



5.25 Release Notes

New Features - Overview

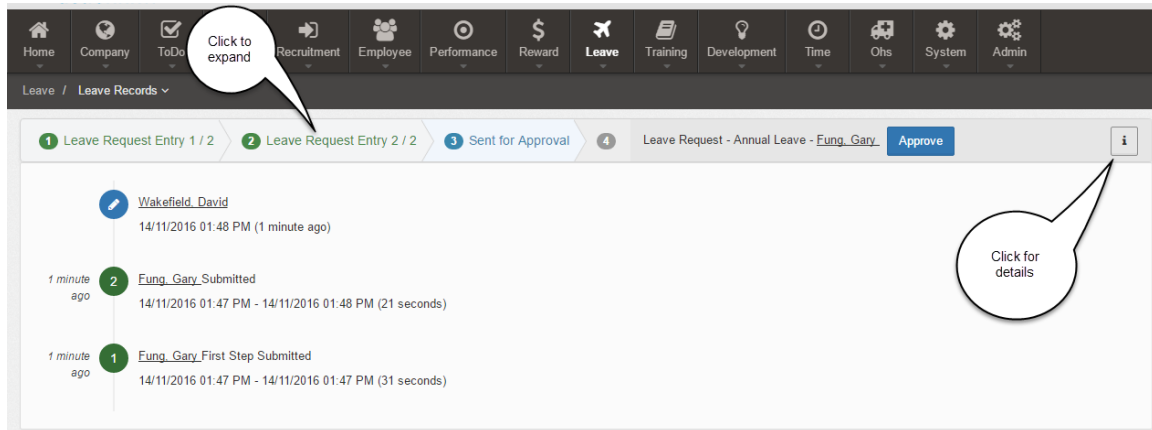
- Improved workflow step view
- Improved Organisation Chart
- Interview scoring
- Archive / Delete now mass action
- Partial Processed Leave Status
- Search function in every area of WHS – All, Incident, Hazard
- Training Plan extensions
- Training Invitation Management
- New File Uploader
- Employee Groups – multiple & complex filters
- Skill Gap Position Identifier Pop Ups
- Skill Gap Excel Reports
- Calendar View in Planner
- Return to original WF search page after WF execution
- Add Position prompt
- New Processor Types
- Check Boxes and Multi Select added to Custom Fields
- New Positions Listing page
- Recruitment Notification changes
- New ToDo - Actions





New Features - In Detail

Improved workflow step view

In this release, we have updated the workflow step view. The workflow route now appears at the top of each workflow, with an option to click for more details / information. We hope that this helps you to understand where the workflow is sitting at any one time, and where it will go after you have forwarded it / sent it back / approved it / denied it etc.

It also keeps track of the date and time of workflow actions. This is a good way to monitor who is using the system efficiently and who might need some help / training.



The new  button also combines the function of zoom and edit buttons  . Where previously you had the option of clicking on either depending on what view you wanted, now you will just click on  to access workflows / recruitment processes etc.

Improved Org Chart

We have improved the functionality of the Org Chart. You will now be able to zoom in and expand (using the arrows) to see relationships.

We have added a box at the bottom of the page containing a list employees with no Reports to Linkage.

We have also made it possible for you to Export your on-screen Org Chart (with filters) using the Export button in the top right of the screen.

We hope that these functions allow you to navigate and manage the Org Chart better than before.

We will be looking to extend the Org Chart further and would love to hear your feedback.


The image displays two screenshots of an organizational chart system. The top screenshot shows a hierarchical view where 'Adams, Kent' (Chief Executive Officer, Management) is at the top, reporting to 'Brown, Mark' (Accountant, Administration). 'Brown, Mark' has two direct reports: 'Jones, Ads' (Office Assistant, Administration) and 'Smith, Jess' (Help Desk Support, Support). A red arrow points to the 'Brown, Mark' box, which has expand/collapse arrows on its sides. The bottom screenshot shows a wider view of the organization. 'Adams, Kent' is at the top, with a horizontal line below it connecting to several other roles: 'Brown, Mark' (Accountant, Administration), 'Jang, James' (Office Assistant, Administration), 'Tran, Leanna' (IT Area Manager, Management), 'Parks, Scott Wilson, Joe' (Java Developer, Management), 'Echter, Adam' (Senior Project Manager, Management), 'Wakefield, David' (Development Manager, Programming), and 'Rodrick, Alexander' (Infrastructure Manager, Programming). 'Brown, Mark' is circled in red, and a red arrow points to it. Below the chart is a table titled 'Positions without Reports To linkage'.

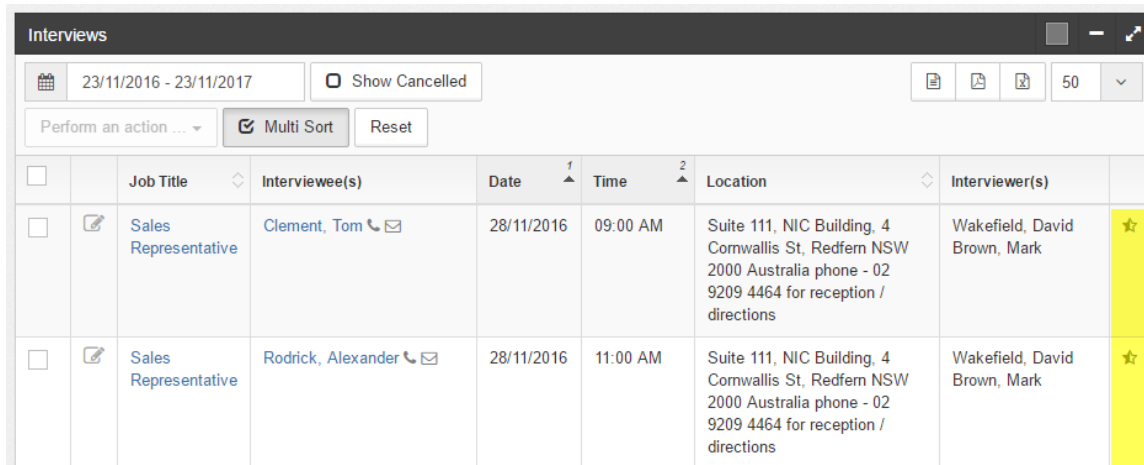
Job Title	Department	Incumbent
ActionHRM Specialist	QA & Testing	Kelly, Adam
Office Assistant	Management	Ulshafer, Courtney
Sales Representative	Sales	McLaren, Sally

Showing 1 to 3 of 3 entries

Interview scoring

Extending on the Interview Management area, and based on client feedback, in this release we have added Interview Scoring functionality.

Once you have scheduled interviews (by opening applicant's details and clicking Perform an Action > Schedule Interview), you will now be able to add a score for each Interviewer. To do this, go to Recruitment > Interview Management > click on the  (on the right-hand side of Interview details)



<input type="checkbox"/>	Job Title	Interviewee(s)	Date	Time	Location	Interviewer(s)	
<input type="checkbox"/>	Sales Representative	Clement, Tom	28/11/2016	09:00 AM	Suite 111, NIC Building, 4 Cornwallis St, Redfern NSW 2000 Australia phone - 02 9209 4464 for reception / directions	Wakefield, David Brown, Mark	★
<input type="checkbox"/>	Sales Representative	Rodrick, Alexander	28/11/2016	11:00 AM	Suite 111, NIC Building, 4 Cornwallis St, Redfern NSW 2000 Australia phone - 02 9209 4464 for reception / directions	Wakefield, David Brown, Mark	★

After clicking the , the Interview Details page will appear.

Beside each of the Interviewers, there will be a box to input a point score. Points can be between 0 – 10, 0 – 100, whatever suits your company best.

From this page, you will also be able to update the status e.g. Successful (and leave comments), and the banding e.g. Meets Requirements (and leave comments).

Interview Details		
Job	Sales Representative	
Date	28/11/2016	
Time	09:00 AM	
Time Zone	Australia/Sydney	
Location	Suite 111, NIC Building, 4 Cornwallis St, Redfern NSW 2000 Australia phone - 02 9209 4464 for reception / directions	
Interviewer(s)	Wakefield, David Brown, Mark	

Scores		
Interviewer(s)	Interviewee(s)	Points
Brown, Mark	Clement, Tom	8
Wakefield, David	Clement, Tom	7.5

Status	
Mark As	Successful <input type="button" value="x"/> <input type="button" value="v"/>
Comment	Happy with Toms interview - add to shortlist for second round interview
Enable notification	<input type="checkbox"/> <input type="button" value="Position Withdrawn"/>

Banding	
Choose Band	3 - Meets Req. <input type="button" value="x"/> <input type="button" value="v"/>
Comment	Could have more experience but has great references


Once all scores have been input, the Interview Score Total and Interview Score Average will display under the Recruitment > Processes > Applicant tab.

Partial Processed Leave Status

For some Payroll and Non- Payroll systems we have added a new Leave Status to reflect a Part - Processed record.

This new feature is useful when an employee has leave over multiple pay periods, and only a portion of the record is sent to Payroll at any one time.

Leave Records							
Start Date	04/06/2016	End Date	dd/mm/yyyy	<input type="checkbox"/> Show Cancelled Records		Apply	
	Leave Type	From	To	Hours	Days	Status	
🔍	Annual Leave	17/01/2017	25/01/2017	52.5	∞	N/A	
🔍	Personal Leave	16/11/2016	17/11/2016	12	∞	Extracted	
🔍	Unpaid Leave	09/11/2016	09/12/2016	172.5	∞	Part Processed	
+							
Showing 1 to 3 of 3 entries							

You can also click  to see more details, i.e. exactly which days / hours in the record are paid / processed and which will be in the next pay period.


Mon 28/11/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	Processed
Tue 29/11/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	Processed
Wed 30/11/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	Processed
Thu 01/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Fri 02/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Sat 03/12/2016		0.00	0.00	0.00	0.00	0.00	0.00	N/A
Sun 04/12/2016		0.00	0.00	0.00	0.00	0.00	0.00	N/A
Mon 05/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Tue 06/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Wed 07/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Thu 08/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Fri 09/12/2016	(worked day)	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Total		172.50	172.50	0.00	23.00	23.00	0.00	
Submitted Hours				172.5				
Processed Hours				120				
Approved By				Adams, Kent				
Approved Date				01/11/2016				
Additional Note								

WHS Search Functionality

In this release, we have extended the search capability in the WHS module. You can now search Hazard or Incident specific fields e.g. in the *Incidents* tab you can filter by Injury Nature or Treatment Date, in the *Hazards* tab you can filter by Risk Severity or Action Satisfied status. You can still filter for common data in the *All* tab.

The screenshot shows the 'OHS Issue Details' interface with the 'Incidents' tab selected. A search bar is visible with a 'Search' button and a 'Filter' dropdown. A dropdown menu is open, showing various search criteria: 'Hours Worked', 'Is Injured?', 'Is treatment required?', 'Treatment anticipated date' (highlighted), 'Actual treatment date', 'Loss of time?', and 'Ceased date'. Below the dropdown, a table of incidents is displayed with columns for OHS ID, Issue Type, Issue Category, Status, Current Processor(Delegatee), Risk Level, Work Area, and Location. Two incidents are visible, both with a 'High' risk level highlighted in yellow.

OHS ID	Issue Type	Issue Category	Status	Current Processor(Delegatee)	Risk Level	Work Area	Location
INC2	Incident	Minor	Reviewed		High	Main Entrance	Sydney
INC4	Incident	Major	Reviewed		High	Main Entrance	Sydney

More searchable fields mean you also have more displayable fields. Use the  button (top right corner) to adjust display fields or save default display fields.

Search Table Display Field Template (Drag & Drop to reorder) ×

Display Fields	Available Fields
Title	Risk Model
Detailed Description	Risk Severity
OHS ID	Risk Occurrence
Issue Type	Reported Time
Issue Category	Reported By
Status	Investigated By
Current Processor(Delegatee)	Reported To
Risk Level	Report Method
Work Area	Investigation Start Date
Location	Investigation End Date
Locality	Protective Equipment Used
Reported Date	Equipment Involved

Training Plan

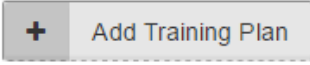
In the last release, we incorporated a Training Plan in the Development > Training Records area. Ultimately, we want this to link to Training > Courses, and Development > All Skills, but in this release, we have made the training plan employee specific.

Target Date *	Employee	Specification Skill	Title *	Type *	Description	Priority *	Status *	Comments
03/11/2016	empty	Drivers Licence	Full Licence	License	empty	High	Requested	empty
01/07/2014	Wakefield, David	Organisation & Planning	Training	Performance Management	empty	High	In Progress	empty
20/07/2016	Smithston, Adam	Leadership	Leadership Training	Performance Management	empty	High	In Progress	empty
13/06/2014	Wakefield, David	Project Management	Project Management Training	Performance Management	empty	Low	Completed	empty
12/08/2016	Cooper, Milly	ActionHRM Handbook	Handbook for New Starts	Performance Management	empty	Low	Completed	Please read and complete questions in 2016 handbook
23/08/2016	Fung, Gary	RSA (Responsible Service of Alcohol)	RSA	Performance Management	empty	Low	Completed	Upload Certification
11/10/2016	Fung, Gary	Payroll	Payroll Training	Performance Management	empty	Normal	Outstanding	With Milly and Jo
30/11/2016	empty	Customer Service	Customer Service Training	Skill	empty	High	Outstanding	Training (and mentoring)

Showing 1 to 8 of 8 entries

+ Add Training Plan

To set up a training plan, go to Development > Training Records > Training Plan tab > click the

Add Training Plan button  (bottom of page)

You will need to input a target date, an employee, a specification / skill, a title, a training type, a training priority, and a training status.

+ Add Training Plan

Target Date *
30/06/2017

Specification Skill
Project Management

Type *
Employee Development

Priority *
Normal

Comments

Employee
Jones, Matthew

Title *
Matt - Training Plan


Description

Status *
Requested

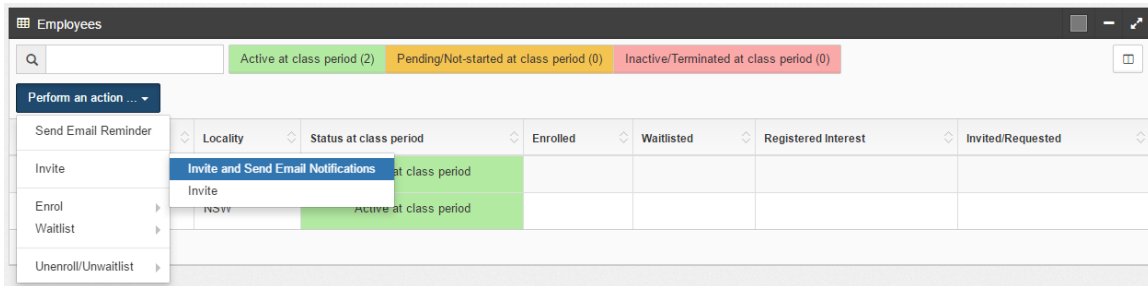
✓ ✕

Training plan *type*, *priority*, and *status*, can be set up under Development > Admin

Training – Invitation Request Management

In this release, we have made improvements to the enrolment area within Training > Courses. As always, once you are viewing course details (using the  function), you can click between tabs for course details, class details, enrolment info, attendee list, and waitlist. Within the enrolment tab, you can see class information and use filters to find and invite employees with skill gaps and expired skills, from specific localities, departments, employee groups etc.

You will now be able to check box beside employees names, click 'Perform an Action', and send reminders, custom emails (change of locations / cancellations etc), invite, enroll, or waitlist employees (with notifications).



Once employees have been *enrolled*, they will automatically appear under the Attendees tab.

Course Details	Class Details	Enrolments	Attendees (2/5)	Waitlist	Invitation Request Management
Class Information					
Course Title	Awareness Fire Safety Training				
Start Date	26/01/2017	Min. Attendees	2		
End Date	26/01/2017	Max. Attendees	5		
Start Time	08:00 AM	Current Attendees	2		
Duration	3.0 Hour(s)	No. of Seats Remaining	3		
Attendees					
<input type="text"/> ☰					
Perform an action ... ▾					
<input type="checkbox"/>	Enrolled Date	Enrolled Time	Name	Attended	Details
<input type="checkbox"/>	22/11/2016	02:27 PM	Adams, Kent	Unproces: ▾	Please choose an option
<input type="checkbox"/>	22/11/2016	02:27 PM	Brown, Mark	Unproces: ▾	Please choose an option


If you *invite* employees, they will get a tick in the 'Invited to Course' box, and they will appear in the NEW Invitation Request Management tab – Invitation Management. In this tab, you will be able to see their status as “Waiting for attendance”

Name	Locality	Status at class period	Enrolled	Invited To Course
Adams, Kent	NSW	Active at class period		✓
Brown, Mark	NSW	Active at class period		✓

Showing 1 to 2 of 2 entries

Name	Email	Job	Course Name	Course Code	Time Zone	Start Date	End Date	Provider	Location	Workflow Status
Adams, Kent	kent.adams@companymail.com	Chief Executive Officer	Awareness Fire Safety Training	Safety	Australia/Sydney	26/01/2017	26/01/2017	Internal	Main Conference Room	Waiting for attendance
Brown, Mark	mark.brown@companymail.com	Office Manager	Awareness Fire Safety Training	Safety	Australia/Sydney	26/01/2017	26/01/2017	Internal	Main Conference Room	Waiting for attendance

The invited employees will receive a workflow and will be able to specify their class attendance and input any comments.

NOTE: click on the  button on the top right corner of the workflow (highlighted) to view more information

Once the employee has updated their attendance, their workflow status will be updated.

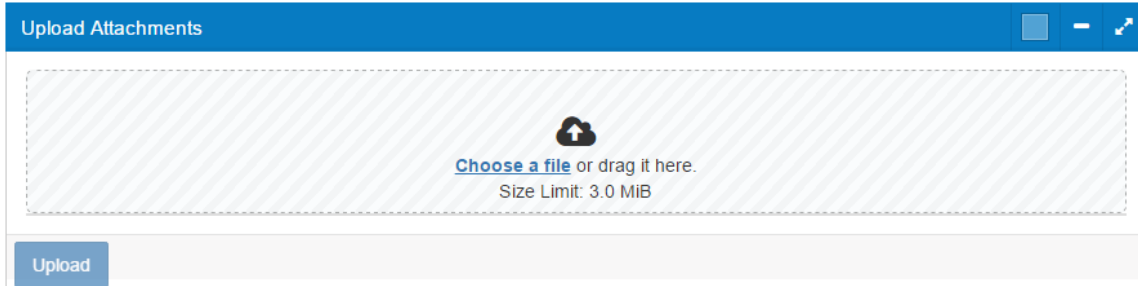
Course Details											
Class Details											
Enrolments											
Attendees (1/5)											
Waitlist											
Invitation Request Management											
Invitation Management											
Request Management											
Manage Invitation By Employee											
<input type="text"/>											Search
<input type="text"/>											+ Filter
Perform an action ...											
<input type="checkbox"/> Multi Sort											
Reset											
<input type="checkbox"/>	Name	Email	Job	Course Name	Course Code	Time Zone	Start Date	End Date	Provider	Location	Workflow Status
<input type="checkbox"/>	Adams, Kent	kent.adams@companymail.com	Chief Executive Officer	Awareness Fire Safety Training	Safety	Australia/Sydney	26/01/2017	26/01/2017	Internal	Main Conference Room	Approved
<input type="checkbox"/>	Brown, Mark	mark.brown@companymail.com	Office Manager	Awareness Fire Safety Training	Safety	Australia/Sydney	26/01/2017	26/01/2017	Internal	Main Conference Room	Waiting for attendance

The reason we created this new Invitation Request Management tab is so that Training Administrators can quickly complete or cancel requests in the one area.

The tab is also class specific, e.g. if you zoomed in on a First Aid Class for 10 December, the Invitation Request Management tab would appear alongside the standard tabs (enrollments, attendees etc.) and it would display the Invitation Requests for the First Aid Class 10 December.

File Uploader

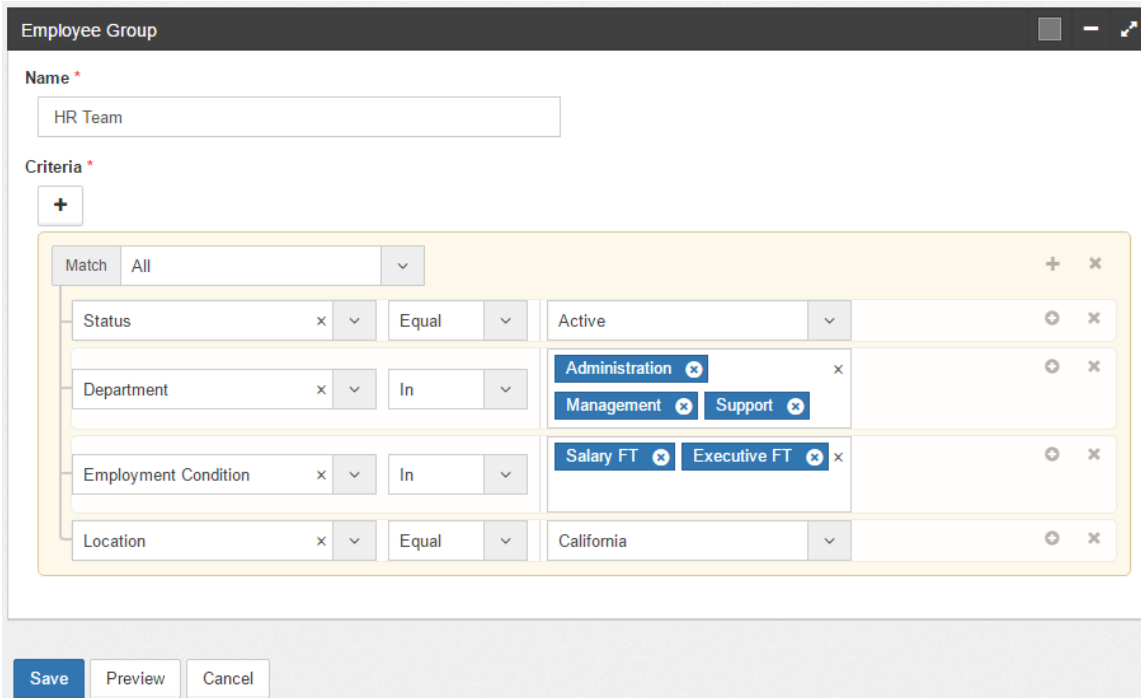
We have updated the file uploader so that it now supports 'drag and drop' functionality, as well as the standard 'choose a file'. We will eventually roll this out over all modules but to start with, you can find this new file uploader in the Leave Request area and the Employee > Document Store.



Employee Groups – Filter Capability

Where previously you had 'Static' and 'Dynamic' Employee Groups, you will now just have Employee Groups.

We have also extended out the filter capability so you can now use multiple and complex filters including the ability to "match" All or Any results, and find results Equal, Not Equal, In and Not In.



Skill Gap Position Identifier Pop Ups

In an earlier release, we developed the skill search based on position identifiers. In this release, we have fixed up the pop up position identifiers so you can “zoom in” on specific identifiers e.g. Location.

To view skill gaps based on position identifiers, go to Development > Skill Search > Search by Position Specifications tab > click on heading e.g. Location

Search by Jobs Search by Skills Search by Position Specifications								
Search by Jobs								
Accountant ✕ Chief Executive Officer ✕ Development Manager ✕ Help Desk Support ✕ Infrastructure Manager ✕								
<input type="text" value="Search"/> <input type="button" value="+ Filter"/>								
Sort by Skill Match (importance) ▾ <input type="button" value="📄"/>								
Job						Location		
						Critical	Required	Needed for Succession
						Critical	Required	Needed for Succession
Accountant								
Parks, Scott		3/4	2/5	NA	1/1	0/1	0/2	1/2
Chief Executive Officer								
Adams, Kent		16/18	7/7	NA	5/6	1/1	1/2	1/2
Development Manager								
Wakefield, David		17/18	11/11	NA	1/1	1/1	1/2	1/2
Help Desk Support								
No employees found								
Infrastructure Manager								

The skills that you have specified for that position identifier (e.g. Location - in Jobs > Locations > Specifications tab) will appear here with the skill gaps highlighted in red.


Job Skill Gap



Melbourne						
	Critical	Required			Needed for Succession	
	Non Disclosure Agreement	First Aid - Level 2	Confidential Agreement	Problem Solving	Innovation	
Bui, Xang	✗	✗	✗	✓ (Expert)	✗	
Chan, Alisa	✗	✗	✗	✓ (Expert)	✗	
Fung, Gary	✓	✗	✗	✓ (Proficient)	✗	
Tsoi, Luke	✗	✗	✗	✓ (Proficient)	✗	
Wakefield, David	✓	✗	✓	✓ (Expert)	✗	

Sydney						
	Critical	Required			Needed for Succession	
	Non Disclosure Agreement	First Aid - Level 2	Confidential Agreement	Problem Solving	Innovation	
Adams, Kent	✓	✗ (29/11/2016)	✓	✓ (Expert)	✗	
Brown, Mark	✗	✗	✗	✓ (Knowledge)	✗	
Jones, Matthew	✗	✗	✗	✓ (Knowledge)	✗	
Parks, Scott	✗	✗	✗	✓ (Proficient)	✗	

Skill Gap Excel Reports

You can now export skill gap screens as Excel files using the  button. Use multiple and complex filters to find the employees / departments / locations you want to report on and then export specified view.

You can do this in any of the Development > All Skills tabs – Search by Jobs, Search by Skills, or Search by Position Specifications

Search by Jobs Search by Skills Search by Position Specifications										
Accountant x Office Assistant x Office Manager x Sales Representative x										
Sort by Skill Match (importance) Search + Add Employee Filter										
Location x In Melbourne x Sydney x										
Accountant										
	Critical	Required				Preferred				
	Higher School Certificate	Accounting	Confidential Agreement	MYOB	Finance	Budgeting	Payroll	Organisation & Planning	Bachelor of Economics	Computing - General
Parks, Scott	✓	✓ (Proficient)	✗	✓ (Expert)	✓ (Proficient)	✗	✗	✗	✓	✓ (Aware)
Office Assistant										
	Critical	Required				Preferred				
	Higher School Certificate	Accounting	Confidential Agreement	MYOB	Finance	Budgeting	Payroll	Organisation & Planning	Bachelor of Economics	Computing - General
Jones, Matthew	✓	✗	✗	✗	✗	✗	✗	✗	✗	✓ (Proficient)

SkillSearchByJobs (1) [Compatibility Mode] - Excel										
File Home Insert Page Layout Formulas Data Review View Tell me what you want to do										
Clipboard Font Alignment Number Styles Cells Editing										
A1 Accountant										
Accountant										
	Critical	Required				Preferred				
	Higher School Certificate	Accounting	Confidentiality Agreement	MYOB	Finance					
Parks, Scott	Critical: 3/4, Required: 2/5, Preferred: 1/1	Proficient		Expert	Proficient					
Office Assistant										
	Critical	Required				Preferred				
	Higher School Certificate	Accounting	Confidentiality Agreement	MYOB	Finance					
Jones, Matthew	Critical: 1/4, Required: 0/5, Preferred: 1/1									

Calendar View in Planner

Based on your feedback, we have added a calendar view in the ToDo > Planner area.

When you first click into the Planner, you will be looking at the Summary View. Just click 'Calendar' under the filter area and your planner will change into the Calendar view.

The screenshot shows the ToDo Planner interface. At the top, there is a search bar and a filter dropdown. Below that, there is a location filter set to 'California'. The main navigation area includes tabs for 'Summary View', 'Detailed View', 'Attendance', and 'Calendar', with 'Calendar' highlighted in yellow. Below the navigation, there is a date range '23/11/2016 - 14/12/2016' and an 'Approve' button. The calendar grid for November 2016 is displayed, showing dates from 30 to 25. Events are listed for the 30th and 31st (McLaren, Sally - East Asian Business Enterprise and Webb, James - East Asian Business Enterprise) and the 16th (McLaren, Sally - Personal Leave).

Sun	Mon	Tue	Wed	Thu	Fri
30 McLaren, Sally - East Asian Business Enterprise Webb, James - East Asian Business Enterprise	31	1	2	3	4
6	7	8	9	10	11
13	14	15	16 McLaren, Sally - Personal Leave	17	18
20	21	22	23	24	25


Return to original WF search page after WF execution


We have updated this release so that when you execute an action on a workflow (e.g. Submit, Escalate, Send Back etc.), you will return to the original page you were on when you opened the workflow. An example of this would be if you went into System > Workflow Admin > All Active Workflows > Filtered for Leave Requests and opened the first workflow. Previously, if you approved it / denied it etc. you would have been taken back to the ToDo module > Workflows and then had to go back to System > Workflow Admin and start again.

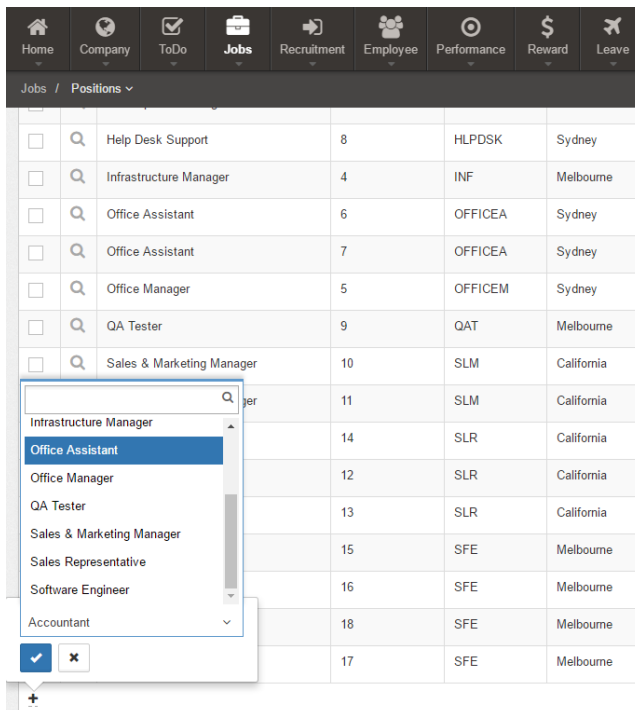
Now you will go back to your list of Filtered workflows in the System > Workflow Admin > All Active workflows area.

We hope you find this much more quick and easy now!

Add Position prompt

Previously in the Jobs > Positions area, to add a new position you had to click  and then choose a job from the drop down box at the top of the next page. This was confusing so in the

new release we have added a job drop down at the  on the positions page. Once you have chosen a job from the drop down box, you will be taken to the standard second page to input position details like Location, and position identifiers e.g. Classification, Department, Team etc.

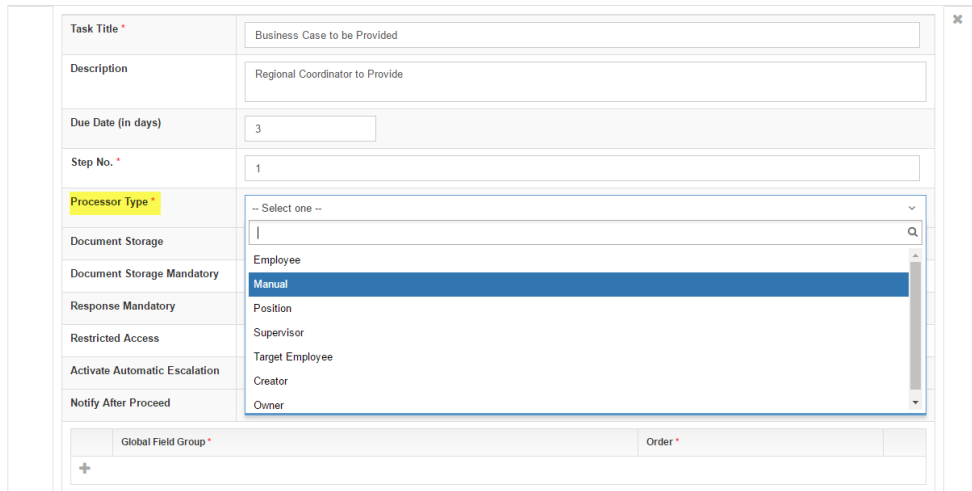


The screenshot shows the 'Jobs / Positions' page in a web application. At the top, there is a navigation bar with icons for Home, Company, ToDo, Jobs, Recruitment, Employee, Performance, Reward, and Leave. Below the navigation bar, the breadcrumb 'Jobs / Positions' is visible. The main content area displays a table of positions. A dropdown menu is open over the table, showing a search bar and a list of job titles. The 'Office Assistant' job title is selected and highlighted in blue. At the bottom of the dropdown menu, there are checkmark and 'x' icons.

<input type="checkbox"/>	<input type="text"/>				
<input type="checkbox"/>	Help Desk Support	8	HLPDSK	Sydney	
<input type="checkbox"/>	Infrastructure Manager	4	INF	Melbourne	
<input type="checkbox"/>	Office Assistant	6	OFFICEA	Sydney	
<input type="checkbox"/>	Office Assistant	7	OFFICEA	Sydney	
<input type="checkbox"/>	Office Manager	5	OFFICEM	Sydney	
<input type="checkbox"/>	QA Tester	9	QAT	Melbourne	
<input type="checkbox"/>	Sales & Marketing Manager	10	SLM	California	
<input type="checkbox"/>	Infrastructure Manager	11	SLM	California	
<input type="checkbox"/>	Office Assistant	14	SLR	California	
<input type="checkbox"/>	Office Manager	12	SLR	California	
<input type="checkbox"/>	QA Tester	13	SLR	California	
<input type="checkbox"/>	Sales & Marketing Manager	15	SFE	Melbourne	
<input type="checkbox"/>	Sales Representative	15	SFE	Melbourne	
<input type="checkbox"/>	Software Engineer	16	SFE	Melbourne	
<input type="checkbox"/>	Accountant	18	SFE	Melbourne	
<input type="checkbox"/>		17	SFE	Melbourne	

New Processor Types

We have added some new Processor Types to the Custom Workflow Template Tasks. Where previously you could choose Employee, Supervisor, Position, or Target Employee from the Employee Type drop down box, you can now also choose Creator, Owner, and Manual.



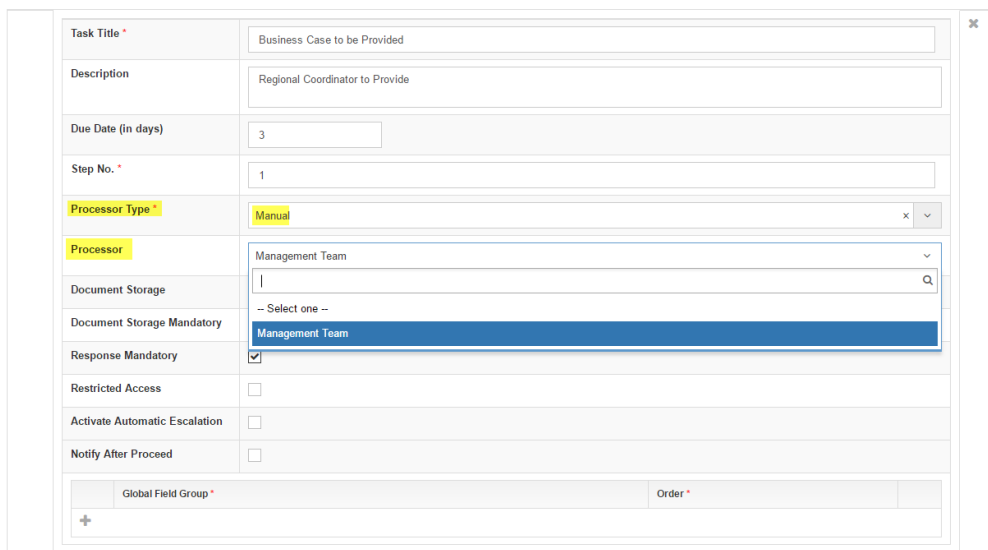
The screenshot shows a configuration form for a workflow task. The fields are as follows:

Task Title *	Business Case to be Provided
Description	Regional Coordinator to Provide
Due Date (in days)	3
Step No. *	1
Processor Type *	-- Select one --
Document Storage	
Document Storage Mandatory	Employee
Response Mandatory	Manual
Restricted Access	Position
Activate Automatic Escalation	Supervisor
Notify After Proceed	Target Employee
	Creator
	Owner

Creator is the employee who creates the workflow, they can be the Processor Type at any step (not just step 1!).

Owner is the employee who the workflow relates to (e.g. a Credit Leave Request belongs to the employee who needs a Leave Credit).

Manual means you manually input an employee / Manager etc. when you create the workflow. They will need to be part of an Employee Group. If you choose Manual as the Processor Type, you will then need to choose the Employee Group in the Processor drop down box.



The screenshot shows the same configuration form as above, but with the Processor dropdown menu open. The fields are as follows:

Task Title *	Business Case to be Provided
Description	Regional Coordinator to Provide
Due Date (in days)	3
Step No. *	1
Processor Type *	Manual
Processor	Management Team
Document Storage	
Document Storage Mandatory	-- Select one --
Response Mandatory	<input checked="" type="checkbox"/>
Restricted Access	<input type="checkbox"/>
Activate Automatic Escalation	<input type="checkbox"/>
Notify After Proceed	<input type="checkbox"/>

When submitting a custom workflow, the creator will manually be able to input the incumbent for the step with the 'manual' processor. The incumbents will be part of the specified Employee Group. E.g. in the example above, the Processor Type was Manual and the Processor was the Management Team. This means the incumbent for step 1 can be Kent Adams OR David Wakefield – both members of the Management Group.

Recruitment Approval

Reason for Workflow (Description) *

Target Employee *

Workflow Owner Selection

Workflow Owner Type Workflow Owner Incumbent *

Tasks

Stage Number	Task Title	Description	Due Date *	Resolver	Position	Incumbent
1	Business Case to be Provided	Regional Coordinator to Provide	04/12/2016	Manual		<input type="text" value="Adams, Kent"/> <ul style="list-style-type: none"> Adams, Kent Wakefield, David
2	Regional Manager Reviews	Either provides recommendation and sends or - or sends back with reason for denial	06/12/2016	Supervisor - 1st Level Supervisor		<input type="text" value="Brown, Mark"/>

* The workflow processors (employee name) listed on the right for guidance only. Depending on the processor setup (e.g. Position) some could be substituted for changes.

Check Boxes and Multi Select added to Custom Fields

In this release, we have added check boxes and multi select functionality to the Custom Fields – Response Type area.

The Checkbox is available for all fields. The multi select is only available for some fields e.g. Location (because most fields do not have more than one applicable response).

Field Group

Field Group Name *

Module

Fields

Field Name *	Comments Text Field Description	Response Type *	Mandatory	Display Order *
Meet & Greet	Completed?	Yes/No	<input checked="" type="checkbox"/>	1
Start Date	When?	Date	<input checked="" type="checkbox"/>	2
ATO Tax Withholding Declaration	Completed?	-- Select one --	<input type="checkbox"/>	

check

Checkbox

Save Back

Fields

Field Name *	Comments Text Field Description	Response Type *	Mandatory	Display Order *
Meet & Greet	Completed?	Yes/No	<input checked="" type="checkbox"/>	1
Start Date	When?	Date	<input checked="" type="checkbox"/>	2
ATO Tax Withholding Declaration	Completed?	Checkbox	<input type="checkbox"/>	3
Locations?		Locations x	<input checked="" type="checkbox"/> Multiple select	4

Save Back

Manager Checklist

Meet & Greet * - Completed?

Start Date * - When?

ATO Tax Withholding Declaration - Completed?

Locations? *

Check box

Multi-select

New Positions Listing page

We have updated the Positions Listings page (or Job Board) so it is now more simple and straightforward.

Click on the Details button for more info (if specified) including Employment Type, Open Date, and Close Date.




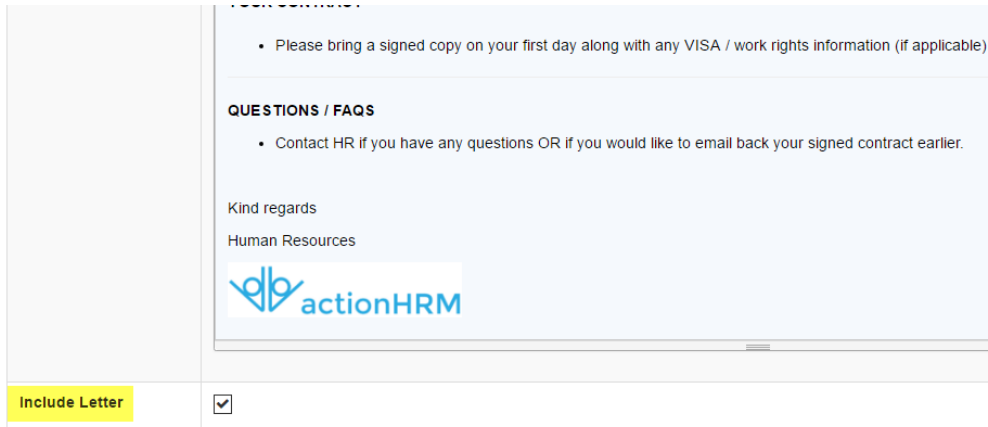
List of open positions for company **V5Demo**.

Open Positions	
<input type="text"/>	<input type="button" value="Search"/> View All
Position	Location
Accountant	
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
Accountant	Melbourne, VIC
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
Accountant	K-SWISS Bondi Junction, NSW
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
Position Name: Accountant Employment Type: Casual Location: K-SWISS Bondi Junction, NSW Open Date: 02/02/2016 Close Date:	
Engineer - Water Infrastructure	Hobart, TAS
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
Position Name: Engineer - Water Infrastructure Employment Type: Location: Hobart, TAS Open Date: 01/11/2016 Close Date:	
Environmental Consultant	Sydney, NSW
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
Environmental Consultant	Hobart, TAS
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
Environmental Consultant	Sydney, NSW
	<input type="button" value="Details"/> <input type="button" value="Apply"/>
HR Advisor	
	<input type="button" value="Details"/> <input type="button" value="Apply"/>

Recruitment Notification changes

One of the biggest changes in this release is in the Recruitment > Notifications area. We have added the ability to send applicants Custom Letters and Word Exports.

To set up letters, go to Recruitment > Admin > Notification Templates > click  to open a Notification type e.g. 'Hired' > under the Notification Template Details heading, check box beside 'Customisable' (if you want to be able to customise for individual applicants) > check box beside 'Include Letter' (under email body).




• Please bring a signed copy on your first day along with any VISA / work rights information (if applicable)

QUESTIONS / FAQs

• Contact HR if you have any questions OR if you would like to email back your signed contract earlier.

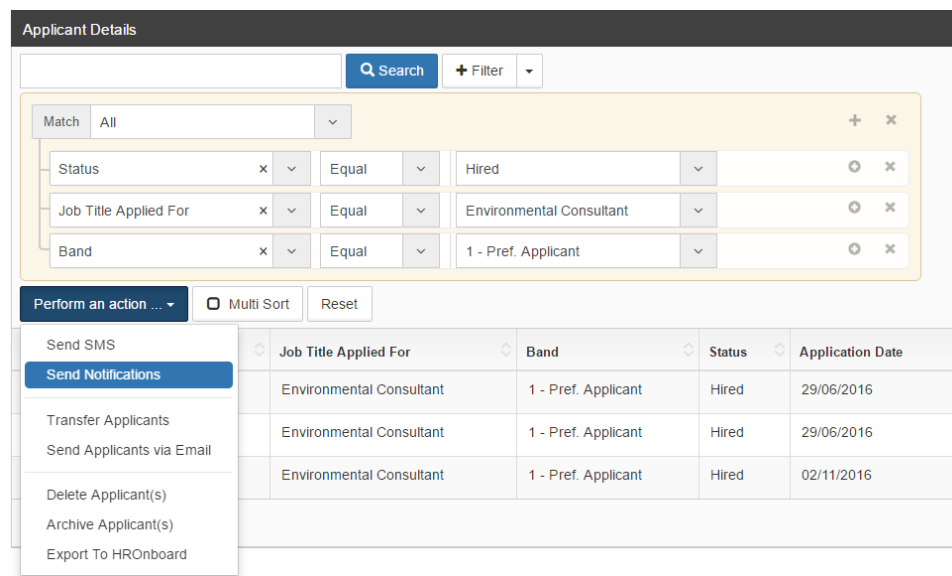
Kind regards
Human Resources



Include Letter

Letter details will then appear below. These now include Letter Format, Header, Title, Text / Body, Signature Block and Footer.

Once your letter has been set up, you will be able to send it to applicants in the Recruitment > Applicant area by checking boxes beside applicants > clicking on Perform an Action > Send Notifications



Applicant Details

Search Filter

Match All

Status x Equal Hired

Job Title Applied For x Equal Environmental Consultant







Band x Equal 1 - Pref. Applicant

Perform an action ... Multi Sort Reset

Job Title Applied For	Band	Status	Application Date
Environmental Consultant	1 - Pref. Applicant	Hired	29/06/2016
Environmental Consultant	1 - Pref. Applicant	Hired	29/06/2016
Environmental Consultant	1 - Pref. Applicant	Hired	02/11/2016

Send SMS
Send Notifications
Transfer Applicants
Send Applicants via Email
Delete Applicant(s)
Archive Applicant(s)
Export To HROnboard

You can then choose a Notification Template (from drop down box), a Notification Type (email or PDF), Preview, Export to RFT ('Rich Text Format' / Word Doc), and Continue (send notifications).

Name	Status	Notification Template	Notification Type	Comment
McBean, Kasey	Hired	Hired!	 	<input type="text"/>
McManus, Emily	Hired	Hired!	 	<input type="text"/>
Thomas, Levi	Hired	Hired!	 	<input type="text"/>

Notifications (1).rtf [Compatibility Mode] - Word

File Home Insert Design Layout References Mailings Review View Tell me what you want to do

Read Mode Print Layout Views Show Zoom 100% One Page Multiple Pages New Window Arrange All Split Synchronous Scrolling Reset Window Position Switch Windows Macros

actionhrm

CONFIDENTIAL 16/11/2016

Craig Davidson
98 O'Connell Street
San Francisco California 90541

Employment Contract and Offer for Sales Representative

Craig Davidson
98 O'Connell Street,
San Francisco, California, 90541

Dear Craig,

I am pleased to offer you employment initially in the position of permanent Sales Representative. Your employment contract commencement date will be, if this is not suitable please let us know.

Please find attached a copy of the employment agreement for this position. If you decide to accept our offer, the terms and conditions of your employment will be in accordance with those outlined in this agreement as well as any workplace policies that the company may issue from time to time. You may keep the other copy for your records.

On behalf of ActionHRM I welcome you to the company. We look forward to you joining our team.

Yours sincerely,
Adam Kelly
CEO

ANNEXURE A - EMPLOYMENT AGREEMENT

In the paragraphs that follow:

- all money amounts are in AUD\$, and
- "The Company" is ActionHRM Pty Limited and includes, where the context permits, a reference to any related body corporate of the Company.

1. **Appointment**

This position is Sales Representative, and is on a permanent employment basis.

However initially you will be on a probationary period so that we can assess your work and how you fit into our team. At the end of this period your performance will be reviewed and if you have reached a satisfactory level of performance as judged by your superior your position will be made permanent and salary will be reviewed.

2. **Reporting Lines**

To begin with, you will report directly to Adam Kelly, General Manager, on development issues but all other matters will be reported to your direct supervisor. You will report to the General Manager of the Company. Should this change over time, the Company will advise you of the change.

3. **Duties**

Your responsibilities as Sales Representative will be:

- as outlined by your Manager verbally and in writing,
- you will agree to set performance goals agreed jointly with your Manager
- you agree to report on these tasks at times outlined by your Manager
- as otherwise directed by the Company Management from time to time.

Our employees are expected to have a happy and flexible approach to their work duties and deal fairly with our customers. As the Company grows and its business changes over time, your duties may also change.

4. **Hours of Work**

The Company's standard office hours are between 8:30am and 5:30pm, Monday to Friday or 37.5 hours per week.

Your specific hours of work will be determined by your manager in consultation with you and may change from time to time, according to the needs of your role. However, you may be required to work additional hours (including weekends and Public Holidays) should you not manage to meet a mutually agreed minimum standard of proficiency or mutually agreed work deadlines during

standard office hours in your role as Sales Representative. You will not receive any additional payment for additional hours unless prior agreement was reached.

Please note that your position may require travel, as required by the Company from time to time. During your period as Sales Representative, you will be required (unless absent on leave) to devote the whole of your working hours and attention to the business of the Company or otherwise as directed.

If you would like to perform additional paid work other than for the Company, you should first have the second job shared by your manager.

A failure to abide by this requirement or any if any contractual work or if calls are taken during ActionHRM working hours then this may lead to disciplinary action against you.

You also agree not to accept any payment or reward for performing or not performing any act in connection with, any matter or business transacted by or on behalf of the Company.

5. **Remuneration**

Your remuneration during Probation will be based on annual rate of \$XX,XX including superannuation. You will be reviewed after 3 months and if your performance is deemed satisfactory then your probation will be given a permanent position.

As indicated above, as part of your compensation package the Company will make employer superannuation contributions on your behalf in accordance with Federal Legislation (currently 9.25%)

Your salary/wage will be paid monthly in arrears by direct deposit into your nominated bank account - unless agreed otherwise.

6. **Expenses**

With prior agreement from the company and on the provision of all relevant documentation reasonably required by the Company, the Company will reimburse you for all reasonable travelling, accommodation and associated expenses incurred by you in the performance of your duties

8. **Confidential Information, Inventions etc.**

By accepting employment with the Company, you agree that:

(a) the property of the Company includes all information (including trade and business secrets) that relates to the affairs or business of the Company, other than information already in the public domain or which is required by law to be disclosed, which comes into your possession (by you, yourself, or by means of your employment with the Company ("Confidential Information").

(b) the Confidential Information has been and will continue to be acquired by the Company at the Company's initiative and expense, and

(c) the Company has spent and will continue to spend effort and money in establishing and maintaining the Confidential Information.

Accordingly, you agree that it is reasonable for you to accept the following requirements of employment with the Company:

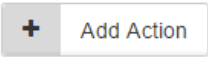
(a) you will not, during your employment with the Company, except as is authorized in the proper course of your employment, or as required by law, use, or disclose to any person, any Confidential Information, nor will you retain or use any documents or material (whether paper,

(Sample RTF)


New ToDo - Actions

Another big change in this release is the ToDo > Actions capability. This can be used for sending out basic tasks, news and messages, checklists, or policy updates for individual employees or groups of employees to review / complete and sign off on.

We are still making some changes to this function (like to the labeling – Employee to ‘Required By’ and Target Employee to ‘Employee/s to Action’), but the basic function will remain the same i.e. to send out / “burst”, actions to employees.

To add an action, go to ToDo > Actions > click  (bottom of page).

Add Action ×

Target Date *
 

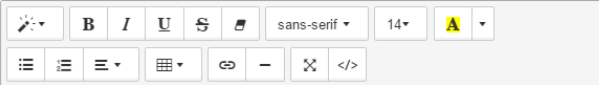
Employee *

Target Employee
 ×

Title *

Action *

Content *




Employees at [ActionHRM](#) must access a variety of IT resources, including computers and other hardware devices, data storage systems, and other accounts. Passwords are a key part of IT's strategy to make sure only authorized people can access those resources and data.

All employees who have access to any of those resources are responsible for choosing strong passwords and protecting their log-in information from unauthorized people.

- All passwords must be changed regularly, with the frequency varying based on the sensitivity of the account in question. This requirement will be enforced using software when possible.
- If the security of a password is in doubt— for example, if it appears that an unauthorized person has logged in to the account — the password must be changed immediately.
- Default passwords — such as those created for new employees when they start or those that protect new systems when they're initially set up — must be changed as quickly as possible.

Description

Attachments



Choose a file or drag it here.
Size Limit: 3.0 MiB

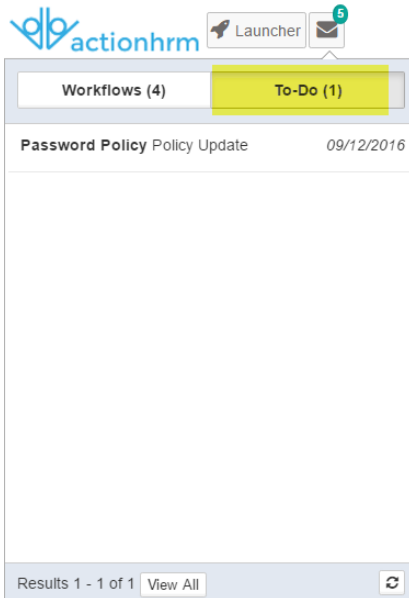
Comments



You will need to input a Target Date, a 'Required by' employee, and Target Employees / Employees to Action, a Title, an Action Type e.g. Policy Update (these can be set up in ToDo > Admin > Action Type), and some content.

You can also choose to add a description, attachments, and comments.

Once you have added an action, it will appear in the 'Employees to Action' ToDo list (beside Workflows)



The screenshot shows the ActionHRM interface. At the top left is the 'db actionhrm' logo. To its right is a 'Launcher' button with a mail icon and a notification badge showing '5'. Below these are two tabs: 'Workflows (4)' and 'To-Do (1)'. The 'To-Do (1)' tab is selected and highlighted in yellow. Below the tabs, a list item is displayed: 'Password Policy Policy Update' with a date of '09/12/2016'. At the bottom of the interface, there is a footer bar containing 'Results 1 - 1 of 1', a 'View All' button, and a refresh icon.

The Employees to Action will be able to open it up from here, review content, and sign off - check box beside "I confirm that I have read the content".

Password Policy Update December 2015 x

passwords/phrases that are long, strong, and complex. Where possible, Staff should choose passwords/phrases that meet the following requirements:

- Contain both upper and lower case characters (e.g., a-z, A-Z).
- Include both numbers (0-9) and special characters (e.g. @, #, \$, *).
- Have a minimum of at least 10 characters and preferably 15 characters long and is a phrase.
- Where possible, use different passwords/phrases for general office activities (e.g. e-mail, file access) vs. systems that store sensitive or confidential data.

Staff should not choose passwords/phrases that:

- Include common words such as those found in a dictionary.
- Are the same as passwords/phrases used on Staff personal accounts (e.g. personal e-mail, on-line banking, or social media).
- Contain personal information such as a spouse or pet's name, social security number, driver's license number, street address, phone number, etc.
- Contain sequences or repeated characters. For example, 1234, 3333, etc.

Staff with special system privileges, assigned by a transaction, program, process, or group membership, should select a unique password/phrase from other accounts held by that individual.

I confirm that I have read the content.

We will be doing a couple of small updates this week so the function is available as soon as possible. In the next release we will also be looking to extend the filter capability in this area so that you can use filters to search for specific / groups of employees based on Location, Employment Type etc.