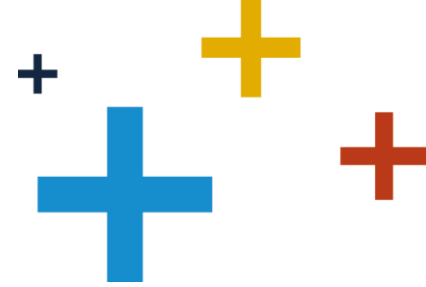


# Ciphr HR 9.7

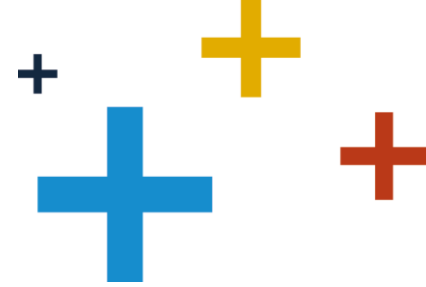
## Release notes – 9.7.4

<b>Date</b>	09.06.2023
<b>Version</b>	1.1



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## New Functionality

### Talent Management: review types enhanced security

It's now possible to apply a more granular level of security to review types, to control access using **User Role Security**, including **Record Group** access for **HR Users**, and being able to hide **Employee** review forms from **Managers**.

This enhanced security could be useful for situations such as:

- Restricting HR user record group access so they cannot see the rest of the HR team's reviews
- Restricting an employee exit interview from a manager

This functionality is available as part of Talent Management Fundamentals and is therefore available to all customers.

**Note:** Peer reviews are excluded from the enhanced security functionality and visibility will continue to be controlled by restrictions within the review type only.

### User Role Security

There are two steps to granting access to the new enhanced security:

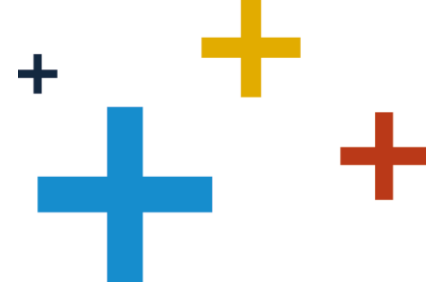
1. Firstly there is a new **Role Management Action** to make the new page; **Role Management – Review Types Access** available within **Page Access** to grant access to the **User Role**.
2. When the **Role Management Action** is accessible to a **User Role**, the new page will be visible within **Page Access** to apply the appropriate permission.

If you have a **Master Role** configured in your system, the new feature will be hidden from all users except the master role, so this will need to be made accessible to any other relevant users managing the security permissions.

If you do not have a master role configured then the **Role Management – Review Types Access Action** will automatically be enabled, so you can skip the '**Customers with a Master Role**' step below and go straight to the [Page Access](#) section.

**Note:** For more information on **User Role Configuration** and the **Master Role** please refer to the related help guides.

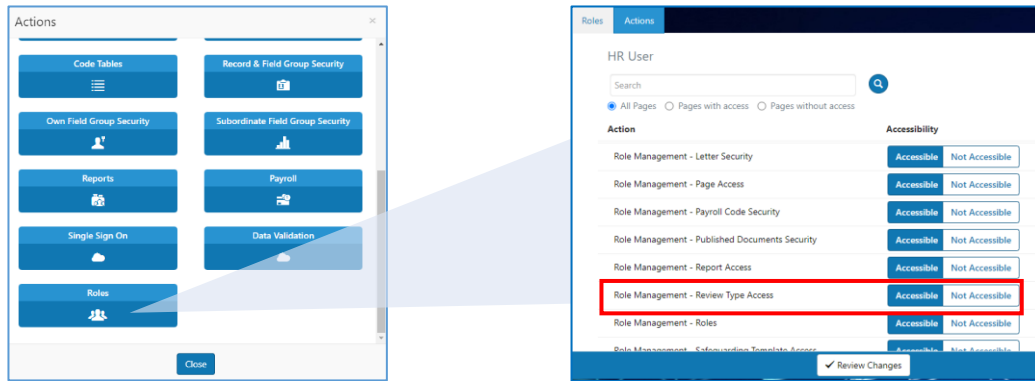
If you wish to have a master role assigned then please contact [Customer Care](#) to confirm which user role you would like to apply this to.



## Customers with a Master Role

A user in the master role will need to go to **System > Security > User Role Management > [select User Role] > Roles**.

Scroll down to the bottom of the **Actions** window and click **Roles**.

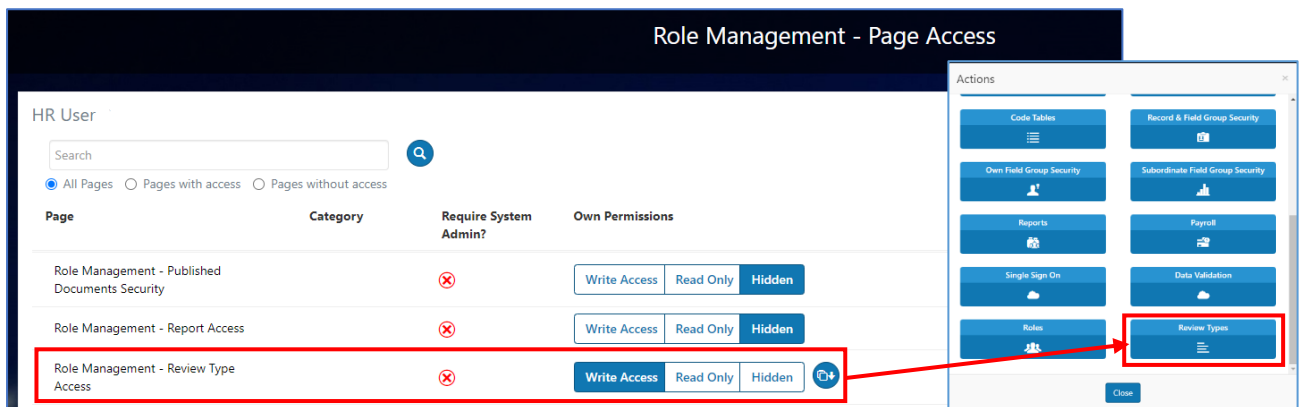


Click on the **Actions** Tab and then amend **Role Management – Review Types Access** to **Accessible**, to make the page available to apply permissions.

Click **Review Changes** and then **Update** to save the changes.

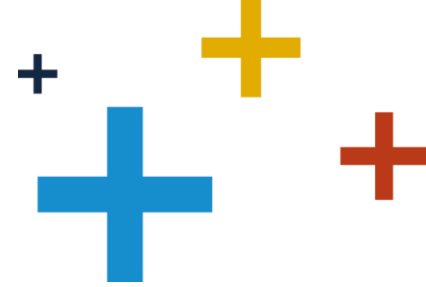
## Page Access

Click on the relevant user and select **Pages** to check the page **Role Management – Review Type Access** and amend to **Write Access**.



Click **Review Changes** and then **Update** to save the changes.

The user role will now have access to the **Review Types** action button.



## Review Type configuration

Once your user role has the appropriate permissions you can apply enhanced security to individual review types.

Go to **System > Talent Management Configuration > Review Types** and select a review type.

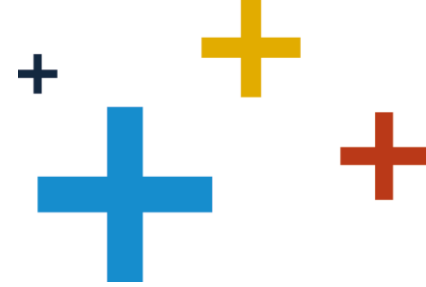
A new **Enhanced Security** slider has been added to the bottom right of the page. This can be used if you wish to enhance security permissions beyond the normal settings on this page, to have more granular control over which user roles can access the reviews, including **Record Group** restrictions for **HR type users**.

**Note:** The '9 Box Quick Entry' (full module only) and 'Performance Review' (associated with Pay Review) types are read-only and enhanced security cannot be applied to these specialist review types. For more information on this **Review Type configuration** please refer to the related help guides.

The screenshot shows the 'Review Types' configuration interface. It includes various settings such as 'Description', '9 Box Ratings', 'Base Form', and several toggle switches for 'Allow Employee Reviews', 'Allow Manager Reviews', 'Allow Peer Reviews', and 'Anonymise Peer Reviews'. There are also sections for 'Include Objectives', 'Flight Risk Enabled', 'Include Job Requirements', and 'Include Review Rating'. At the bottom right, the 'Enhanced Security' toggle is turned on and highlighted with a red box. The interface also features 'Update' and 'Summary' buttons at the bottom.

**Note:** Turning on the enhanced security will make it inaccessible to all user roles, so you will need to grant access to the user roles who should see it.

When creating a new review (full Talent Management module only) and you enable the slider, when you click **Update** to save, a message will appear.



If you have granted your user access following the security steps in the previous section, you will see this message, with a link to set the access:

**Review Type Saved.**

The review type has been saved, however reviews using this type will not be accessible until access has been granted.

Please use the View Review Type Access button below to set the access rights to reviews using this review type.

☰ Summary
➔ View Type Access

For users who don't have the role management access they will receive this message and will need to inform the appropriate user to apply the permissions.

**Review Type Saved.**

The review type has been saved, however reviews using this type will not be accessible until access has been granted.

Please speak to a system supervisor to get access to reviews using this review type.

☰ Summary

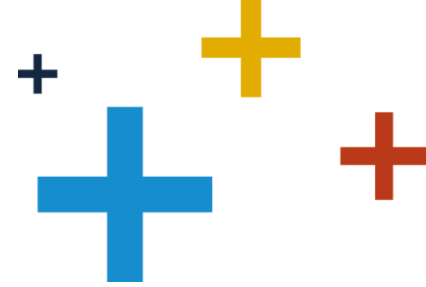
A user with permission can click on the **View Type Access** button to be redirected to the new **Role Management Action: Review Type Access**.

Alternatively, if updating an existing review type there will be no pop-up message but you can access the security settings via **System > Security > User Role Management > [select User Role] > Review Types**.

Role Management - Review Type Access			
HR User			
<input type="text" value="review"/>			
<input checked="" type="radio"/> All Review Types <input type="radio"/> Review Types With Access <input type="radio"/> Review Types Without Access			
Review Type	Record Groups	Own Permissions	Subordinate Permissions
Performance Review	All Record Groups X	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>
Performance Review Category Type	All Record Groups X	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>
Probation Review	General Staff X Management X	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>
Standard Review	All Record Groups X	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>
TM Review Type	All Record Groups X	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>	<input type="button" value="Accessible"/> <input type="button" value="Not Accessible"/>

✓ Review Changes
☰ Summary

Reviews without enhanced security will be faded as they are read-only. If viewing an HR type user role there will be an additional column called **Record Groups**, which will show 'All Record Groups' if enhanced security is not enabled as there are no restrictions.



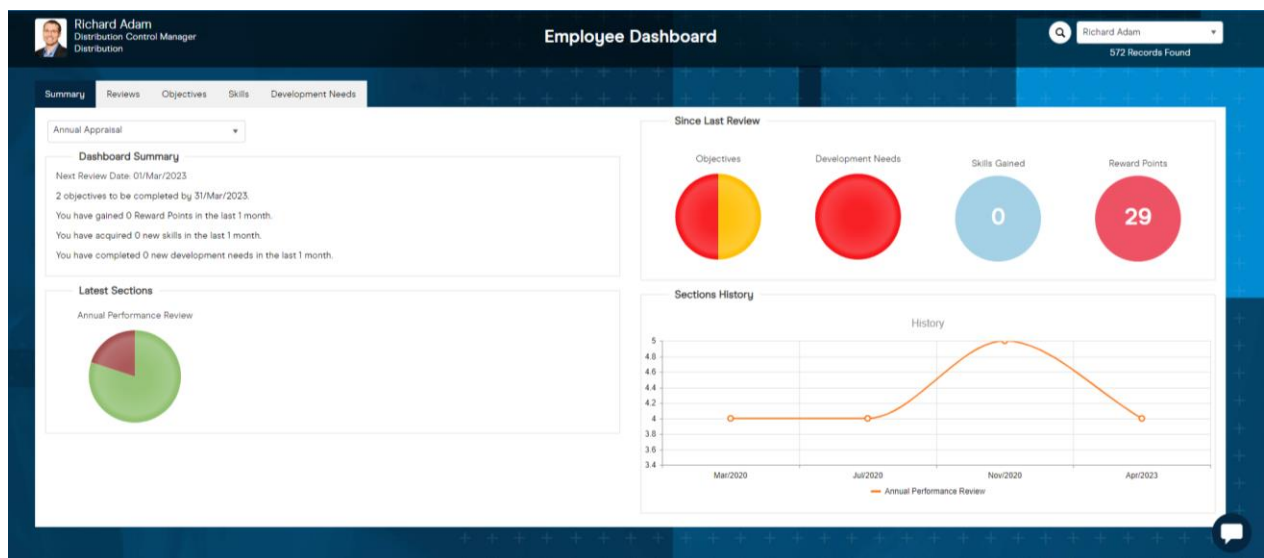
Where you have enabled enhanced security, you can set permissions as appropriate but note due to the addition of record groups, the columns work slightly differently to other areas:

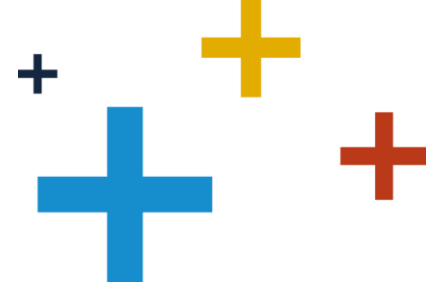
Security	Records	Options
<b>Record Groups</b>	<p>Click into the field to select the record groups that you wish the user to have visibility of in relation to this review type.</p> <p><b>Any Record Groups not included will be hidden from the user for this review type, eg Directors.</b></p>	
<b>Own Permissions</b>	Your own reviews.	<input type="checkbox"/> Accessible <input type="checkbox"/> Not Accessible
<b>Subordinate Permissions</b>	Subordinates reporting into you (record groups controls the other 'subordinates' an HR user can see).	<input type="checkbox"/> Accessible <input type="checkbox"/> Not Accessible

**Note:** Own and Subordinate permissions take priority over the Record Group permissions..

### Employee Dashboard Summary

The **Employee Dashboard Summary** tab can display rated (1-5) questions in the **Latest Sections** and **Sections History** areas, if configured to 'Include In Dashboard' within the **Review Form Configuration**.





Enhanced Security will apply to the **Dashboard Summary** for employees and managers as follows, when displaying submitted scores that have been configured to **Include in Dashboard**:

User scenario	Access to employee review?	Access to manager review?	Dashboard View
Employee viewing own record	✓	✗	Own score
	✓	✓	Average of employee/manager score
	✗	✓	Manager score
	✗	✗	Dashboard displays 'No Data'
Manager viewing subordinate	✓	✗	Subordinate's score
	✓	✓	Average of employee/manager score
	✗	✓	Manager (own) score
	✗	✗	Dashboard displays 'No Data'

**Note:** Enhanced security on the Employee Dashboard Summary scores does not currently apply to **Record Group** security.

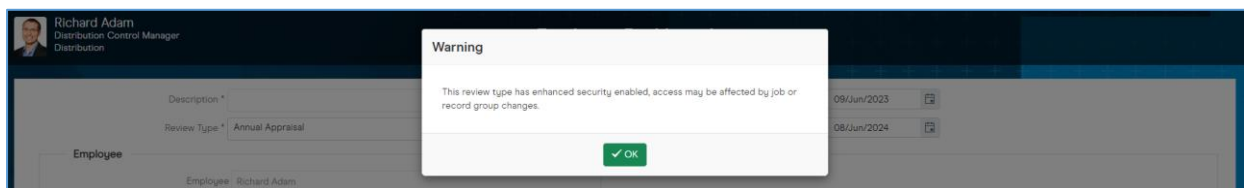
**Note:** For more information on **Employee Dashboard** and **Review Form** configuration please refer to the related help guides.

### Warnings

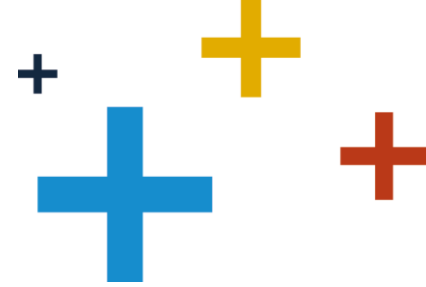
The following warnings will now appear when making amendments in the following areas:

**Talent & Development > Talent Management > Employee Dashboard > Reviews**

When inserting a new review type **with Enhanced Security enabled**, this message will pop up:

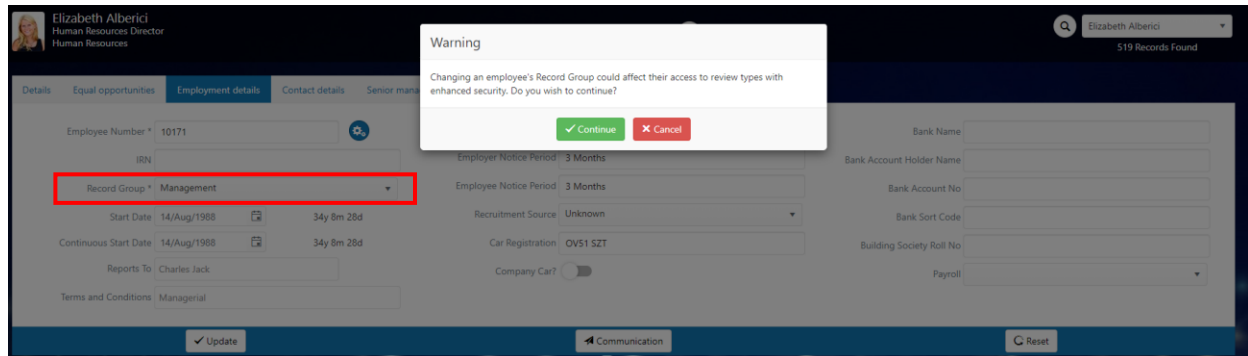


A similar message will also appear if inserting a review type **with Enhanced Security enabled** via **People Admin > Tasks > Bulk Change**.



## Personal Data> Personal Information> Personal Details> Employment Details

Changing the Record Group will produce this warning when you click Update.



## System> Security> User Role Management> [select User Role]> Users

Changing someone's User Role will produce this warning when you click Review Changes.

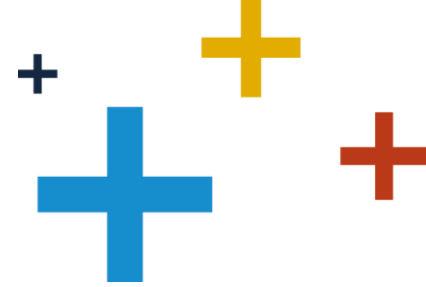


**Note:** If you use the additional **Languages** feature the new messages and 'enhanced security' field are available in the **Export** for translation.

For more information on this Languages please refer to the related help guides.

## Specialist Report

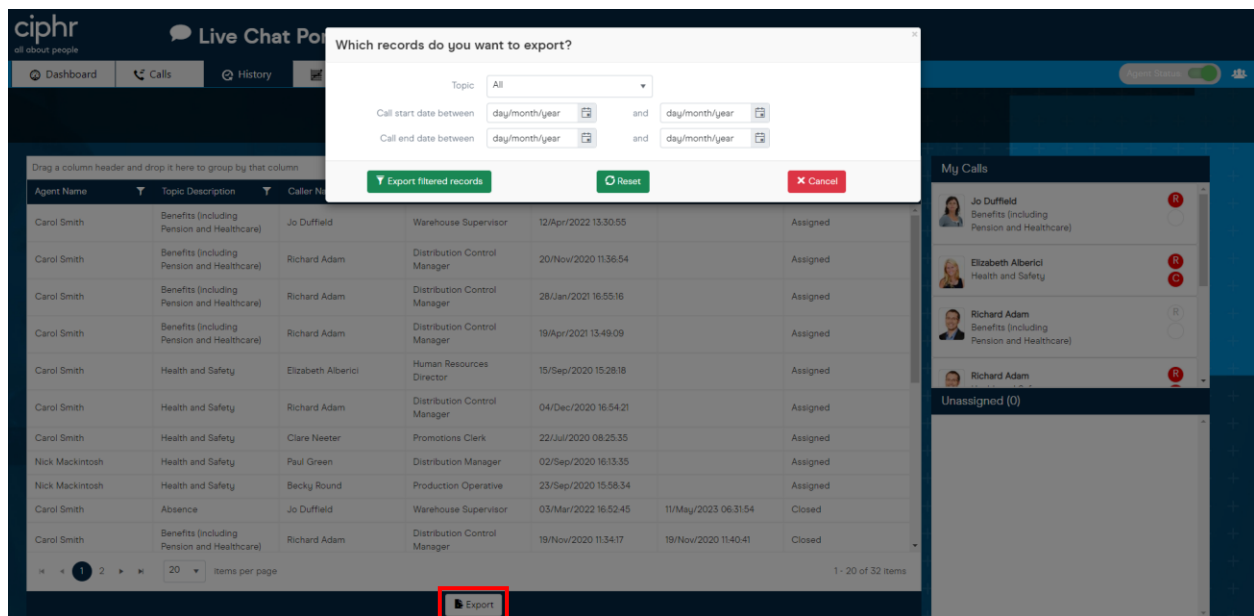
The enhanced security settings apply to the Talent Management Report in the same manner if you wish to apply restrictions for users running the report.

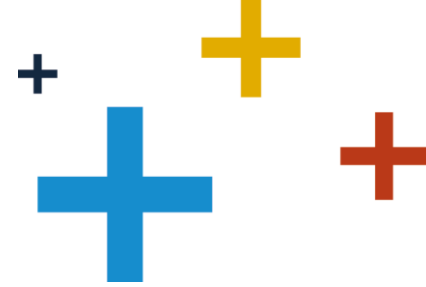


## PROD-2700 - Ability to export Live Chat Portal data of queries over period of time

It's now possible to Export data from the Live Chat portal.

Go to **My Company**> **Live Chat Portal**, within the **History** tab, an **Export** button is at the bottom of the page. Click the button to open a window of filter options to export the data into Excel.





## Existing Functionality Changes

### PROD-4263 - Live Chat: Multi Entity restrictions can now be applied to Topics

If you have the **Live Chat** and **Multi Entity** features enabled, you can now assign **Topics** to **Entities** so they will only be visible to the relevant employees.

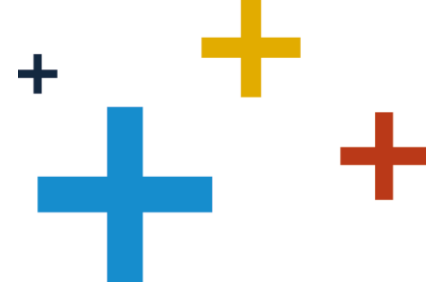
**Note:** When your system is updated, all topics will be assigned to all entities so that access is maintained.

To apply the new restrictions, go to **My Company > Live Chat Portal**, then within the portal go to **Settings > Topics**.

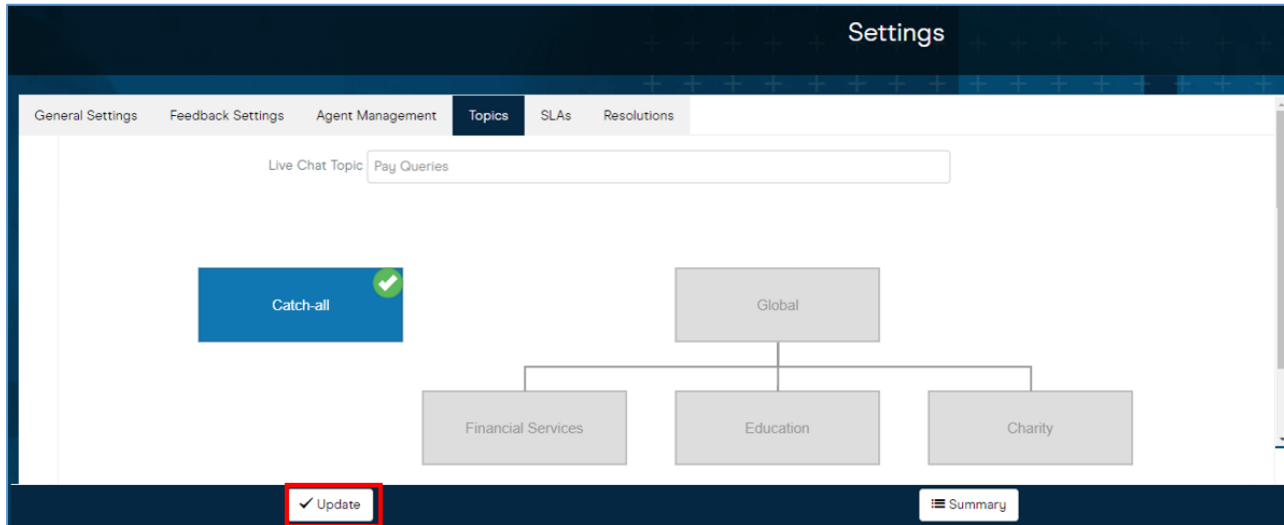
**Note:** For more information on **Live Chat** configuration please refer to the related help guides.

Settings			
General Settings Feedback Settings Agent Management <b>Topics</b> SLAs Resolutions			
Topic Description	Topic Ceased Date	Number of Agents Assigned	
Absence	⊗	3	Multi Entity
Benefits (including Pension and Healthcare)	⊗	6	Multi Entity
Contract Harmonisation	⊗	3	Multi Entity
Health and Safety	⊗	5	Multi Entity
IT	⊗	3	Multi Entity
Learning and Development	⊗	4	Multi Entity

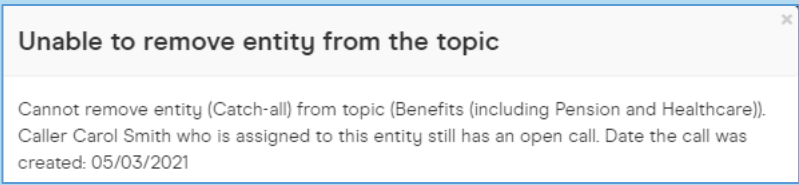
A new column on the right shows a **Multi Entity** button for each **Topic** so you can click to apply restrictions.



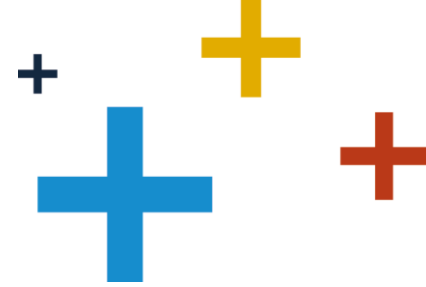
Scroll down using the slide bar scroller to click **Update** to save your changes.



**Note:** Existing call visibility will not be affected by restrictions but if you attempt to remove an entity from an existing topic where there are related open calls (ie a caller is attached to the entity) you will receive the message below and the entity will automatically be reassigned.



All related calls must be closed and then the topic can be unassigned from certain entities as required.



## PROD-936 - New Employee Wizard: Absence stage update

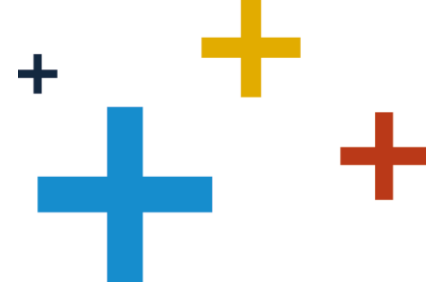
When adding a new record via **People Admin > New Starters > New Employee Wizard**, if the **Absence** stage is enabled for manual entry of absence information, this will now show the system default absence information (if populated) which can be amended as necessary.

## Terms and Conditions

If you have attached absence information to **Terms and Conditions (T&C)** this will be assigned at the later **Job and Pay** stage of the Wizard but any T&C updates that differ to the default absence information will not be applied until the Wizard is complete and the new record has been saved.

You can check the absence information in **People Admin > Time Management HR > Absence Summary Totals** but **note** any T&C changes will not be visible for future starters until their start date is reached. This also applies to pro rata adjustments if you have automatic adjustments turned on (see Configuration section below).

Therefore, if adding future starters with absence information different to the default entries, and pre-arranged absence needs to be recorded before they start, it is recommended to apply the correct holiday scheme and process the pro rata calculation manually so that this information is visible immediately.



## Configuration

The following areas are related to this update.

**System > System Configuration > System Settings > System Wide Defaults**

Absence Year and Holiday Entitlement default settings

**System Settings**

System Settings | Name Fields | Organisation Groupings | **System Wide Defaults** | Code Preferences | Validation Preferences | Configuration | Messages | Security

Default Record Group: Management

All Staff Set Description: All staff

Current Staff Set Description: Current staff

Leavers Set Description: Leavers

Nationality: British

Default Currency: Sterling

System Home Currency: Sterling

Starter Reason: Starter

Normal Rounding: 0.01

Terms and Conditions: Clerical

**Default Absence Year: Standard**

**Default Holiday Entitlement: Standard Days**

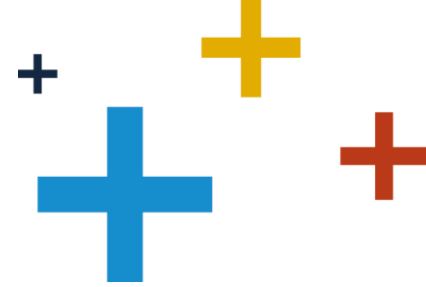
[Update] [Reset]

**System > System Configuration > System Configuration**

- Workflow Group > Show Absence on New Employee Workflow
- General Group > Automatically pro rate holiday entitlement

System Configuration			
Group Name ↓	Name	Description	Value
Workflow	Show Absence On New Employee Workflow	Should absences be shown on the new employee wizard	false
General	Automatically pro rate holiday entitlement	Automatically run the pro rata part time holiday process when appropriate fields have changed in jobpay and holiday entitlement	true

For more information on System Settings and Pro Rata Holiday Calculations please refer to the related help guides.



## General Enhancements and Fixes

This area relates to bug fixes, general and suggested improvements. Where there is a ticket number you can check if this is an area you have been affected by.

### Associated Ticket

### Area

#### Absence

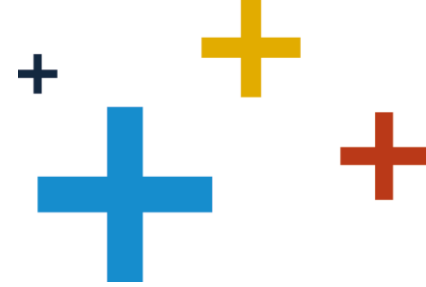
- PROD-3410 - **Holiday Entitlement:** Holiday taken before employee start date is now deducted correctly, when the holiday entitlement is based on continuous start date
- PROD-2869 - **Holiday Year:** Future starters will no longer carry forward holidays during holiday rollover
- PROD-5283 - **Absence Documents:** Delete button now hidden from non-HR users
- PROD-458 - **Time Off:** Summary 'Update Holiday Left' field now calculates correctly where an absence has been amended and is pending verification

#### Job and Pay

- PROD-2494 - **Pay Review:** New variable Allowance records are no longer created in error alongside Job and Pay entries
- PROD-4703 - **Pay Review:** Terms and Conditions rules will no longer be applied to the new Job and Pay Record
- PROD-4664 - **Job and Pay:** Basic Pay field security now applies correctly to table summary grid. **Note: there are two Basic Pay fields in the Job and Pay Details table when applying field security (one on the page and one in the summary grid)**

#### Talent and Development

- PROD-4609 - **Talent Management Reviews:** "The section is empty" error for employees deputising for their manager has been resolved
  - Development Needs: Select a Course search button will now become read only once a course has been matched as Associated Training
- PROD-2819 - **Talent Management Specialist Report:** Error when running larger amount of data resolved

**Associated Ticket****Area****General**

- PROD-3397 - **Letter Store:** Template properties document default notes now permits 500 characters in line with warning message.
- PROD-4592 - **Multi-Level Verifications:** Leavers in a HR User role will no longer receive verification emails
- PROD-2741 - **Personal Details: Employment Details** length of service now calculates correctly when processing a leaver with a past leave date
- PROD-4897 - **Reports:** Saved offset filters now calculate the last day of the month correctly
- PROD-5194 - **Languages:** Reward Points header in pop-up from Employee Directory is now translatable

**Optional Modules**

- PROD-4518 - **Timesheets:** Ceased Projects can no longer be selected in an employee's Timesheet after the cease date
- PROD-5375 - **Timesheets:** Approvals by different users within quick succession of each other no longer create duplicate records on the Timesheet Analysis report
- PROD-5081 - **Import/Export Entity (Payments/Allowances Importer):** Imports are no longer sent for verification where the user has appropriate permissions

**Support**

For more details on general functionality please refer to the related help guides on Ciphr Academy.