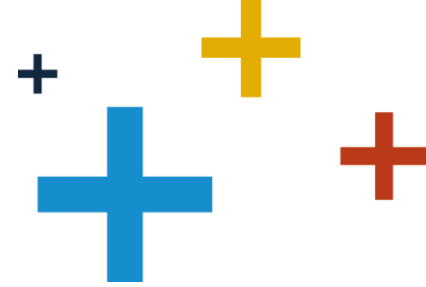
OPTIONAL MODULES

Multi Entity Name Filter in Subset

Customers using Multi Entity now have the ability to filter by entity in the subset menu.

When creating a Subset, at the second stage – Filter, there is now an option to select Multi Entity Short Description and filter in the usual way to aid searching and reporting.





EXISTING FUNCTIONALITY ENHANCEMENTS AND FIXES

Associated Ticket	Area
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	Job and Pay
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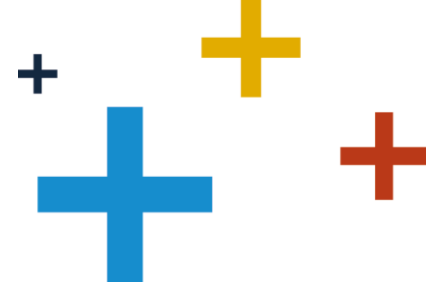
- | | |
|-----------|--|
| PROD-138 | - Job and pay: improvement to pay frequency change warning message |
| PROD-383 | - Jobs: Previous Job Occupants now displays leaver records |
| PROD-2101 | - Jobs: Current job occupants no longer shows previous job occupants |
| PROD-1096 | - Job Requirements: Improved search performance to accommodate larger numbers |
| PROD-558 | - Spine Increment: 'Job Title' column now displays correctly |
| PROD-751 | - Job and Pay: Calculate Term Time Pay fields now show correctly |
| PROD-1723 | - Payments: Manually amending an Hourly Rate now saves the payment amount correctly |
| PROD-2358 | - Multi Entity: Job and Pay recalculating correctly where Grade is read-only |
| PROD-2377 | - Job Occupants: second page now loads correctly |
| PROD-404 | - Terms and Conditions: Normal Weeks can now include further decimal places to match other system settings |

	Talent and Development
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- | | |
|-----------|--|
| PROD-186 | - Code Tables: Tutors Employee Flag now enables |
| PROD-582 | - Code Tables: Review Ratings order now displays correctly |
| N/A | - Training Event: Delegates page now includes the option to remove the mentor |
| PROD-784 | - Personal Development Plan: - Download now displays correct objectives formatting |
| PROD-1595 | - Training Details: Further Information fields can now be hidden with field group security (such as training cost) |
| PROD-2532 | - Objectives: can now be deleted |

	Letters
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- | | |
|----------|--|
| PROD-947 | - Email body now contains return character formatting when sending letters |
|----------|--|



Associated Ticket

Area

Documents

PROD-2402 - Personal Documents: Documents can now be deleted

Verifications

PROD-955 - Verifications: Email links now direct the user to the verification

PROD-1530 - Multiple Verifications can now be approved in bulk when grouped by Name column

PROD-2172 - Verifications: - Level 1 filter now displays correctly

Reports

PROD-595 - Report Designer: Improvement to prevent erroring when removing linked job fields from a Personal Details master table report

General

PROD-512 - Mobile View: Absence totals now round by two decimal places

PROD-661 - New Employee Wizard: Users can now assign user roles without access to Role Management – Pages

PROD-939 - Welcome Message: new messages will now pop up regardless of whether previous message was suppressed

PROD-2289 - Page redirection links now go to the specific page when logging in through Single Sign On

SUPPORT

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