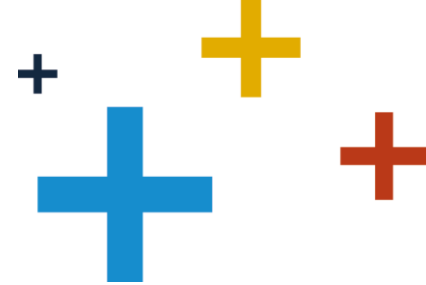


CIPHR HR 9.4 release notes – 9.4.7

NEW FEATURES	2
Talent Management Reviews now available in Bulk Change Wizard	2
Talent Management Review Form improved messaging for draft mode	3
Disability Monitoring Reporting	5
API Configuration Page	6
EXISTING FUNCTIONALITY CHANGES	8
OPTIONAL MODULES.....	8
Paylink Pay Data Output Reports	8
EXISTING FUNCTIONALITY ENHANCEMENTS AND FIXES.....	9
Talent and Development	9
Letters	9
Verifications	9
Absence	9
Reports	10
General	10
OPTIONAL MODULES.....	10
Paylink	10
Safeguarding.....	10
Candidate Importer	10
Case Management.....	11
Live Chat	11
SUPPORT	11



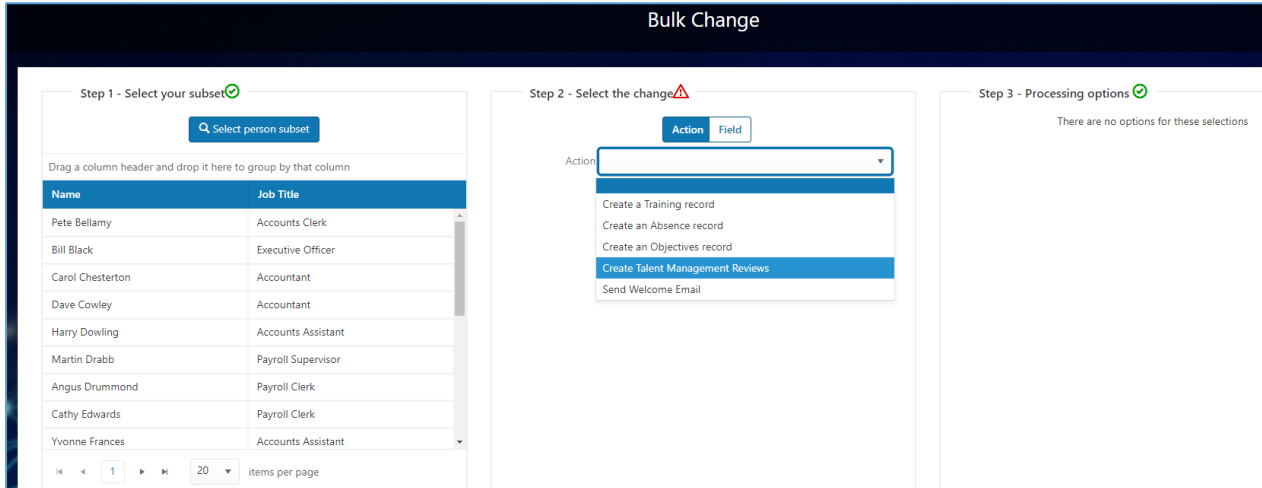
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CIPHR HR release notes 9.4

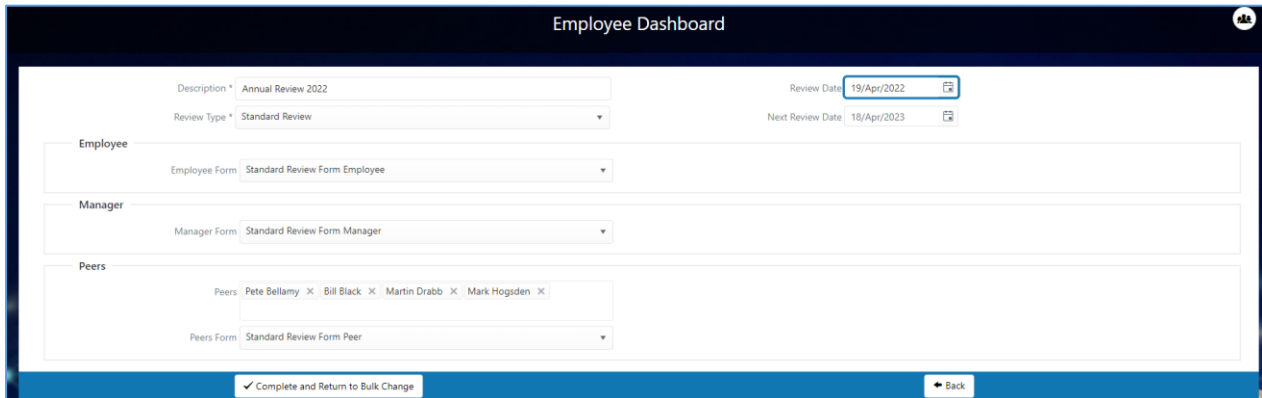
NEW FEATURES

Talent Management Reviews now available in Bulk Change Wizard

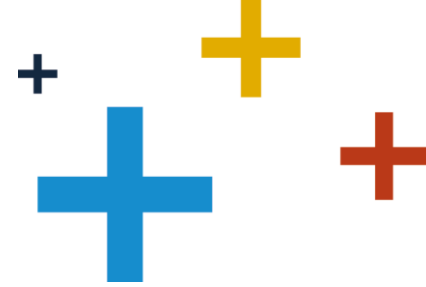
Create Talent Management Reviews is a new Action in the Bulk Change Wizard. This can be accessed via **People Admin> Tasks> Bulk Change**.



This is useful to insert the same review type for a subset of people in one go. Once inserted the review will appear in the individual’s Employee Dashboard ready to complete.



When selecting **peers**, all peers for the subset will be available but where an employee in the subset is also a peer for others, it will exclude them as a peer from their own review.



Step 2 - Select the change ✔

Action
Field

Action Create Talent Management Reviews ▼

"Annual Review 2022" reviews will be created for the selected subset starting from 19/04/2022

TIP: You can also bulk insert **objectives** via this method, such as the same corporate/team goal.

For more information on **Objectives** or **Bulk Change** please refer to the relevant information sheets on CIPHR Academy.

Talent Management Review Form improved messaging for draft mode

Within **Talent Management > Employee Dashboard > Reviews**, when an employee is completing their review form, messaging has been improved to show that information is saved in draft mode without submitting a section.

Jo Duffield
Warehouse Supervisor
Distribution

Employee Dashboard

Unsubmitted sections are saved in draft mode but will not be visible to your manager until submitted.

Description: Appraisal 2022

● Highlights
 ● Challenges
 ● Company Values
 ● Objectives Summary
 ● Future Aspirations
 ● Overall Performance

What challenges have you faced in the past 12 months?

Please list any areas that could have gone better: Absence in the team stretched our resources which has extended some deadlines.

Please provide supporting information: Draft comments
Had to cover payroll processing so Values project delayed as couldn't attend meetings
Training packs behind

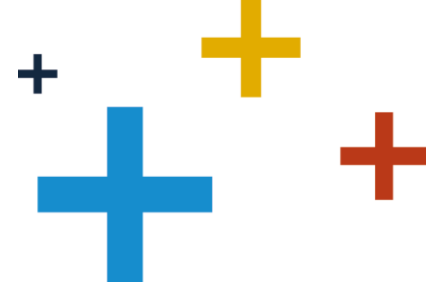
When a section is submitted the workflow circle turns green and the manager will be able to view the information in the employee form as read-only.

● Highlights
 ● Challenges
 ● Company Values
 ● Objectives Summary
 ● Future Aspirations
 ● Overall Performance

What has gone well over the past 12 months?

Please list the main highlights: Achieving sales target within the first quarter. Promotion to lead the team in June.

Please provide supporting information: Winning two new major contracts boosted sales over the full year by 15%. I am very proud of what my team have achieved and both contracts are running well, along with smaller wins.



If detail is added without submission it is saved in draft mode, so only the employee can see it, and the answers will not be visible to the manager or any HR user as shown below.

The same visibility applies to the **Print Review** button, so draft (unsubmitted) comments can be output to PDF but will only be visible to the author.

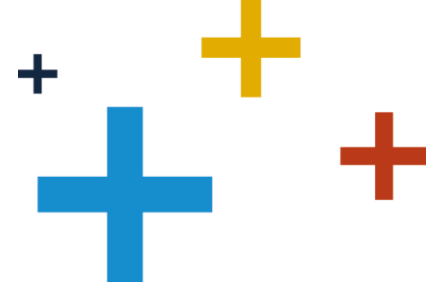
NOTE: submitted sections can still be edited and resubmitted by the reviewer, as many times as needed, as long as the form has not been signed off.

The option to **Sign Off** appears when the last section is submitted. Clicking **Continue** allows you to continue editing as required.

Once the form is signed off the draft message bar disappears.

The form is now read-only and answers are visible to all users who have access.

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



Disability Monitoring Reporting

Reporting has been updated in this area for the recently added disability confirmation, assessment and option fields.

The screenshot shows an employee profile form with the following fields:

- Sex: Male
- Marital Status: Widowed
- Birth Date: 12/Oct/1966 (55y 6m 10d)
- Nationality: British
- Nationality 2: [Empty]
- Ethnic Origin: White English, Welsh, Scottish, N Irish or British
- Gender Identity: Male
- Gender Reassignment: Cisgender
- Religion Or Belief: Christian
- Sexual Orientation: Heterosexual

The red box highlights the following questions and answers:

- Do you have a physical or mental health condition, illness, impairment or disability? **Yes**
- Does this condition, illness, impairment, or disability have a substantial and long-term negative effect on your ability to carry out normal daily activities or the work you can do? **Yes, a little**
- If you have indicated that you have a physical or mental health condition, illness, impairment or disability, which of the following apply to you?
 - Physical or Mobility limiting condition or disability (examples include back or joint pain, cerebral) [X]
- Disability Notes: Orthopaedic desk chair provided.

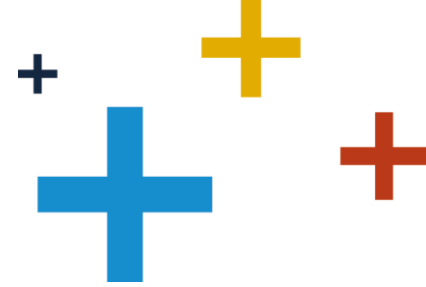
To report on these fields, in report designer select the Personal Details Table and then follow the steps below:

1. Add any identifying fields as needed from the Personal Details table (such as name etc, disability notes are also stored in this table).
2. Then to link the **Disability Options** table, select at least one field from the **Personal Disability Data** Table to make the connection.
3. You can then add the **Description** field from the three associated tables.

TIP: use your internet search (Ctrl F) to search for the tables you need

The screenshot shows the Report Designer interface with the following steps highlighted:

1. Selecting the **Personal Details** table in the Master Table dropdown.
2. Selecting the **Disability Data** table in the table selection list.
3. Selecting the **Description** field from the **Disability Data** table.



API Configuration Page

An API (application programming interface) is a connection between computers or between computer programs, typically for data exchange. They can be used to share CIPHR data with third party systems (or your own internal systems) to reduce manual administration of data, whilst also enhancing your data security and integrity.

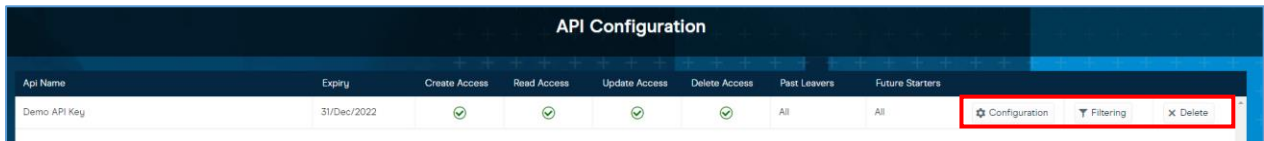
This area is typically managed by your IT Team so it is recommended to share this information with them as appropriate.

A new API configuration page has been added to allow maintenance of your existing CIPHR API configuration, including the keys, entities and properties. The page can be accessed via **System> Security> API Configuration**.

NOTE: new keys cannot be added via this page. Access to the new page should only be granted to users with knowledge of the technical set up of the API(s).

Firstly, for the appropriate user(s) to see the new page within **System> Security> Role Management> [select user role]> Actions> Pages**, grant **Access** to the new **API Configuration Page**.

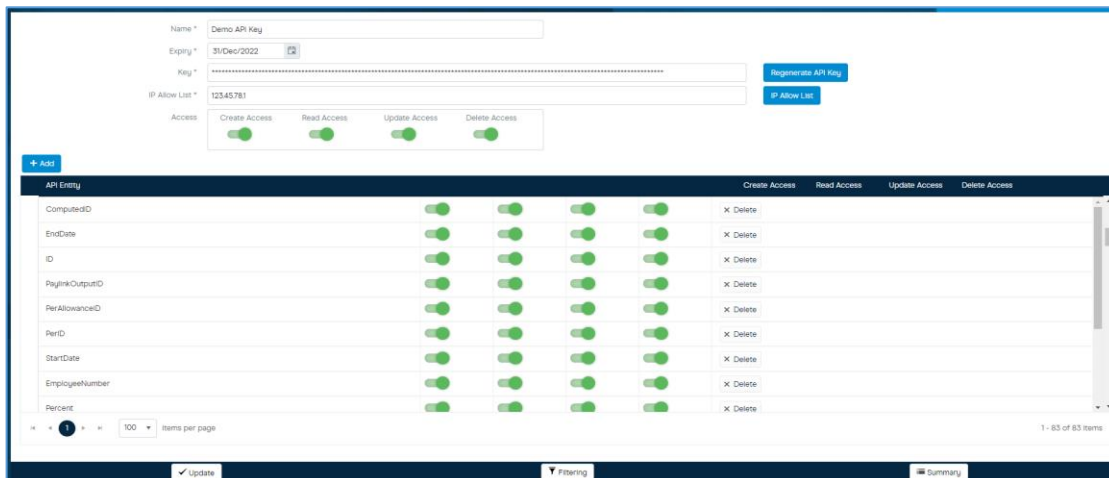
The API configuration page allows high level maintenance of keys with specific options on each key.

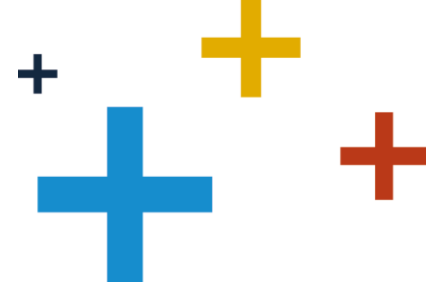


Clicking the buttons against the associated key will present different options:

Configuration view allows the following:

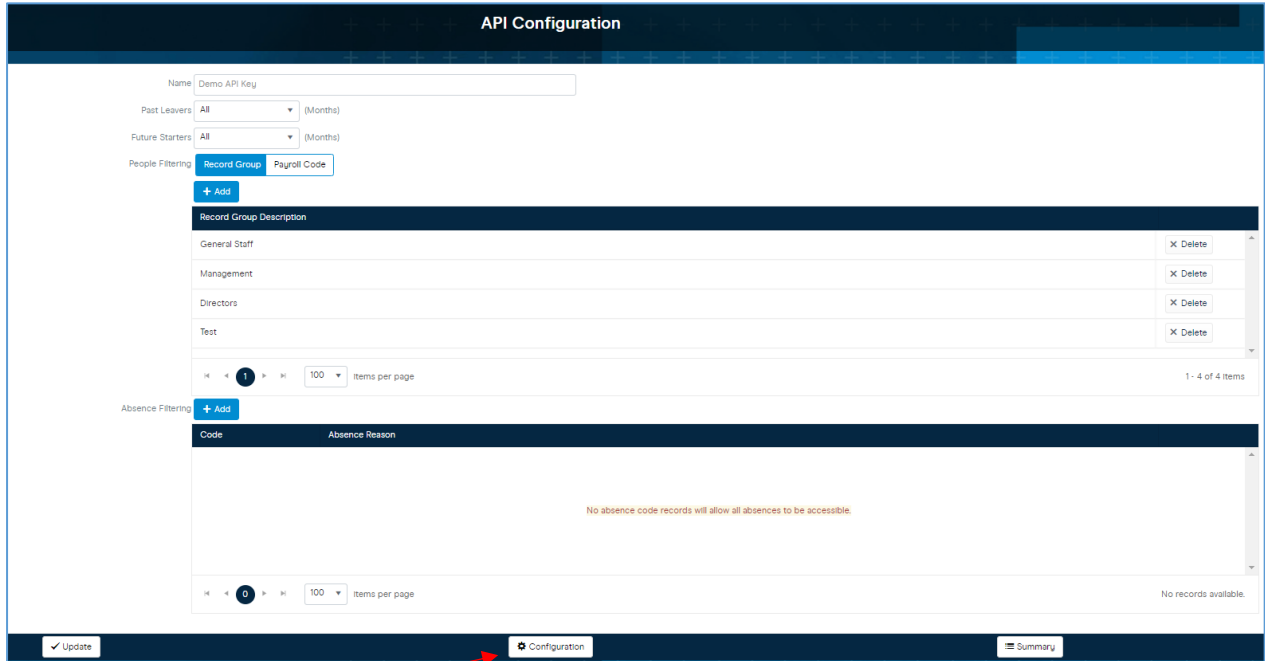
- ✓ Maintain the access of the key, entities and properties
- ✓ Re-generation of the API Key
- ✓ **NOTE:** When re-generated a once only copy to clipboard is available
- ✓ Maintain the allow list of IP addresses
- ✓ Maintain the expiry date





Filtering view allows:

- ✓ Maintenance of future starters and past leavers
- ✓ Maintenance of the people filtering (Record groups or payroll codes)
- ✓ Maintenance of the absence code filtering if the Absence entity is available for use



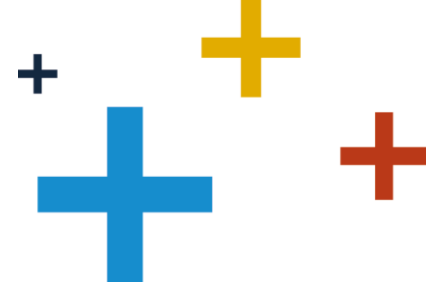
A shortcut button allows you to switch between configuration/filter options within the key.

NOTE: Master keys and hidden system keys are **not** maintainable through this page.

The maximum number of keys is maintained through a new system configuration key which is controlled by CIPHR.

Please contact Customer Support if you require assistance with these areas.

For more information on setting up APIs please speak to your customer success manager. To find out more you can view a useful webinar here: [How integrated systems could transform your HR team](#)



EXISTING FUNCTIONALITY CHANGES

OPTIONAL MODULES

Paylink Pay Data Output Reports

The following Pay Data Output reports have been amended to improve performance:

- **Pay Data Output Allowances**
- **Pay Data Output Payments**

The report templates now have additional (hidden) tabs for the Personal Allowances/Payments and Personal Details tables. As a consequence the Base Data formulas and Report pivot table have been modified to incorporate the changes but the data output from the report should not be affected.

NOTE: It is not recommended practice to amend CIPHR standard reports but in the event that the templates for these standard reports have been amended, then any bespoke changes will be overwritten by the new templates.

If you have amended the standard templates and wish to restore your changes we recommend the following options:

1. Build new reports based on the new templates (Report Designer licence required) via **Reporting> Report Admin> Report Designer> Insert New Record> Design a new report based on an existing report> select the Pay Data Output Allowances and/or Payments Template. Do not amend the standard templates.**

Select how you want to design a new report

Design a new report

Design a new report based on an existing report

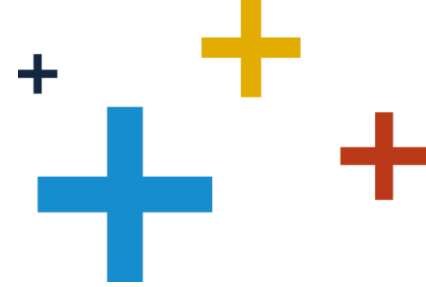
Existing report:

with formatting and fields

with fields only

A red box highlights the text 'Pay Data Output Allowances' in the search field, and a red arrow points from the text in step 1 of the instructions to this box.

2. Create a copy of the standard template(s) to then add your amendments. We suggest viewing a historical report to compare and make the necessary changes (such as layout or formulae).



EXISTING FUNCTIONALITY ENHANCEMENTS AND FIXES

Associated Ticket	Area
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Talent and Development

- | | |
|-----------|---|
| PROD-2664 | - Employee dashboard: tabs now display correctly where summary tab is first in custom order and set to hidden |
| PROD-311 | - Review form objectives (full talent management module only): now includes current rather than all objectives |
| PROD-1552 | - Talent Management Report: multiple inserts of the same review type and 'Text' – no longer duplicates data view on the specialist report |
| PROD-2525 | - Talent Management Review (full module only): Ad hoc questions can now be added without error |

Letters

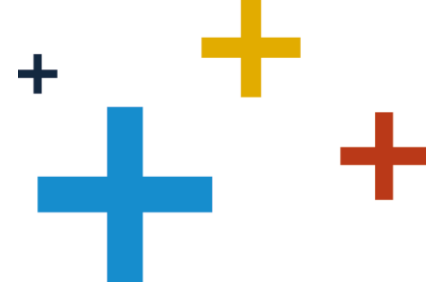
- | | |
|-----------|---|
| PROD-821 | - The link when sending letters will now use Single Sign On |
| PROD-2726 | - Edited letter templates are user/session based to prevent overlap of amendments |

Verifications

- | | |
|-----------|---|
| PROD-841 | - Additional Information: When declining an update, 'Reject Details' message now shows correct category |
| PROD-2398 | - Manage Deputy: Person to person deputy verification no longer errors |
| PROD-2448 | - Verifications: - Improvement to prevent deletion of records already in verification request process |

Absence

- | | |
|-----------|---|
| PROD-726 | - Pro-Rata Tool: Proposed Adjustment and Proposed Entitlement now display correctly where System Configuration 'Pro Rata Tool days precision' is set to 0.5 |
| PROD-2195 | - Time Off verification: Viewing the Who's Off grid while logged in as an HR user viewing a Time Off Verification will now show the manager and all other employees reporting to the manager, even if the manager is not in a Manager user role |



Associated Ticket **Area**

Reports

- PROD-1635 - Report Designer: symbols (eg '&') in report name will no longer prevent you from checking in a report
- PROD-2463 - Subsets: Performance improved when selecting criteria circle
- PROD-451 - Fields now display correctly in reports if not included in Manage Field Groups & Fields page

General

- PROD-487 - Security: Change of username now emailed to individual user
- PROD-2304 - New Employee Wizard: Users can now be added without default Absence Year and Holiday Scheme
- PROD-2635 - Language export: translation text and field capacity increased to 500 characters
- PROD-2666 - Employee Relations: Further Information fields now save correctly in draft mode
- PROD-843 - Objective Verification now appear on the Verification Dashboard Widget
- PROD-2756 - Re-Employ Wizard: Summary list field security now applies correctly
- PROD-2757

OPTIONAL MODULES

Paylink

- PROD-2754 - Pay Data Summary Report now runs as expected

Safeguarding

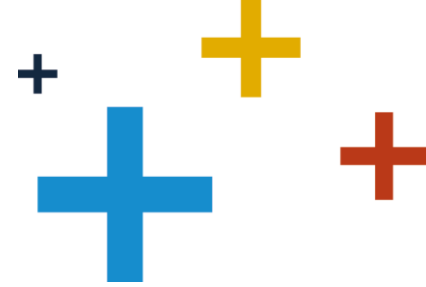
- PROD-1519 - Security: User roles with access to Safeguarding categories can now be deleted
- PROD-2667 - Safeguarding template search now accepts special characters (eg ' _')
- PROD-1550 - Safeguarding Permissions now carry over when a user role is duplicated
- PROD-2560 - Long Text Box now saves correctly on employee's record

Candidate Importer

- PROD-2373 - iRecruit: Transferring application form PDF's through candidate importer will now store correctly in Personal Documents (iRecruit V4-2.3.25 or above required).



CIPHR HR release notes 9.4



**Associated Area
Ticket**

Case Management

PROD-1725 - Case Management: Case Types drop-down list now displays in alphabetical order

Live Chat

PROD-2226 - "My Calls" and "Unassigned" menu boxes now display correctly when the topic does not have a "Topic Closure SLA ID"

PROD-2438 - Agent without a current Job and Pay will no longer prevent the ability to reassign a call

SUPPORT

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