5.25 Release Notes

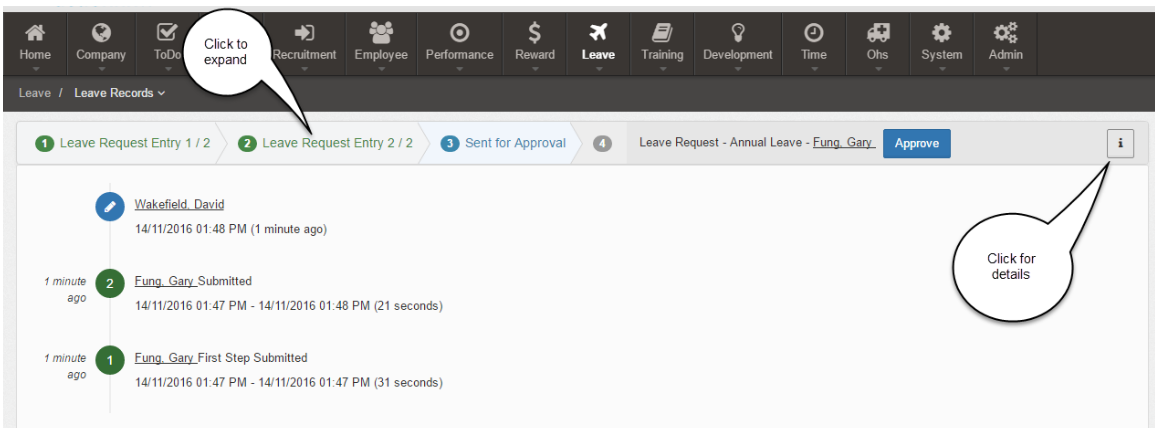
New Features - Overview

- 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

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

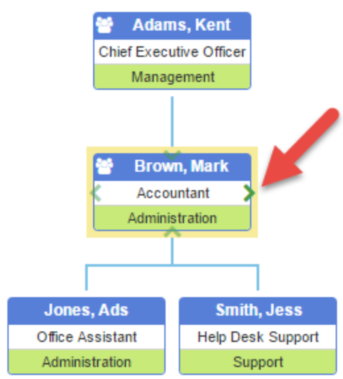
We have improved the functionality of the Org Chart. You will now be able to zoom in and expand (using the arrows) to see relationships.

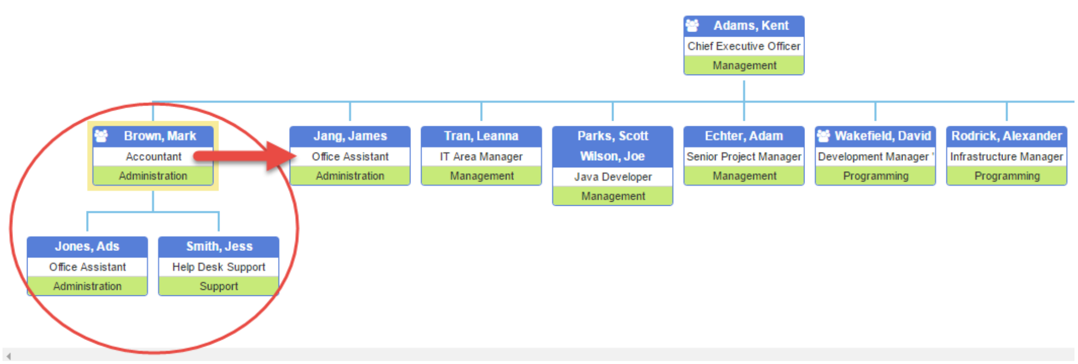
We have added a box at the bottom of the page containing a list employees with no Reports to Linkage.

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.





Positions without Reports To linkage

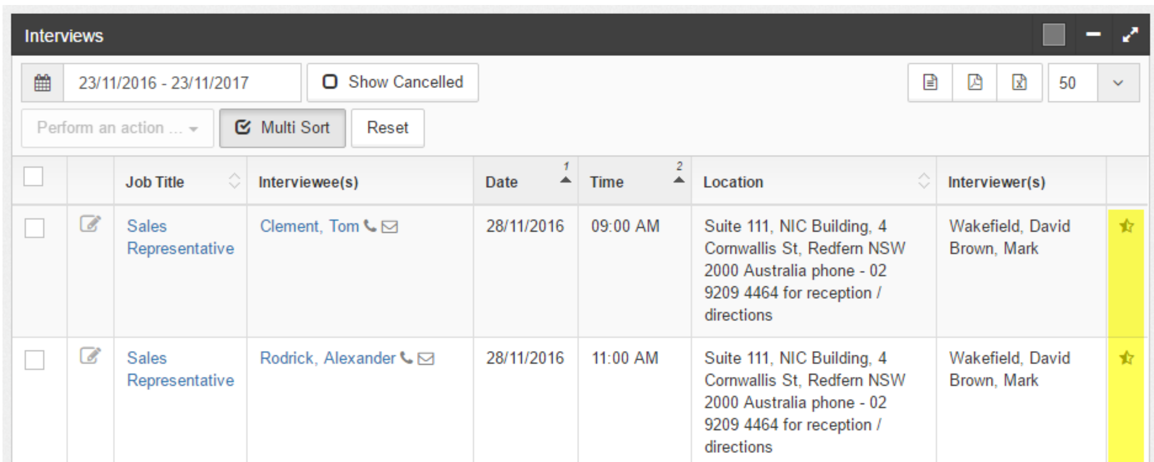
Job Title	Department	Incumbent
ActionHRM Specialist	QA & Testing	Kelly, Adam
Office Assistant	Management	Ulshafer, Courtney
Sales Representative	Sales	McLaren, Sally

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.

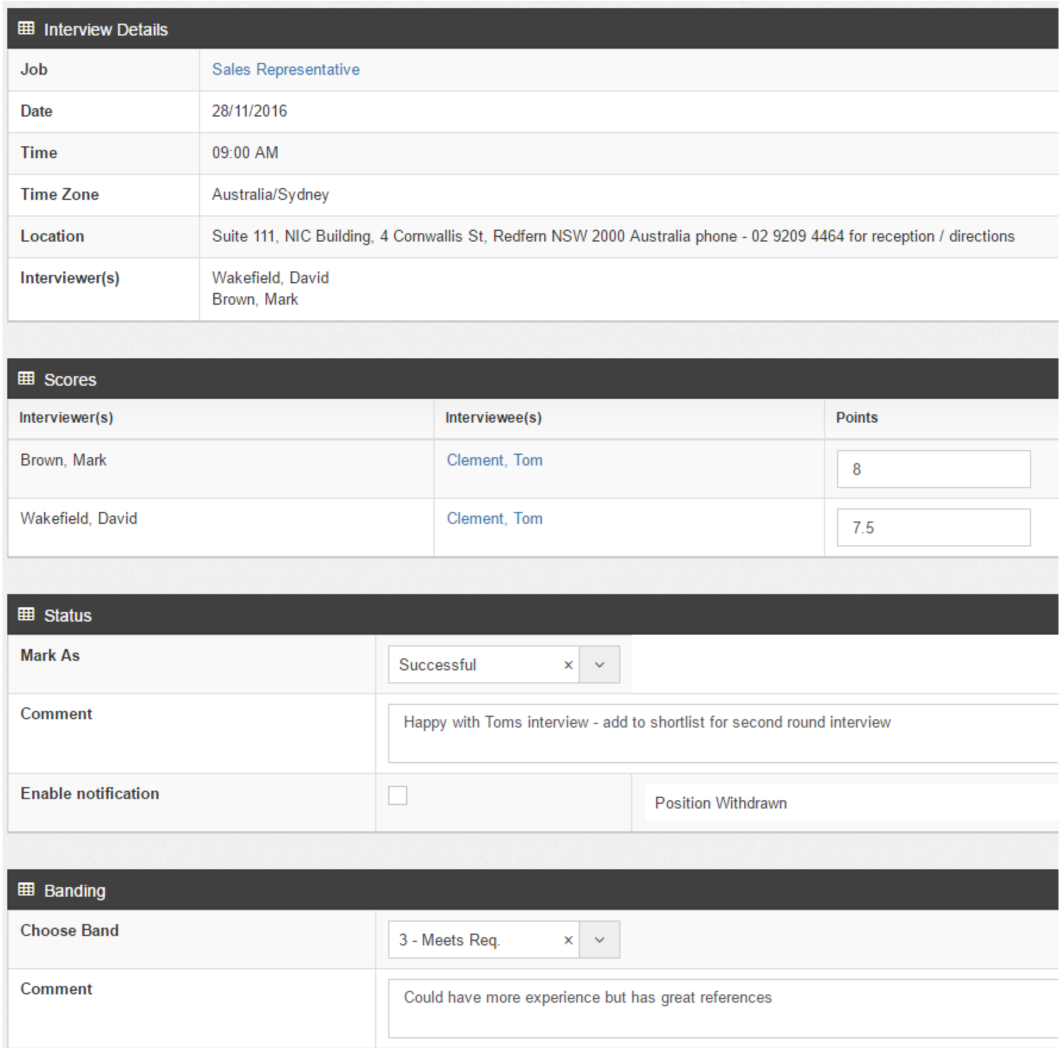
Once you have scheduled interviews (by opening applicant's details and clicking Perform an Action > Schedule Interview), you will now be able to add a score for each Interviewer. To do this, go to Recruitment > Interview Management > click on the (on the right-hand side of Interview details)



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).



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 | 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

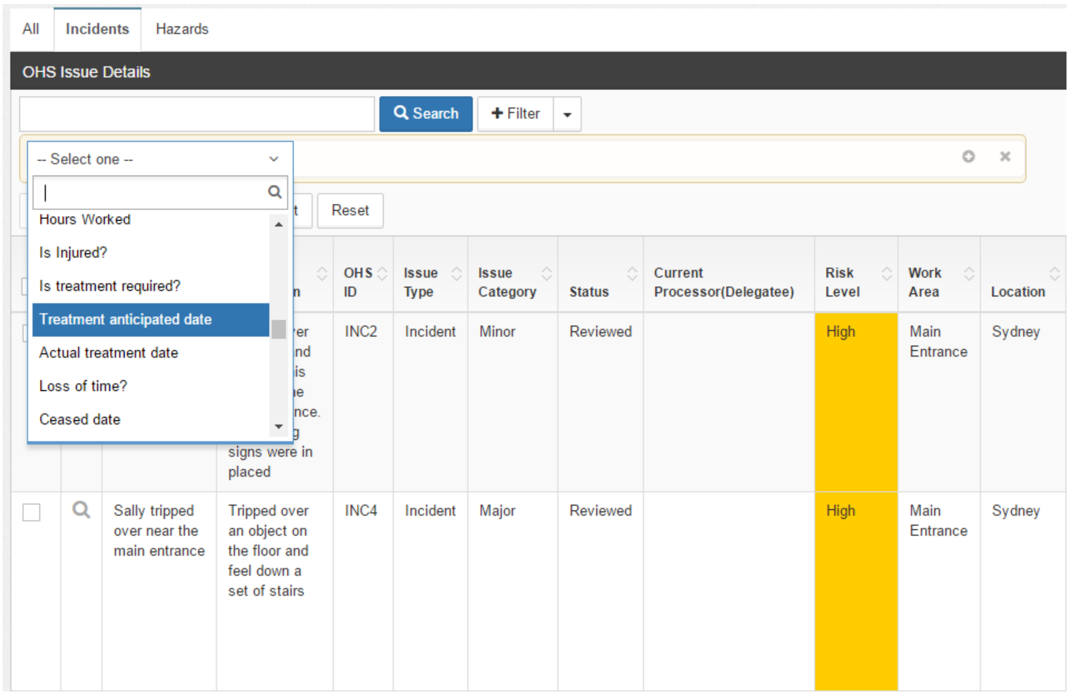
You can also click to see more details, i.e. exactly which days / hours in the record are paid / processed and which will be in the next pay period.

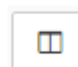
Mon 28/11/2016	*(worked day)*	7.50	7.50	0.00	1.00	1.00	0.00	Processed
Tue 29/11/2016	*(worked day)*	7.50	7.50	0.00	1.00	1.00	0.00	Processed
Wed 30/11/2016	*(worked day)*	7.50	7.50	0.00	1.00	1.00	0.00	Processed
Thu 01/12/2016	*(worked day)*	7.50	7.50	0.00	1.00	1.00	0.00	N/A
Fri 02/12/2016	*(worked day)*	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	

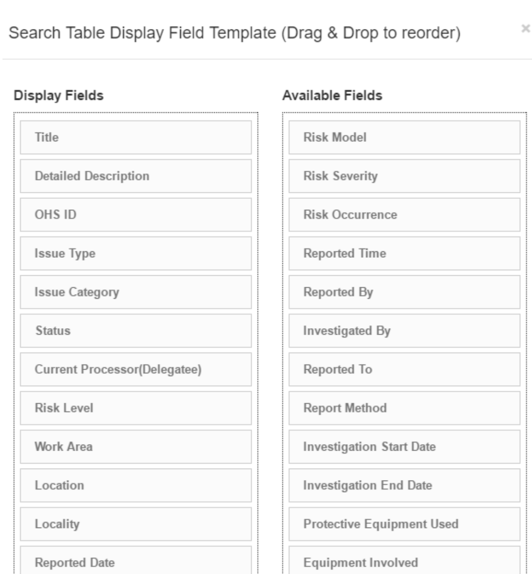
Submitted Hours	172.5
Processed Hours	120
Approved By	Adams, Kent
Approved Date	01/11/2016
Additional Note	

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.

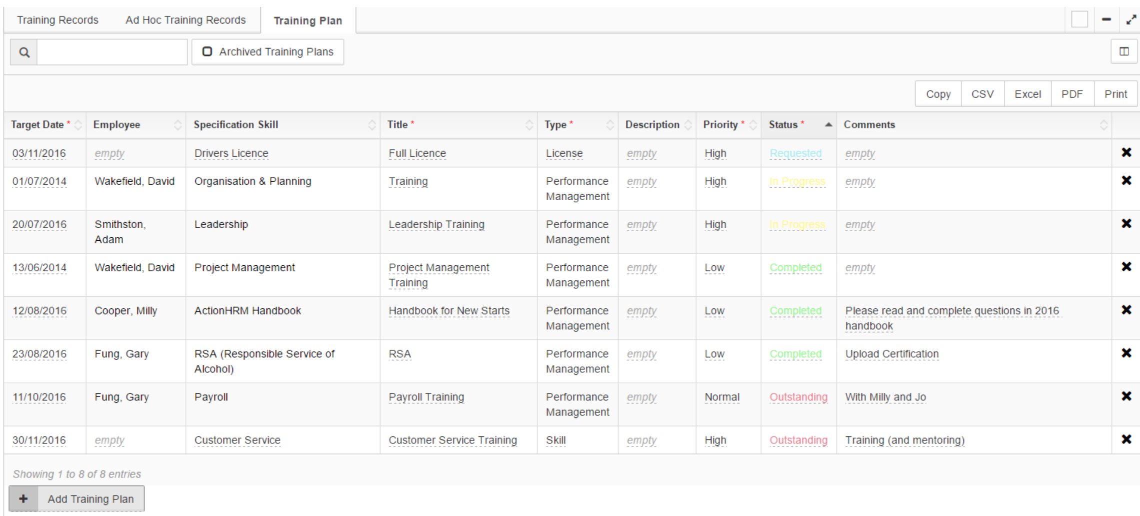


More searchable fields mean you also have more displayable fields. Use the  button (top right corner) to adjust display fields or save default display fields.



Training Plan

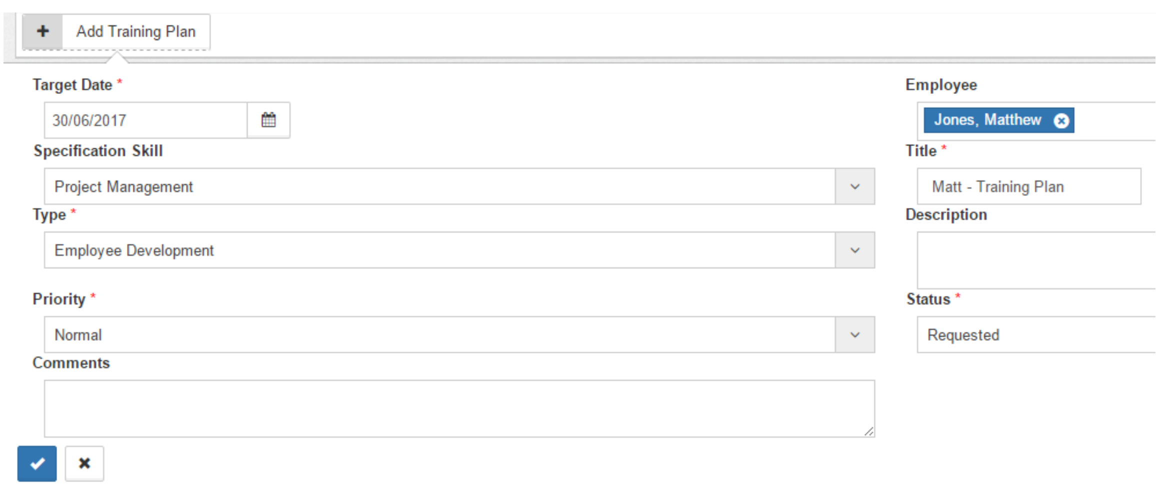
In the last release, we incorporated a Training Plan in the Development > Training Records area. Ultimately, we want this to link to Training > Courses, and Development > All Skills, but in this release, we have made the training plan employee specific.



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)

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.

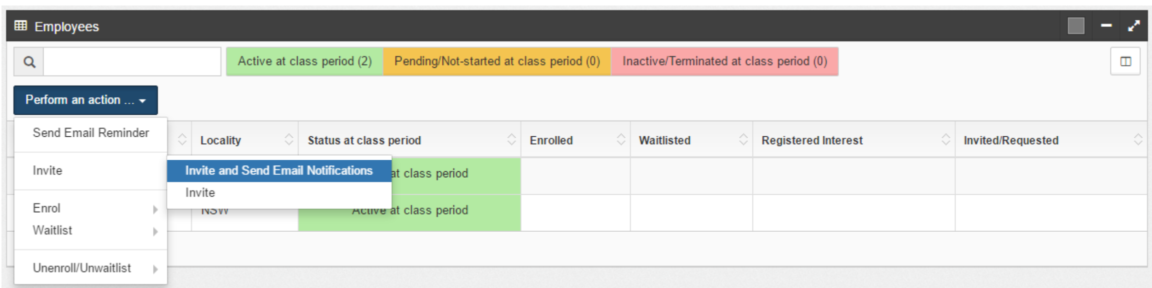


Training plan *type*, *priority*, and *status*, can be set up under Development > Admin

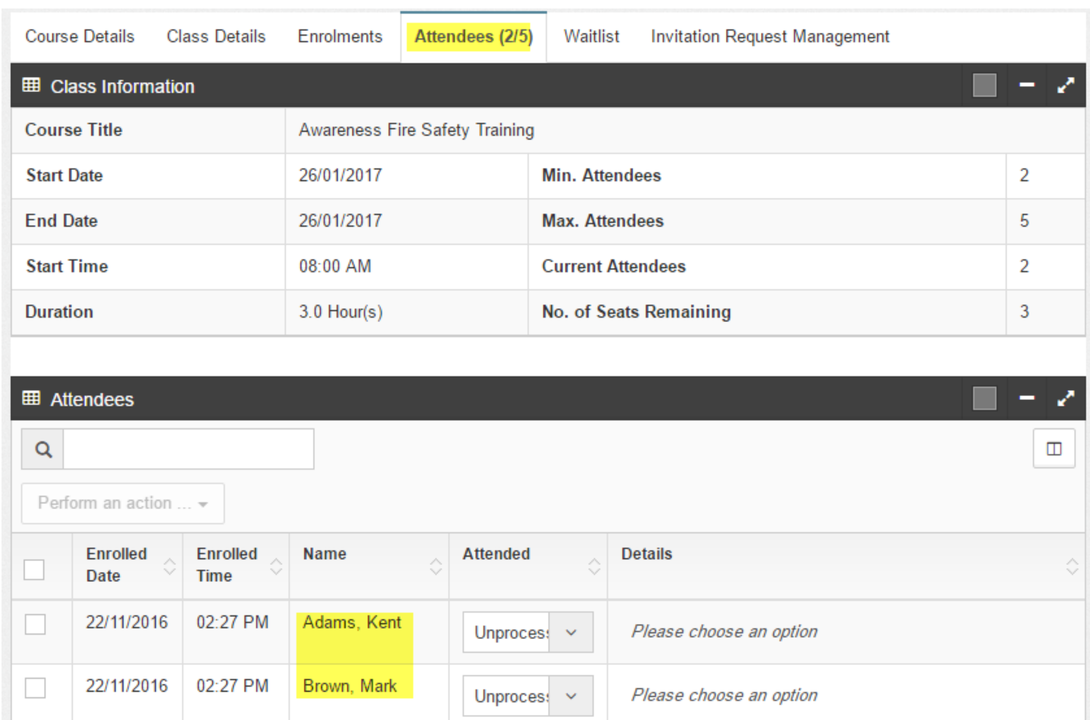
Training – Invitation Request Management

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.

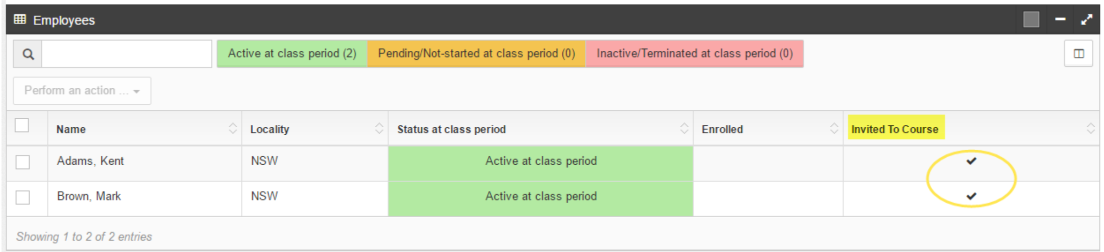
You will now be able to check box beside employees names, click 'Perform an Action', and send reminders, custom emails (change of locations / cancellations etc), invite, enroll, or waitlist employees (with notifications).

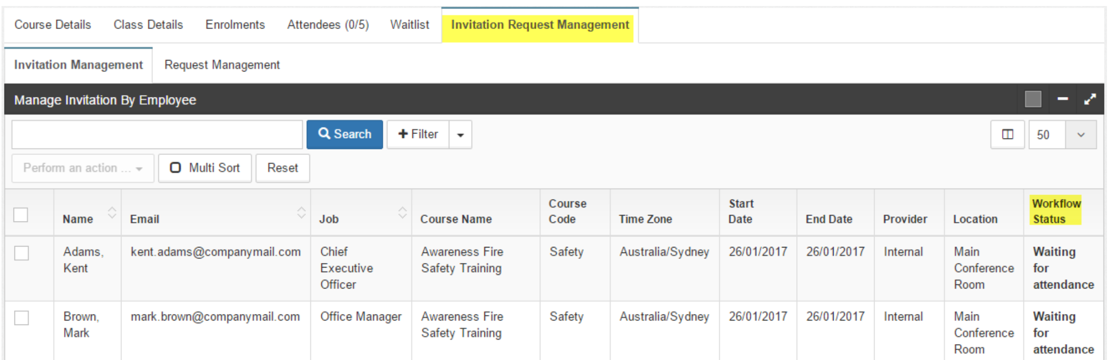


Once employees have been *enrolled*, they will automatically appear under the Attendees tab.

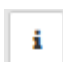


If you *invite* employees, they will get a tick in the 'Invited to Course' box, and they will appear in the NEW Invitation Request Management tab – Invitation Management. In this tab, you will be able to see their status as "Waiting for attendance"

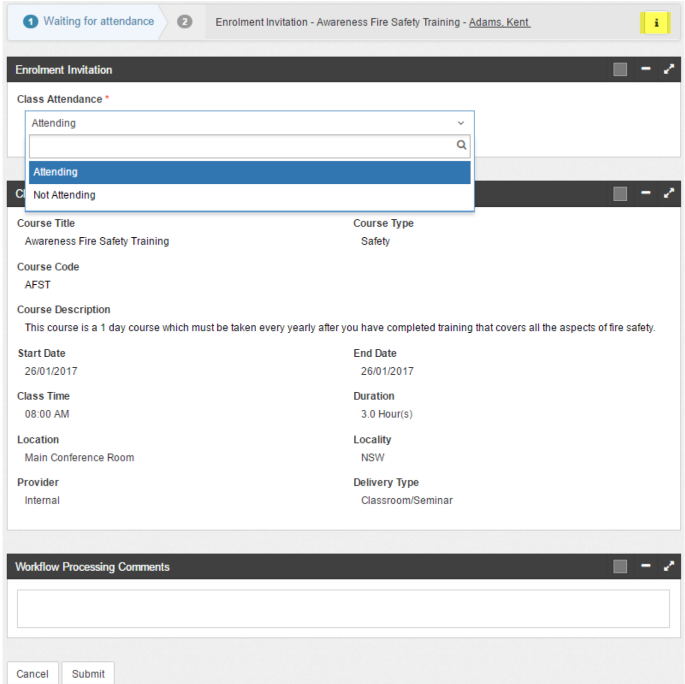




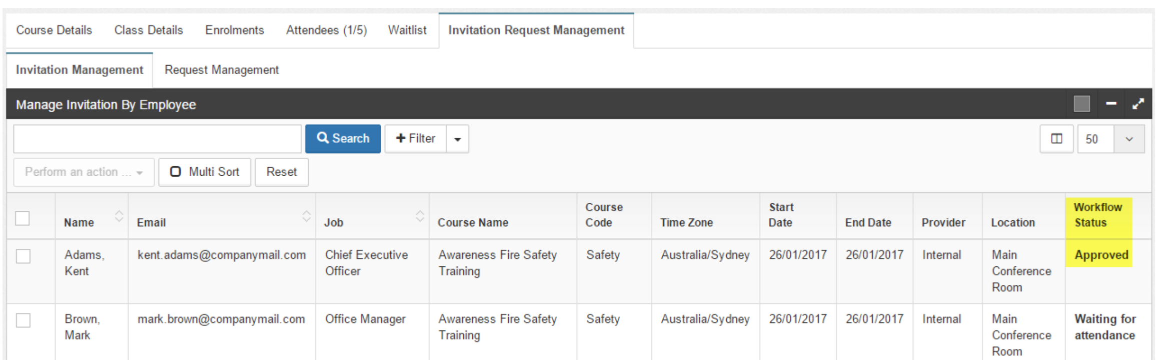
The invited employees will receive a workflow and will be able to specify their class attendance and input any comments.

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.

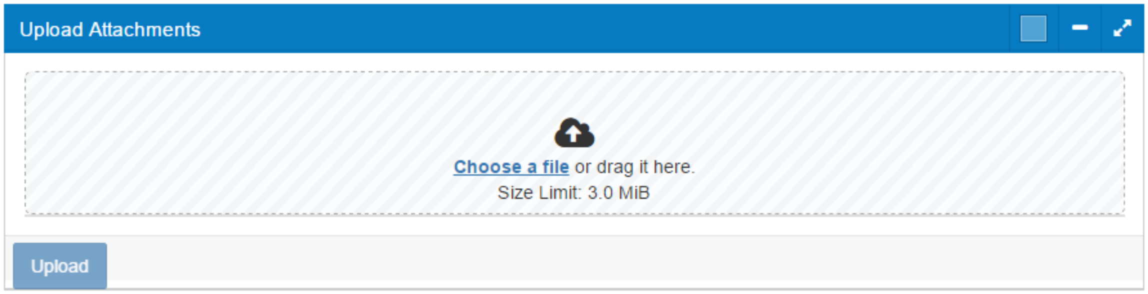


The reason we created this new Invitation Request Management tab is so that Training Administrators can quickly complete or cancel requests in the one area.

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

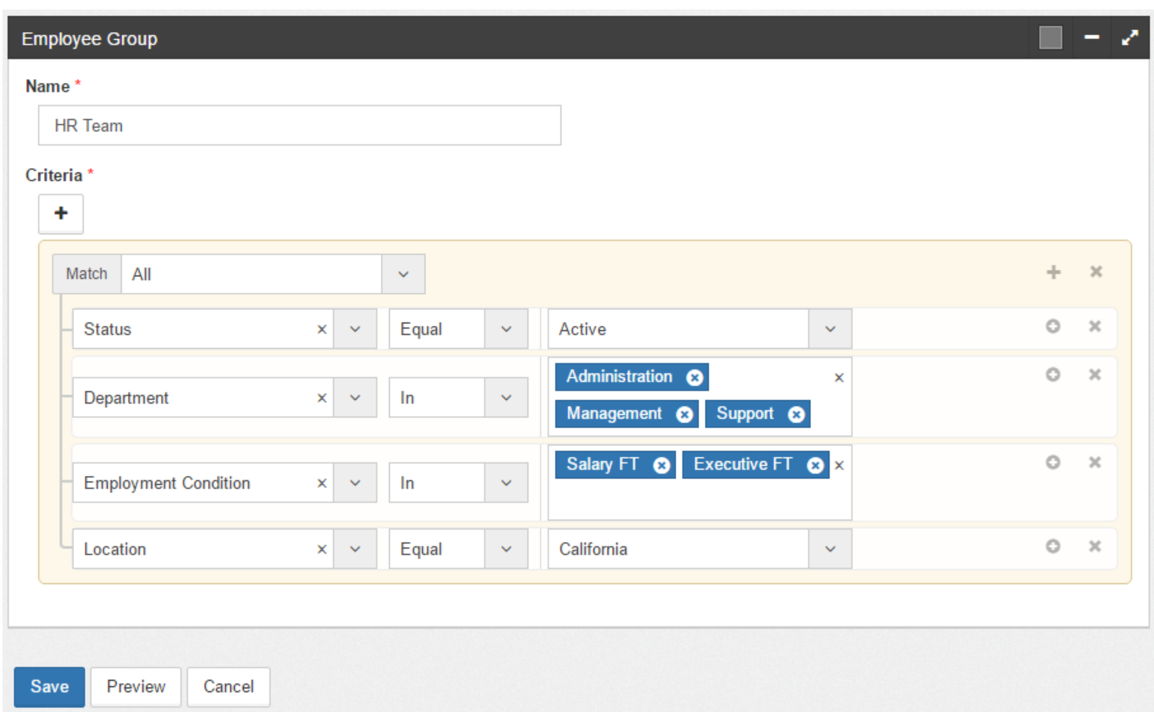
We have updated the file uploader so that it now supports ‘drag and drop’ functionality, as well as the standard ‘choose a file’. We will eventually role this out over all modules but to start with, you can find this new file uploader in the Leave Request area and the Employee > Document Store.



Employee Groups – Filter Capability

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

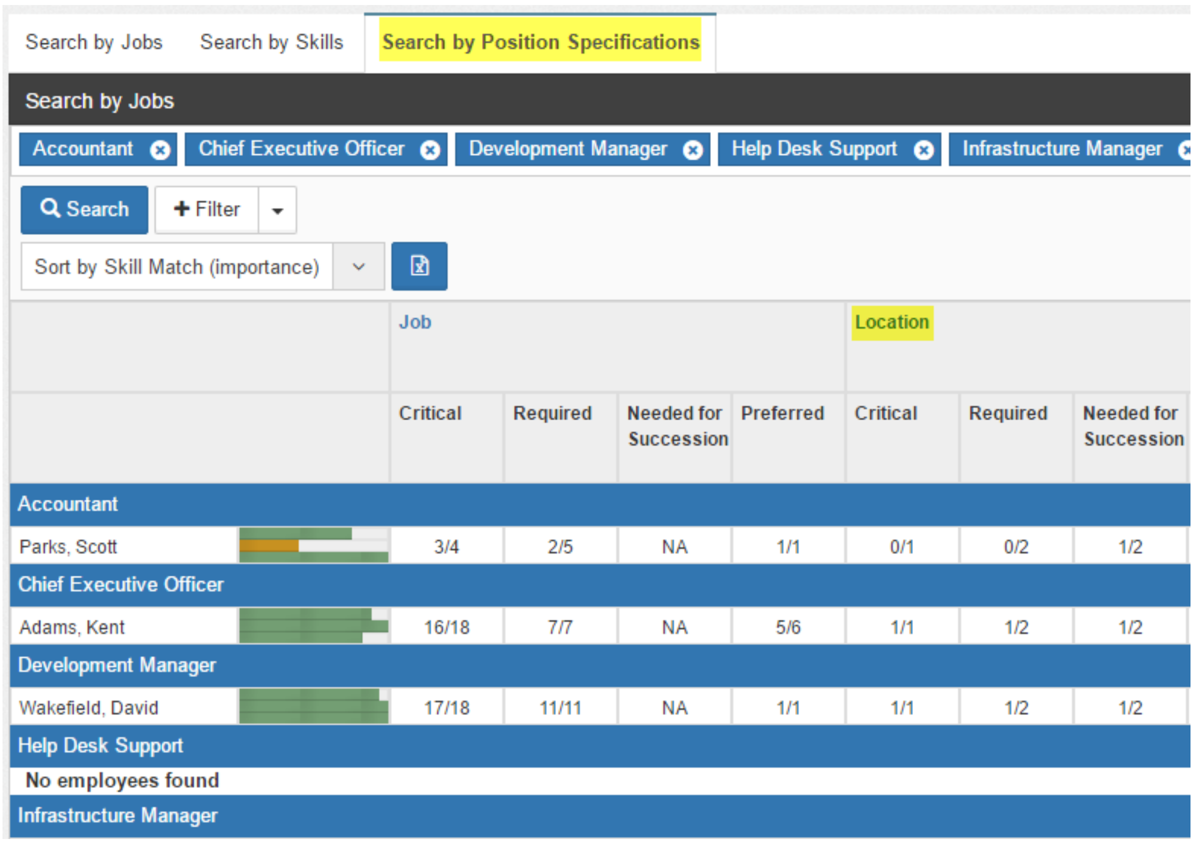
We have also extended out the filter capability so you can now use multiple and complex filters including the ability to “match” All or Any results, and find results Equal, Not Equal, In and Not In.



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



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)	✖

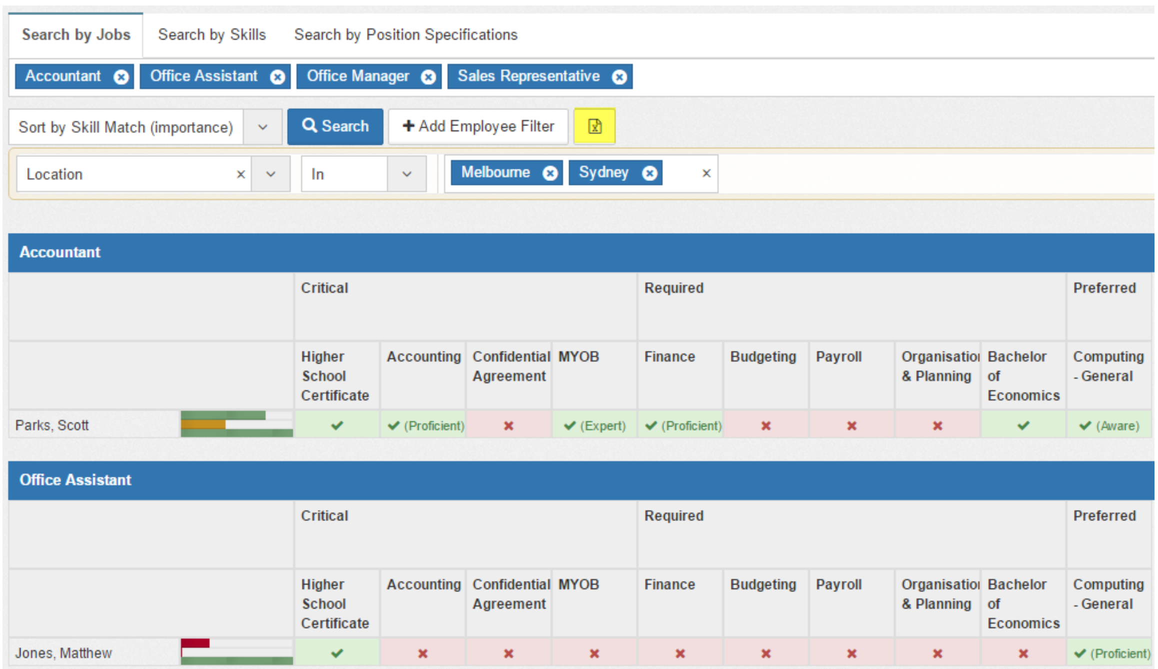
Sydney

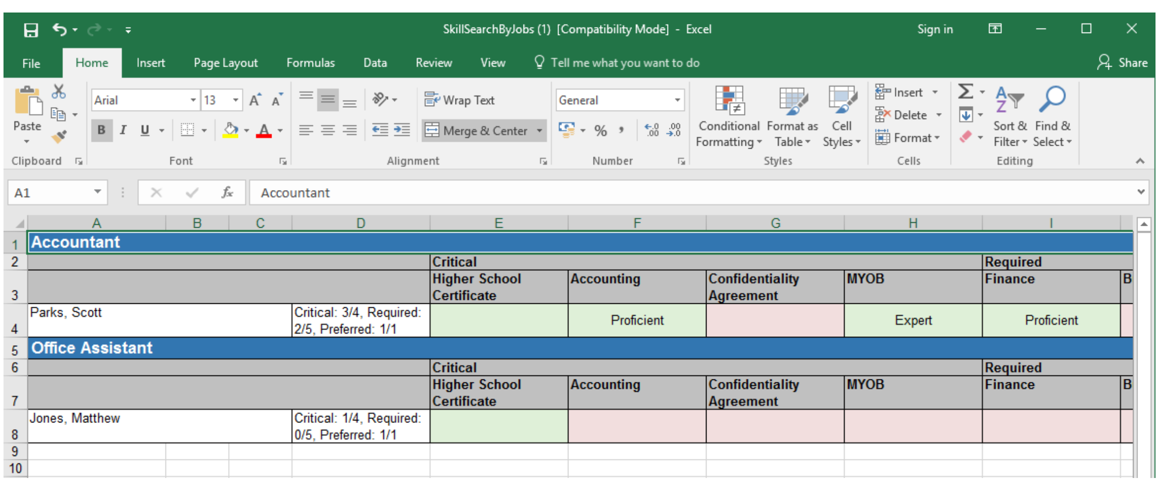
		Critical	Required		Needed for Succession	
		Non Disclosure Agreement	First Aid - Level 2	Confidential Agreement	Problem Solving	Innovation
Adams, Kent		✔	✖ (29/11/2016	✔	✔ (Expert)	✖
Brown, Mark		✖	✖	✖	✔ (Knowledg	✖
Jones, Matthew		✖	✖	✖	✔ (Knowledg	✖
Parks, Scott		✖	✖	✖	✔ (Proficient)	✖

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

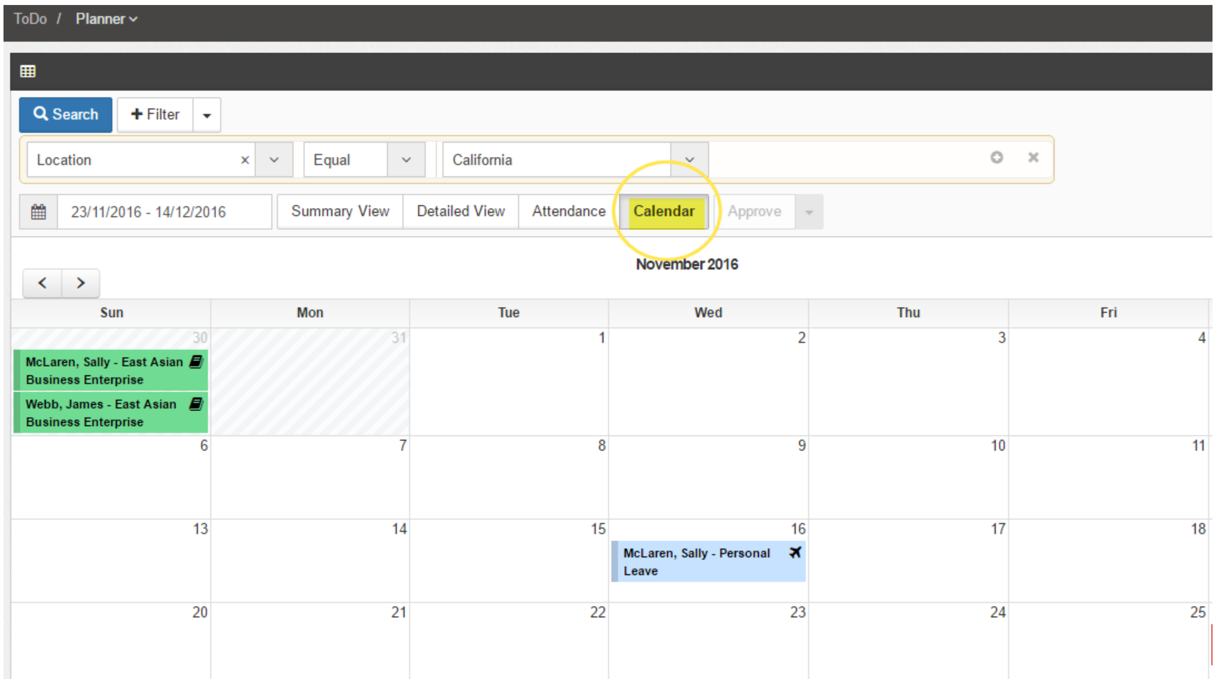




Calendar View in Planner

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.



Return to original WF search page after WF execution

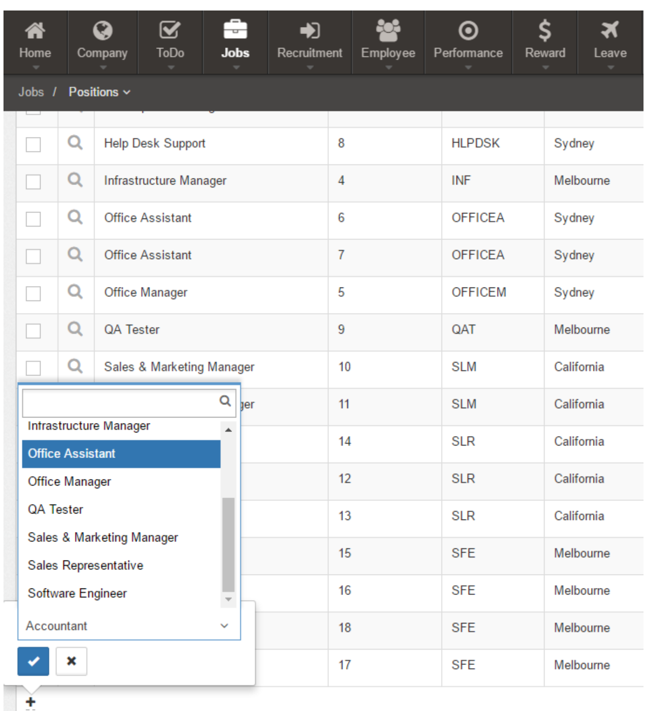
We have updated this release so that when you execute an action on a workflow (e.g. Submit, Escalate, Send Back etc.), you will return to the original page you were on when you opened the workflow. An example of this would be if you went into System > Workflow Admin > All Active Workflows > Filtered 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!

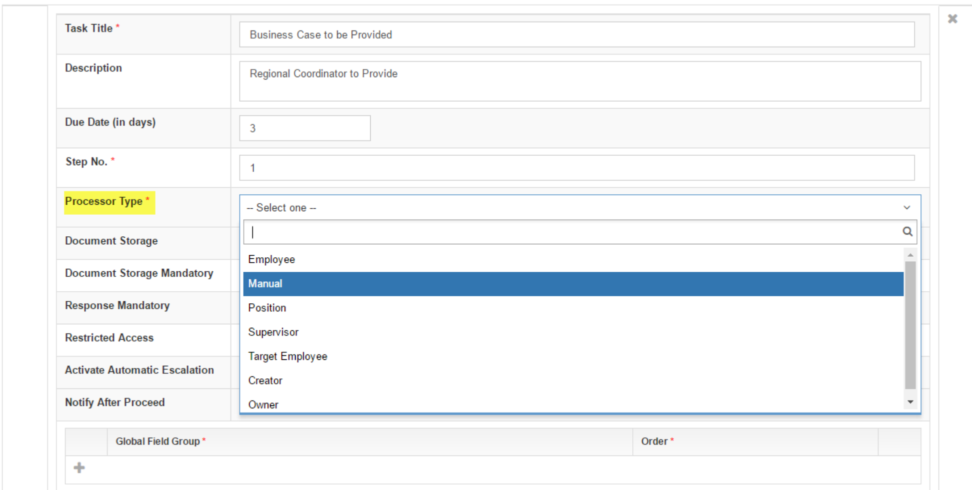
Add Position prompt

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.



New Processor Types

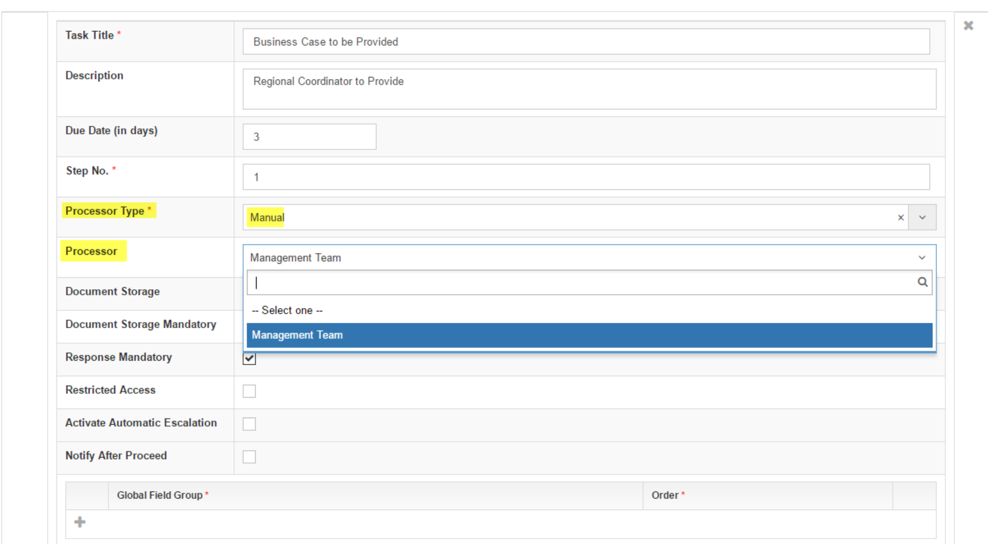
We have added some new Processor Types to the Custom Workflow Template Tasks. Where previously you could choose Employee, Supervisor, Position, or Target Employee from the Employee Type drop down box, you can now also choose Creator, Owner, and Manual.



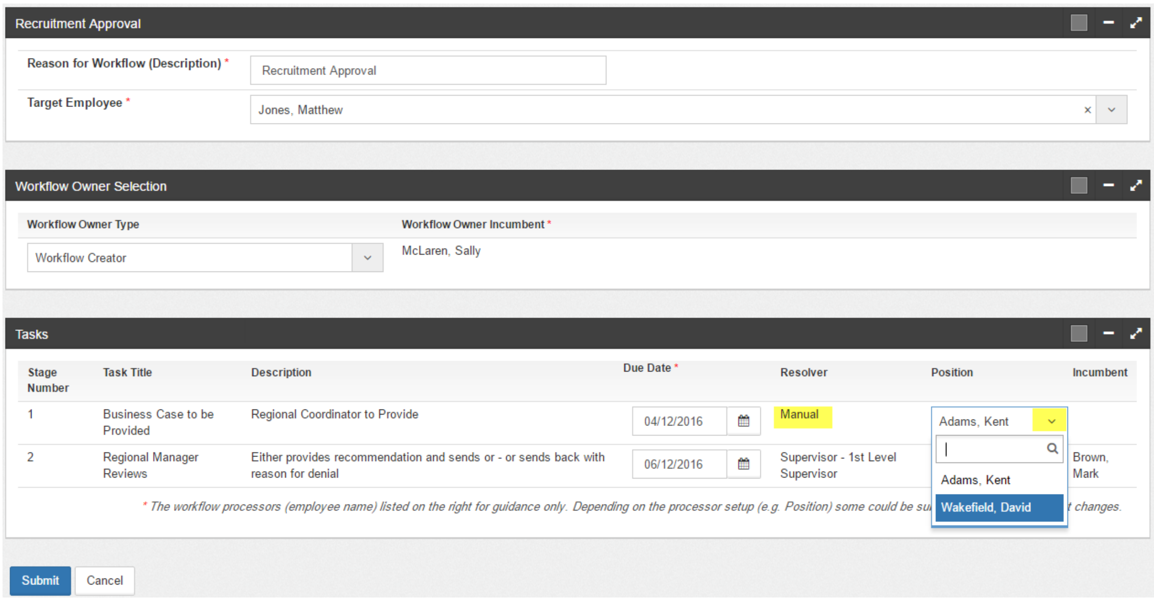
Creator is the employee who creates the workflow, they can be the Processor Type at any step (not just step 1!).

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.



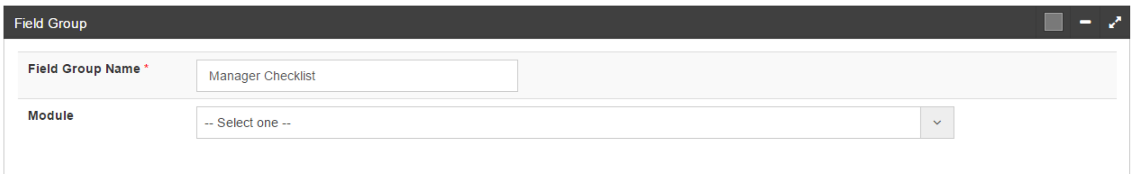
When submitting a custom workflow, the creator will manually be able to input the incumbent for the step with the ‘manual’ processor. The incumbents will be part of the specified Employee Group. E.g. in the example above, the Processor Type was Manual and the Processor was the Management Team. This means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

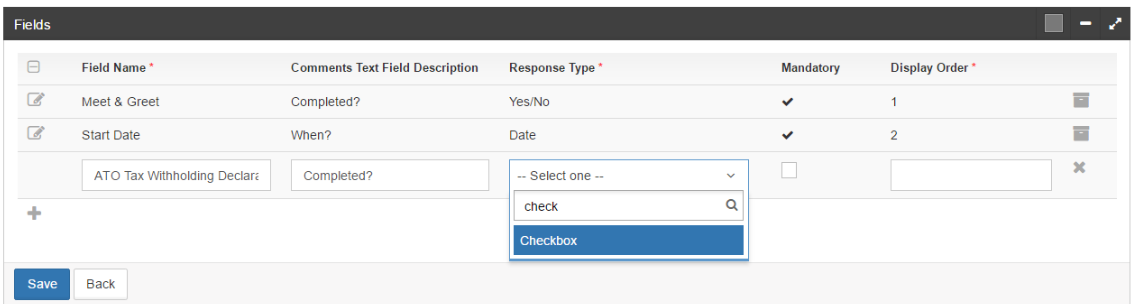


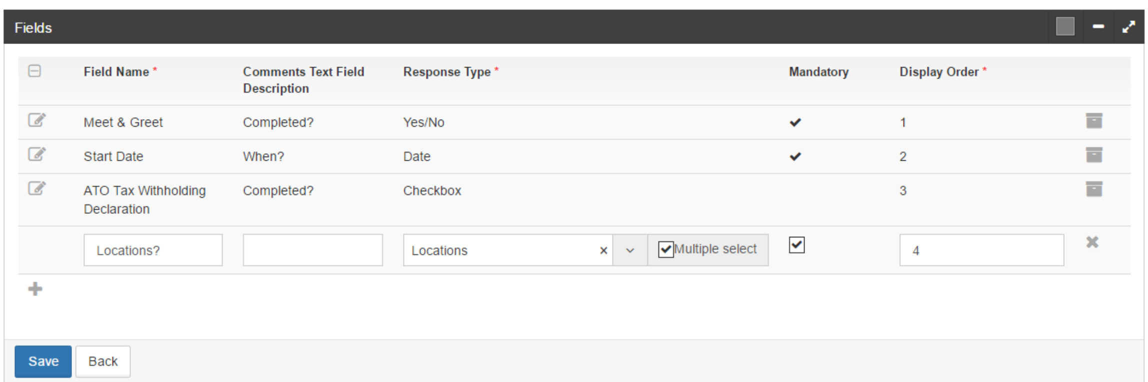
Check Boxes and Multi Select added to Custom Fields

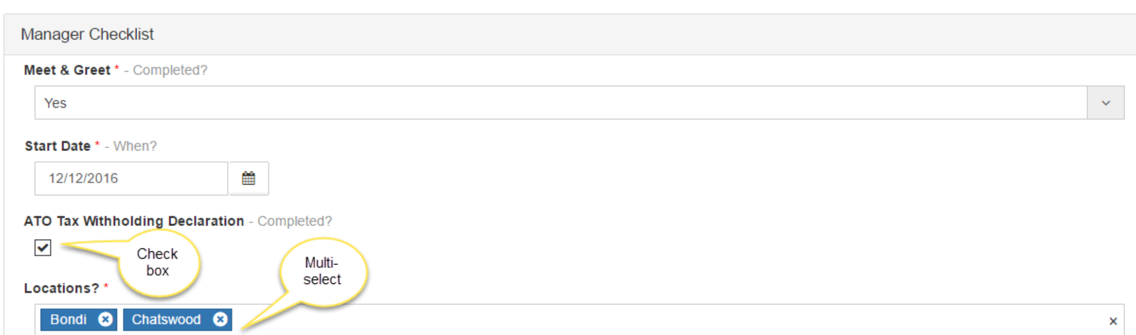
In this release, we have added check boxes and multi select functionality to the Custom Fields – Response Type area.

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).





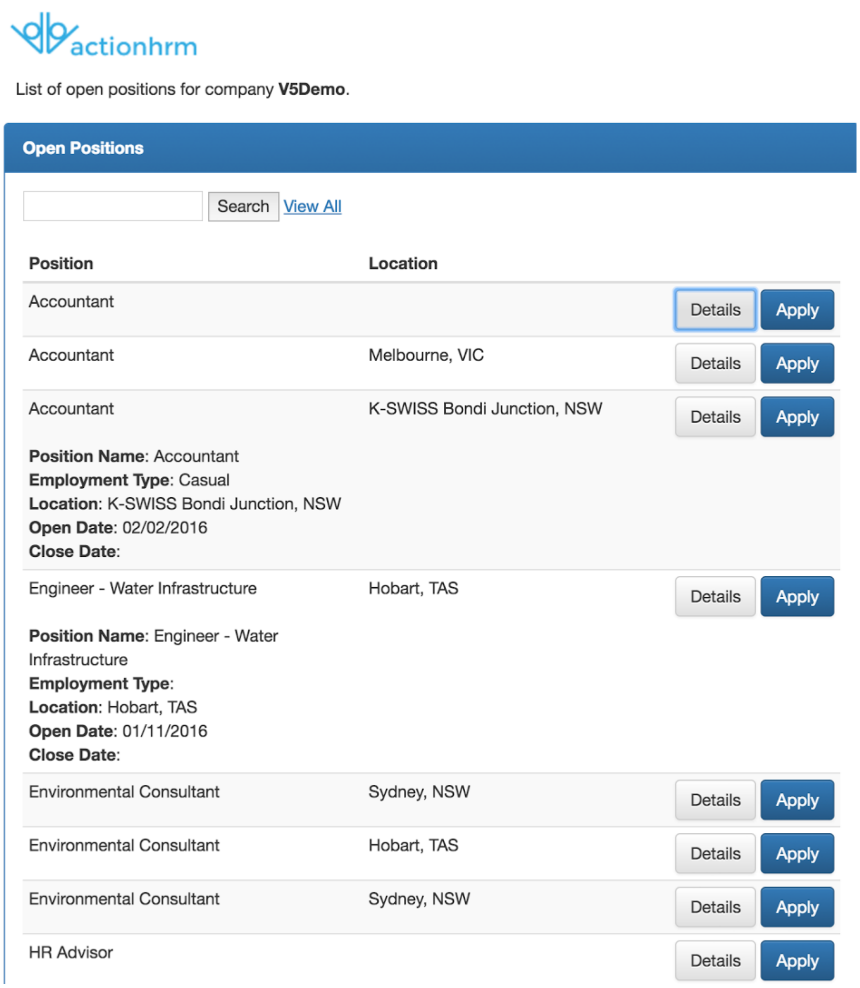




New Positions Listing page

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

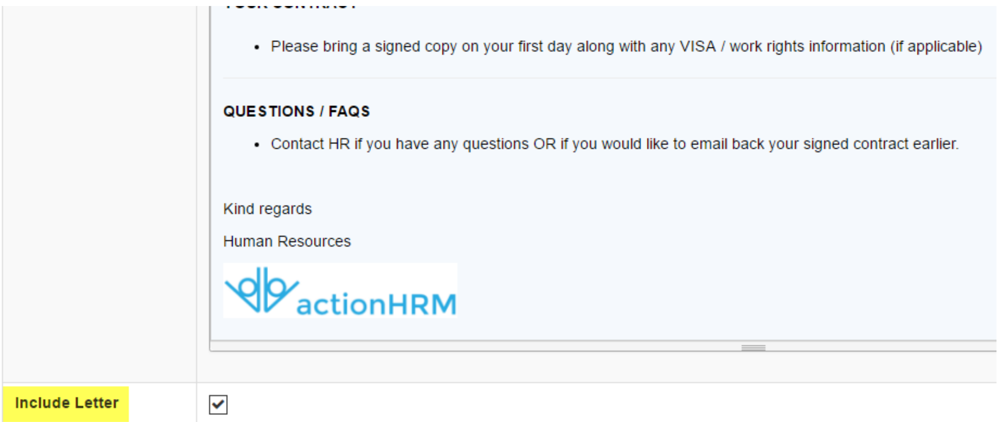
Click on the Details button for more info (if specified) including Employment Type, Open Date, and Close Date.



Recruitment Notification changes

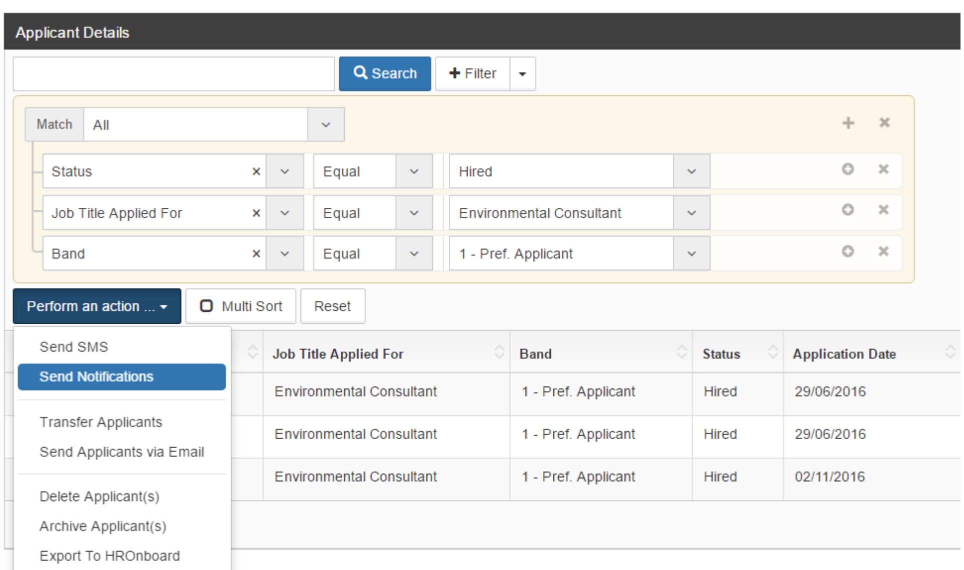
One of the biggest changes in this release is in the Recruitment > Notifications area. We have added the ability to send applicants Custom Letters and Word Exports.

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).

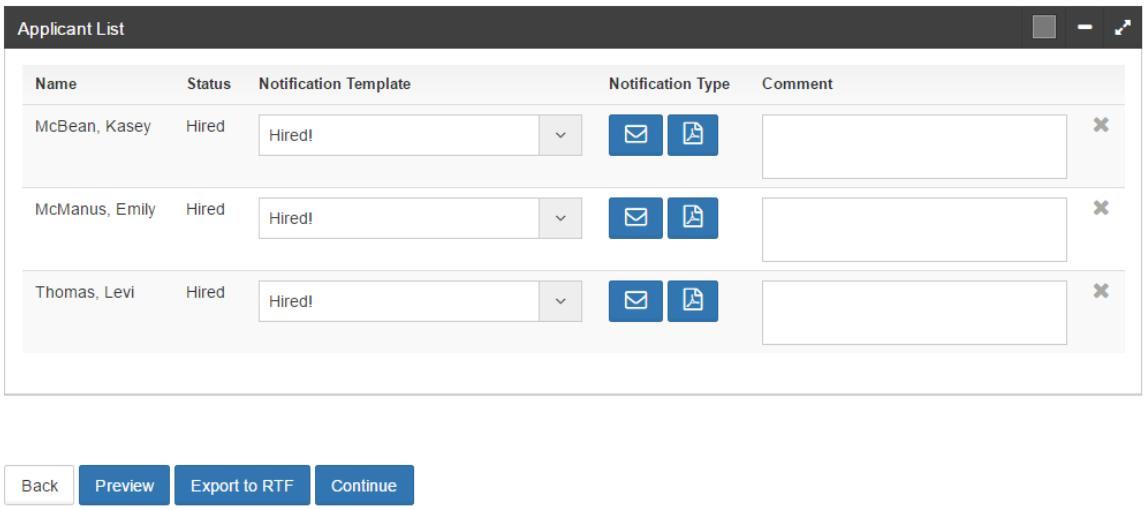


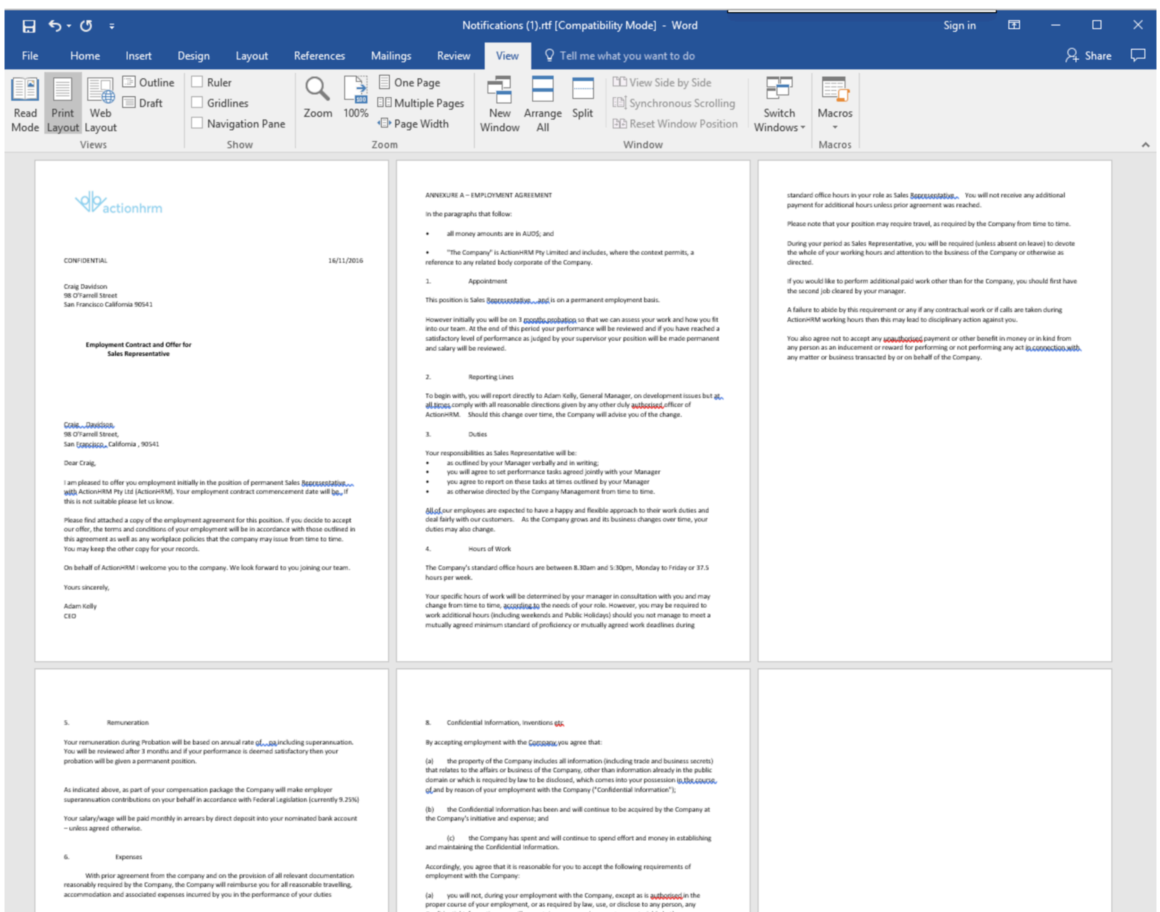
Letter details will then appear below. These now include Letter Format, Header, Title, Text / Body, Signature Block and Footer.

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



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).



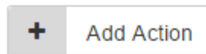


(Sample RTF)

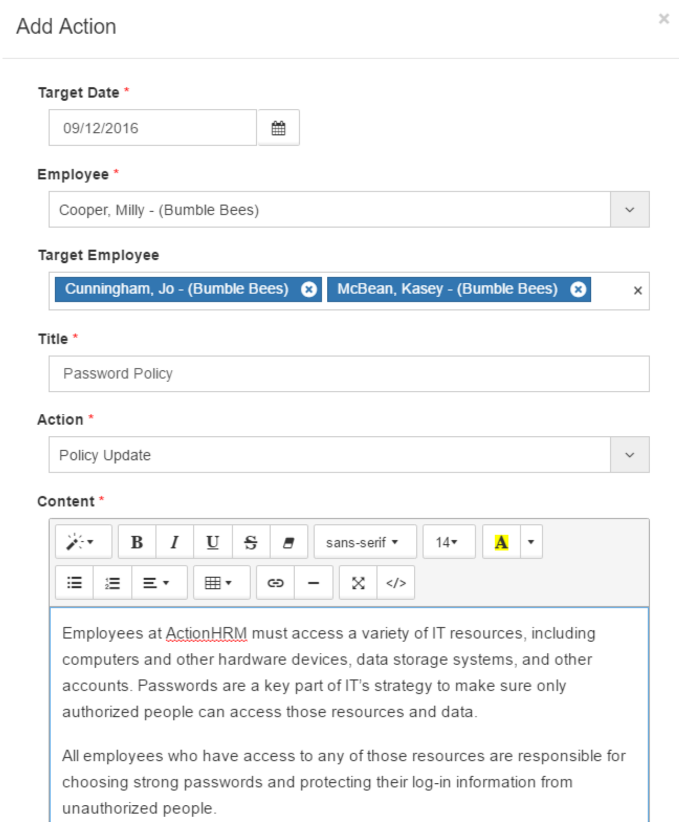
New ToDo - Actions

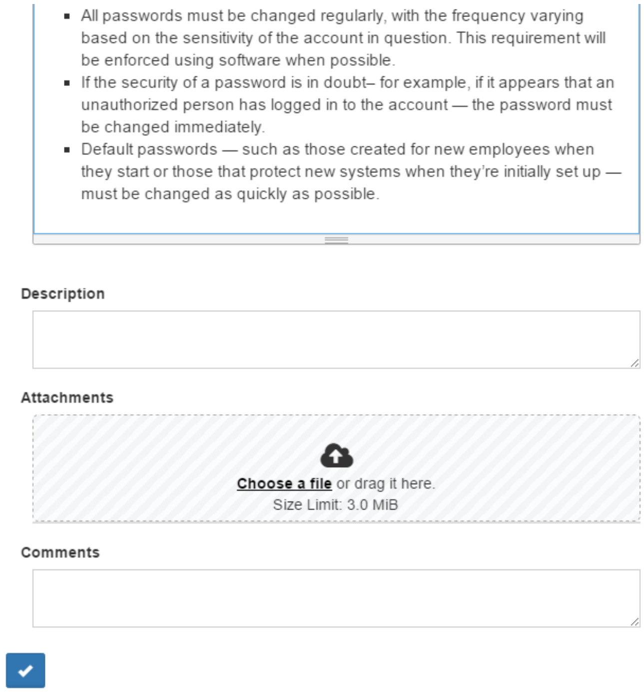
Another big change in this release is the ToDo > Actions capability. This can be used for sending out basic tasks, news and messages, checklists, or policy updates for individual employees or groups of employees to review / complete and sign off on.

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).

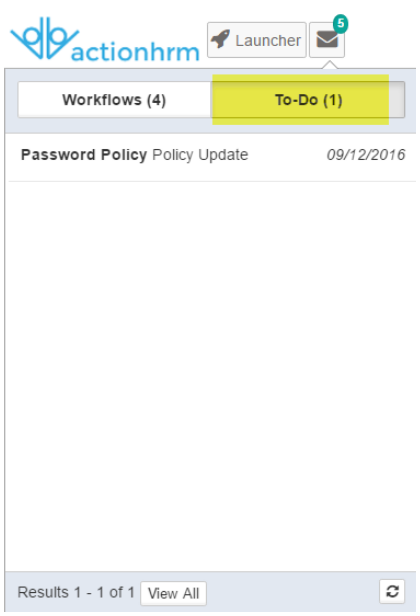




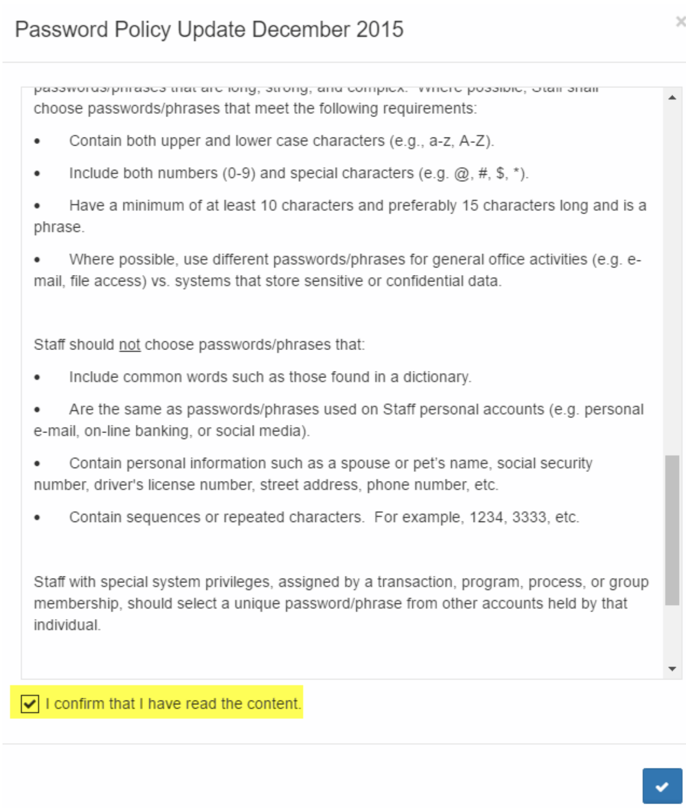
You will need to input a Target Date, a 'Required by' employee, and Target Employees / Employees to Action, a Title, an Action Type e.g. Policy Update (these can be set up in ToDo > Admin > Action Type), and some content.

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 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”.



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.