5.29

actionhrm

Release Notes

JULY 2017

Enhancements – Overview

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- More details in Action Quick View
- Other Action changes
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- Specifications for Employee Groups
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- Tile View option in Company > Document Store

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- Ability to reopen completed WF (admin)
- Custom notifications now from two pages in Recruitment
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- Allow deletion of Interviewees on Schedule Interview page

- Enable employee selection in Ad hoc Training Request and Qualification Change workflows
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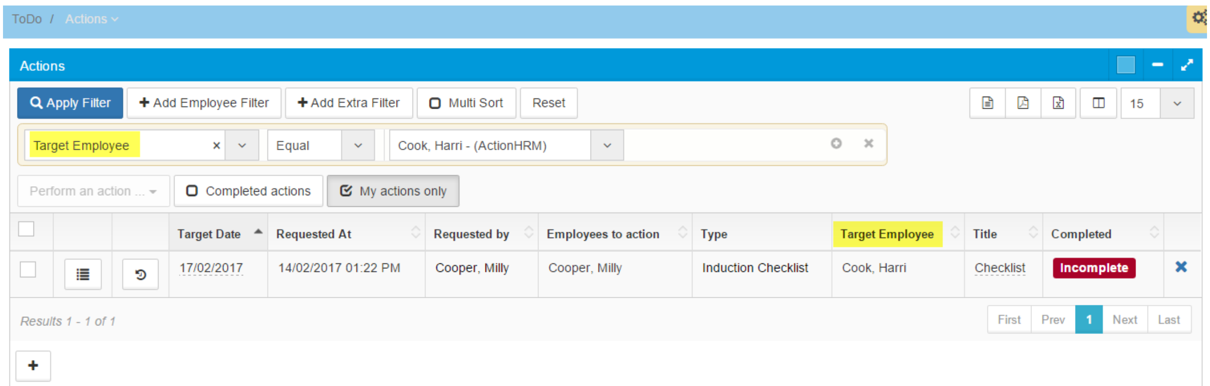
Enhancements - In Detail

Target Employee displayed in ToDo > Actions

Based on your feedback, we have re-added Target Employee as a column on the ToDo > Actions form.

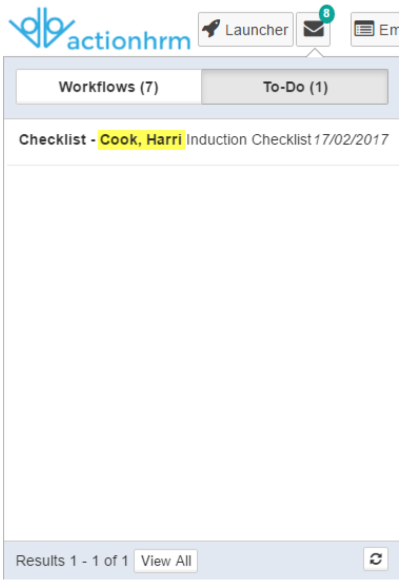
This also means you can now filter based on Target Employee.

We hope this makes it easier to search for specific actions.



More details in Action Quick View

In line with re-adding the Target Employee in the ToDo > Actions form, we have also added Target Employee in the Action Quick View box. This means that if you have multiple actions of the same type (e.g. Induction Checklists for three new starters), you will be able to tell the Actions apart. The Quick View box will also show other details if applicable, like Comments.

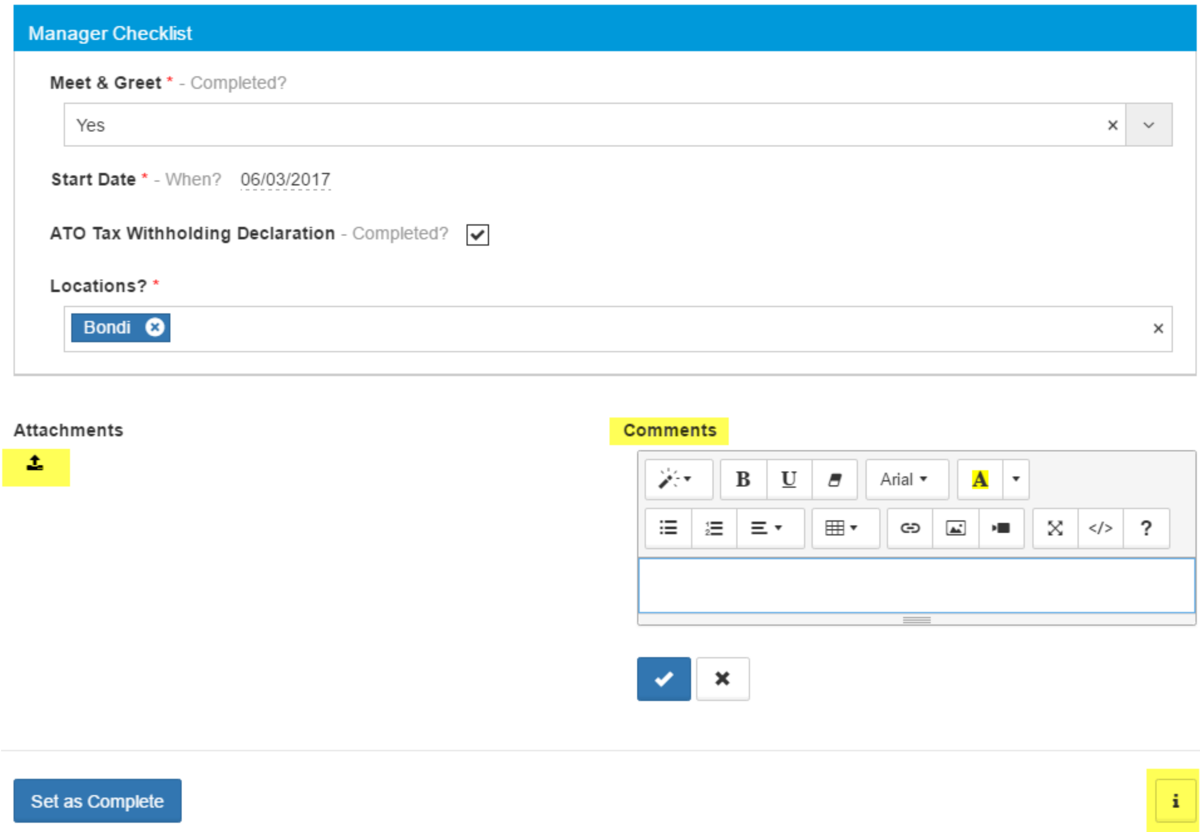


Other Action changes

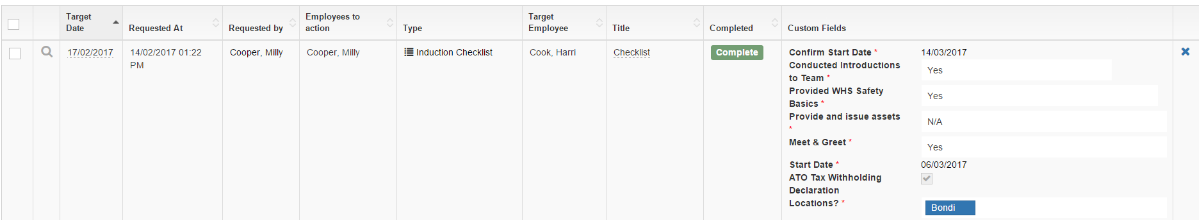
In addition to adding Target Employee, and more details in the Action Quick View, we made some other table display changes to the Actions area.

Instead of having two separate buttons on the left of Actions (one for the Action content and one for the Action history), we now just have our standard 'View Details' symbol ( ).

Once you click on this, you will be able to view / complete content, upload attachments, leave comments, and view action history (by clicking on the i)

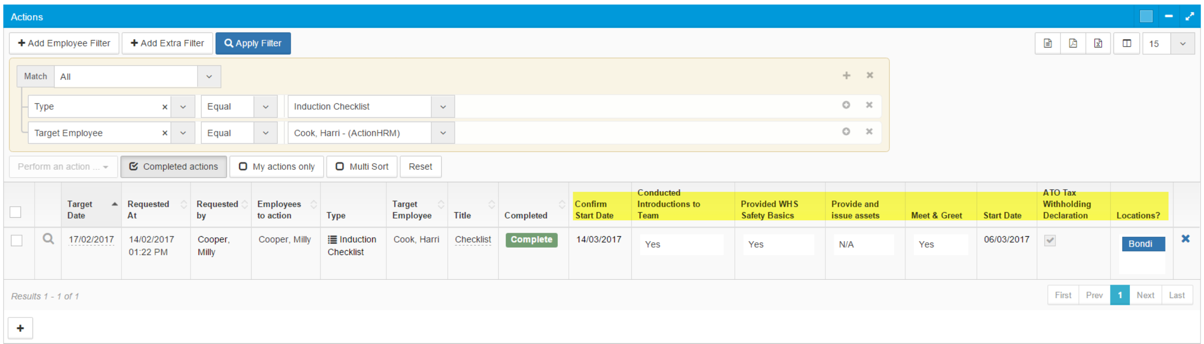


We have also included Custom Fields in the Action table now (Read Only), so you will be able to quickly view (not edit / add) information from the main Action form



		Target Date	Requested At	Requested by	Employees to action	Type	Target Employee	Title	Completed	Custom Fields		
		17/02/2017	14/02/2017 01:22 PM	Cooper, Milly	Cooper, Milly	Induction Checklist	Cook, Harri	Checklist	Complete	Confirm Start Date *	14/03/2017	
										Conducted Introductions to Team *	Yes	
										Provided WHS Safety Basics *	Yes	
										Provide and issue assets *	N/A	
										Meet & Greet *	Yes	
										Start Date *	06/03/2017	
										ATO Tax Withholding Declaration		
										Locations? *	Bondi	

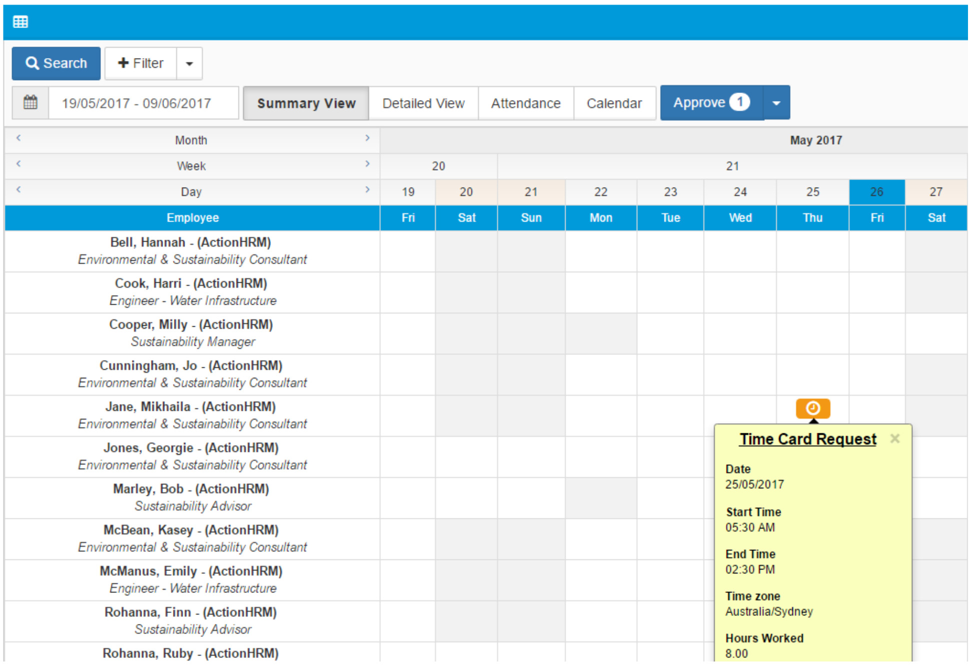
If you have filtered for only one type of Action (e.g. Induction Checklists), these custom fields will appear as separate columns.



Workflow Admins to approve Time Cards in Planner

Prior to this release, only Managers / Supervisors have been able to approve employees Time Cards in the Planner.

In this release, we have also given Workflow Administrators the ability to approve or deny employees Time Cards from the Planner. We hope this makes the process quicker and easier.

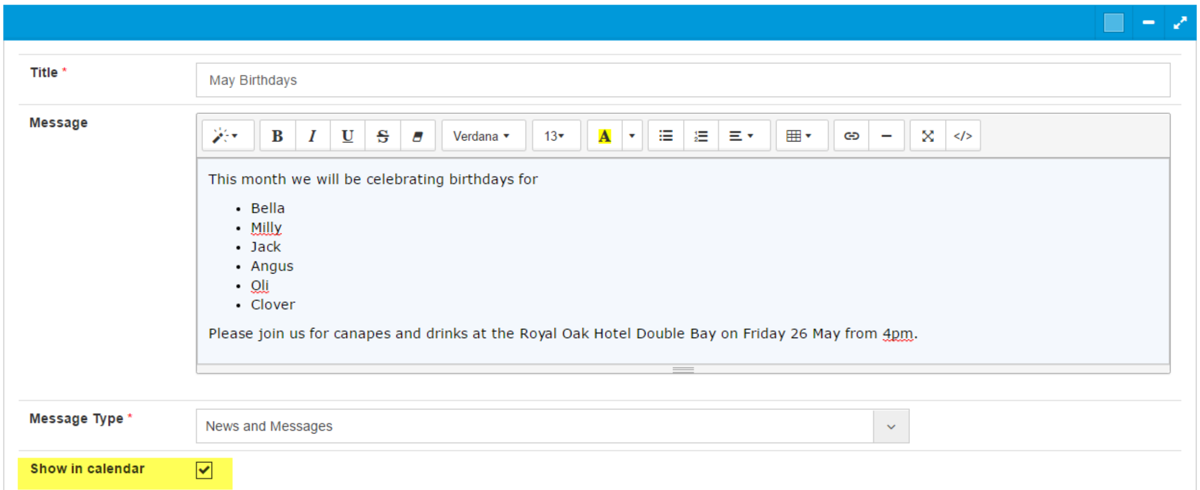


Upcoming Events dashlet on Home page

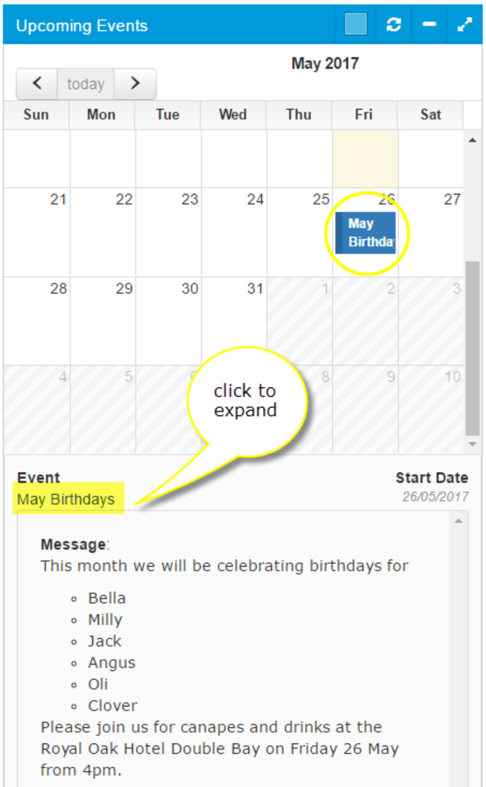
We have added a new dashlet on the Home page so that employees can view Company Events.

To add Events here, go to Home > Admin > Messages >

You will need to check the box to "Show in Calendar"



The Event dashlet will look like this. Click on the event title to view details



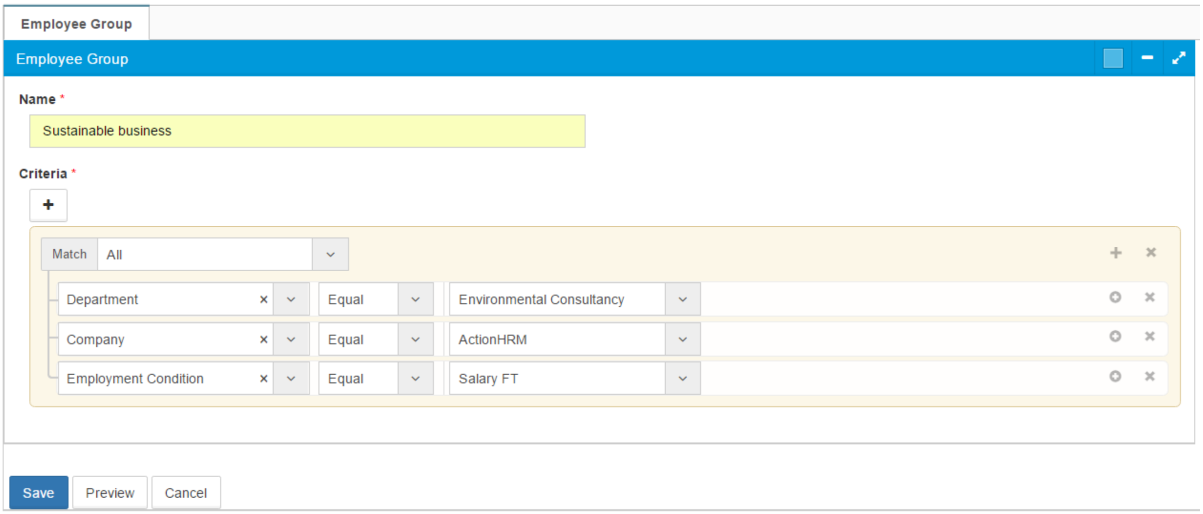
Specifications for Employee Groups

Recently we added the ability to add specifications to Jobs, Locations, and Position Identifiers, in this release we have expanded this capability to also include Employee Groups.

To add specifications to Employee Groups, you will have to have an Employee Group set up first.

To add a new Employee Group, go to System > Emp Groups > +

Click on + under Criteria, to add filters for your Group (e.g. Department, Company, Employment Condition)

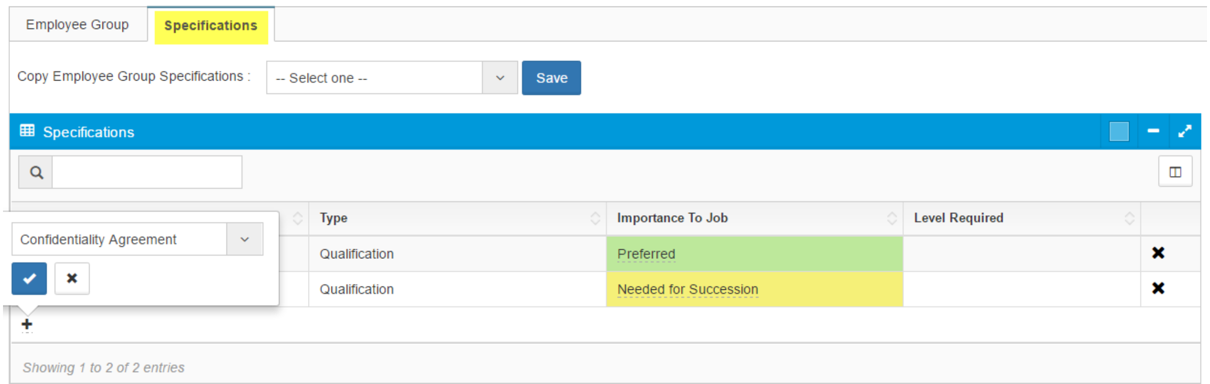


Click ‘Preview’ to view a list of all Employees who qualify for this Group.

Click Save.

Once your Employee Group has been set up, click into it using the magnifying glass symbol. You will see a new tab at the top with ‘Specifications’. Inside this tab, click ✚ to add a specification. You can copy specifications from other Employee Groups once a few of these have been set up.

You will also need to specify the Importance for Job, and (if applicable) Level Required.

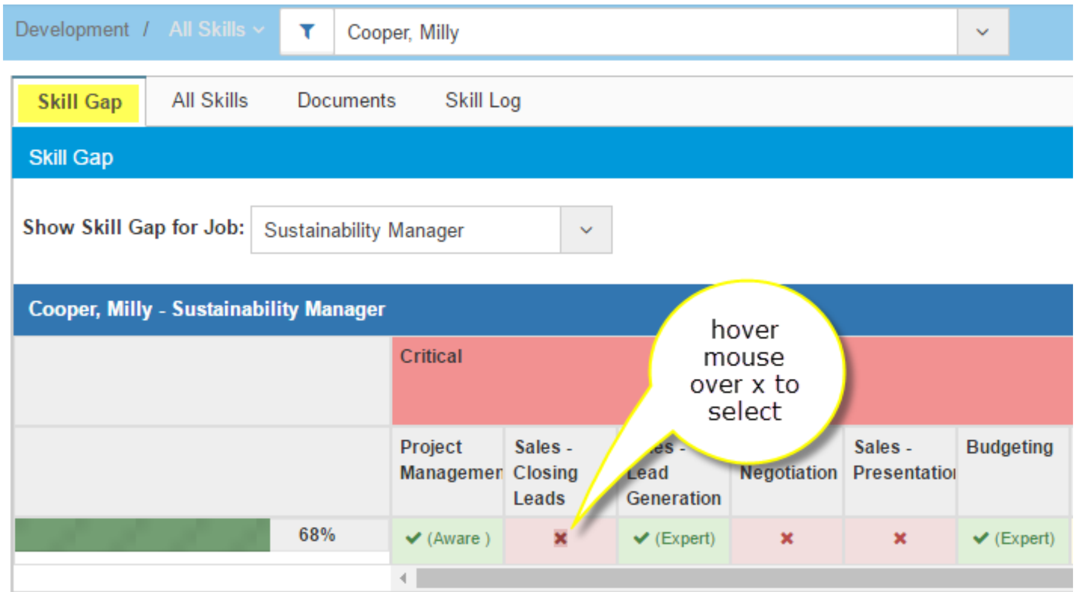


Quick Add Skills from Employee Skill Gap

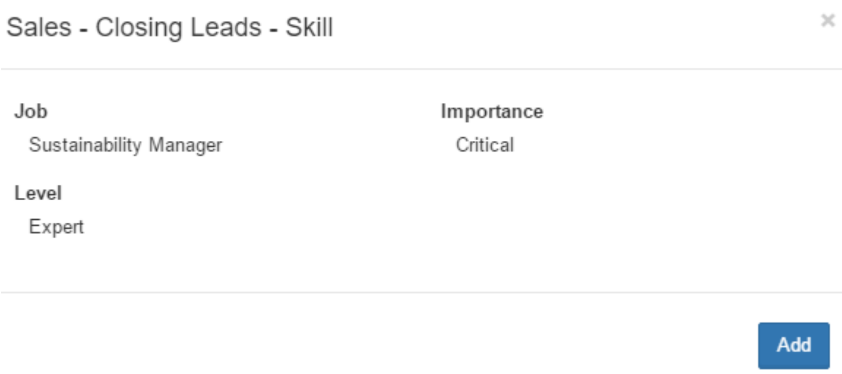
Another feature we have developed to improve the Employee Specification / Skills area, is Quick Add from the Employee Skill Gap page.

Previously, you had to add Specifications / Skills to employee profiles from the All Skills tab (Development > All Skills).

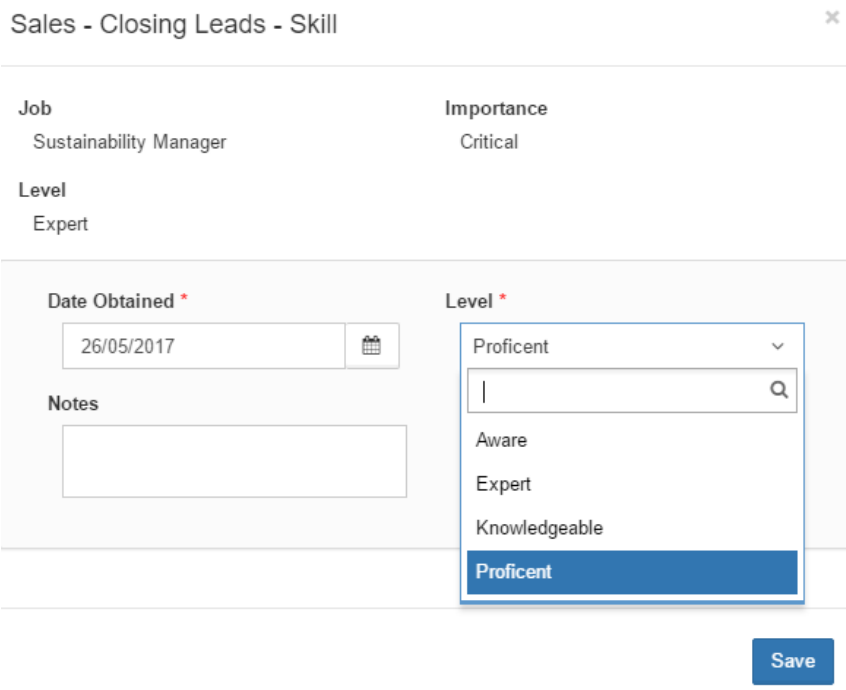
Now you can add them quickly from the Skill Gap tab.



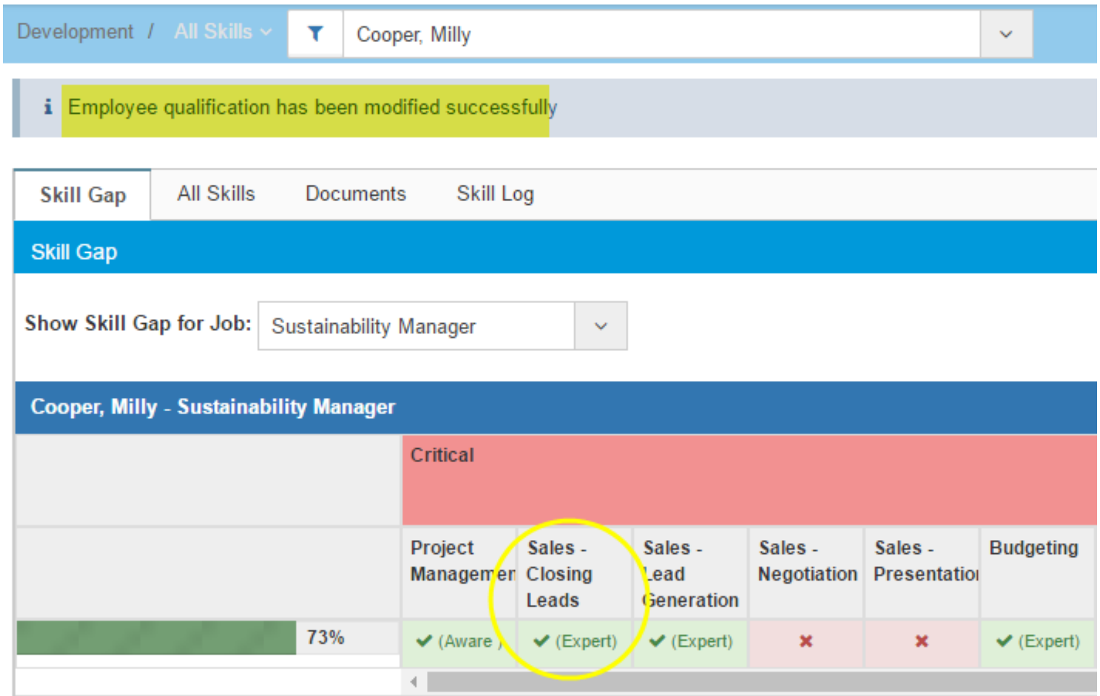
Hover your mouse over the x and click to view details i.e. Job, Importance to Job, and Level Required.



Click Add to input specification details i.e. Date Obtained, Level, Notes



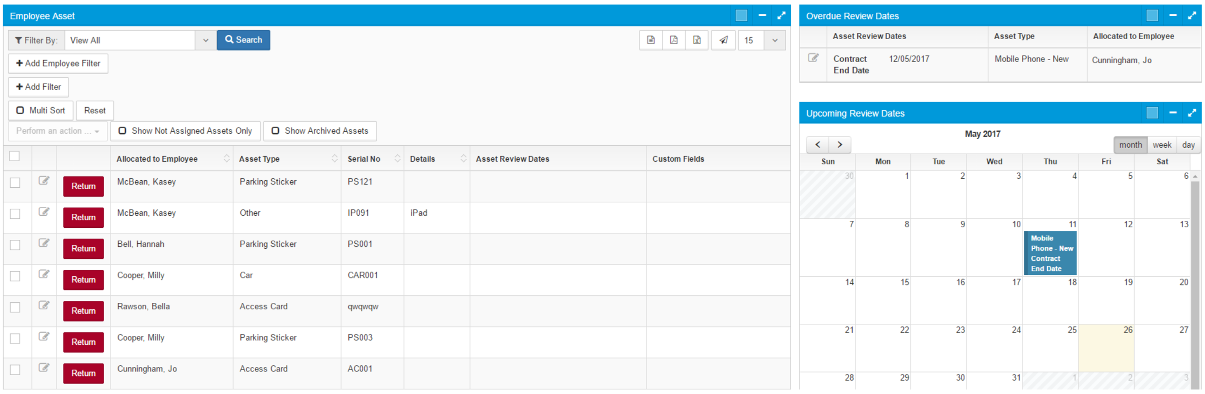
Click Save. The Specification / Skill will immediately show as obtained (with Level obtained if applicable). It will also be added to the Employees 'All Skills' page.



Extended Asset Interfaces

Extending on the Asset changes we made in the last release, we have re-modelled the main Asset page and added a series of dashlets. The dashlets include –

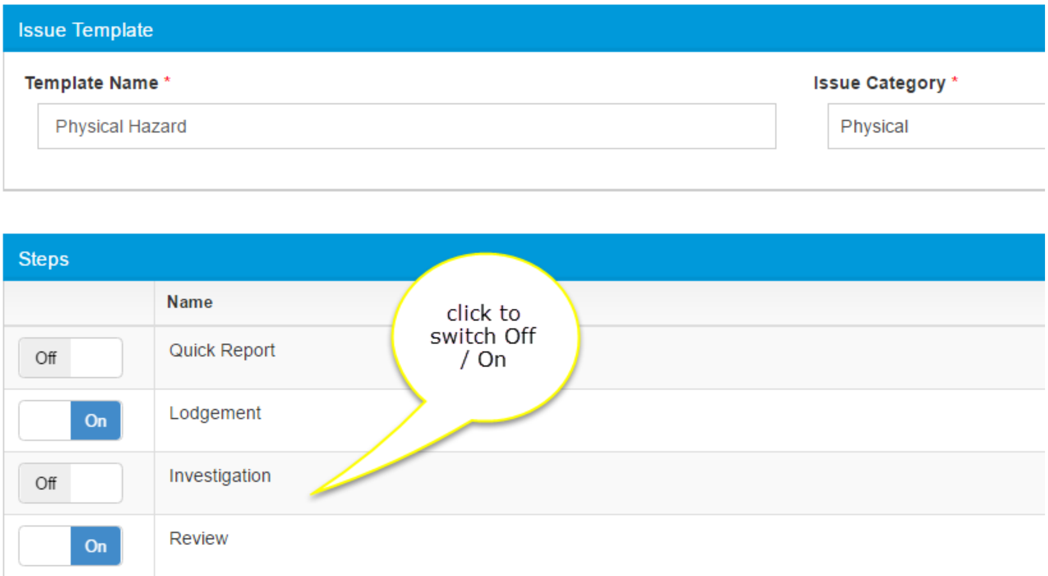
- A table for ‘Overdue Review Dates’ with Date, Asset Type, and Allocated to Employee,
- A calendar for ‘Upcoming Review Dates’ (can click Review Dates on Calendar to view more info),
- A table for ‘Terminated Employee Assets’ with Terminated Employee Name, Asset Type, Serial Number, and Details
- A ‘Summary of Assets’ with a list of Asset Types, and figures e.g. number of Overdue Review Dates, Number of Assets from Terminated Employees, and Total Sum of Assets



New Features - In Detail

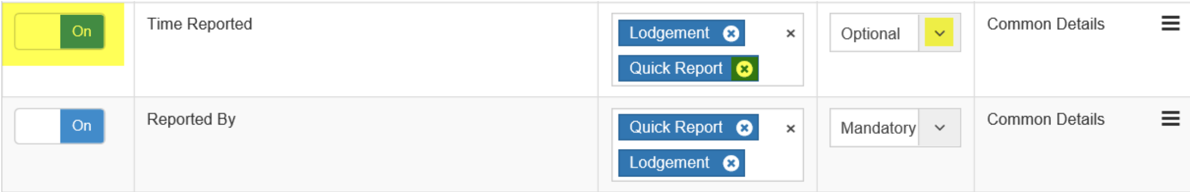
WHS Incident and Hazard Report Configuration

One of our biggest updates in this release has been adding configuration to the WHS module. Similar to the New Employee Wizard Configuration (in the Employee module), you can now turn WHS fields and forms off / on and change the workflow order (e.g. instead of our standard Quick Report, Lodgement, Investigation, and Review forms, you might just have a Lodgement and a Review, instead of having 11 standard fields on the Quick Report page, you might just have two, and add three of your own custom fields).



To turn WHS fields and forms off / on, go to WHS > Admin > Issue Templates > click the magnifying glass beside the template you want to adjust > under Fields Configuration click off / on box.

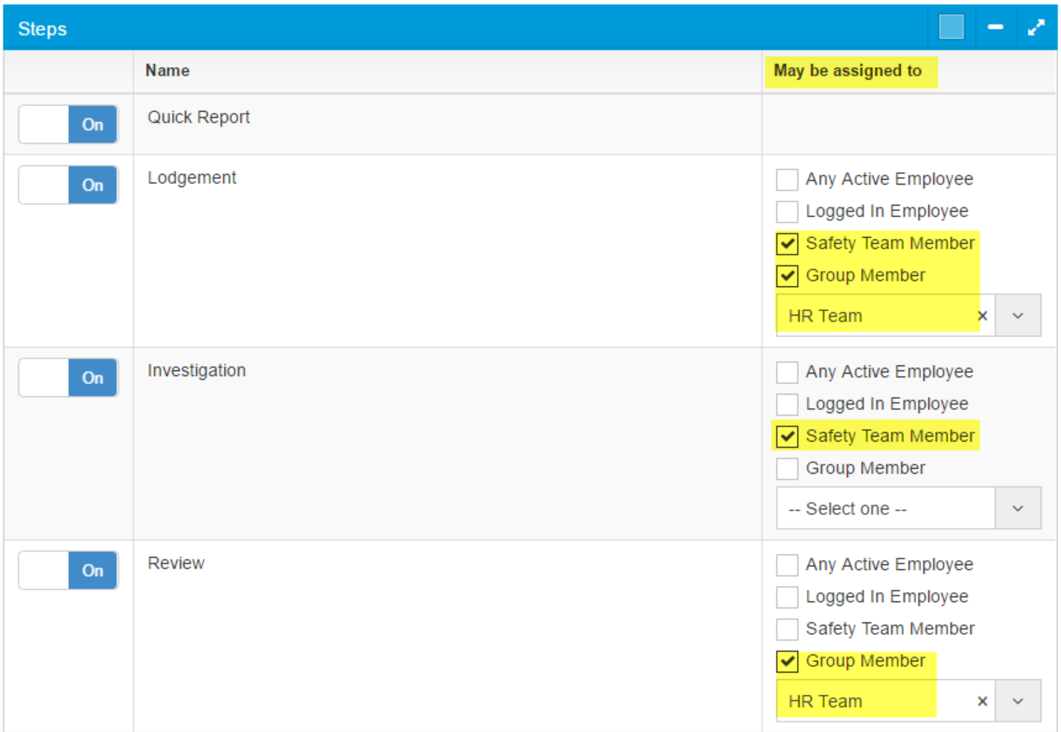
From here you can also choose which form the field will appear on (e.g. Lodgement, Quick Report, Investigation etc.), and whether the field is Optional / Mandatory / Preferred. This page will also display which field group this field belongs to (column on the right hand side).



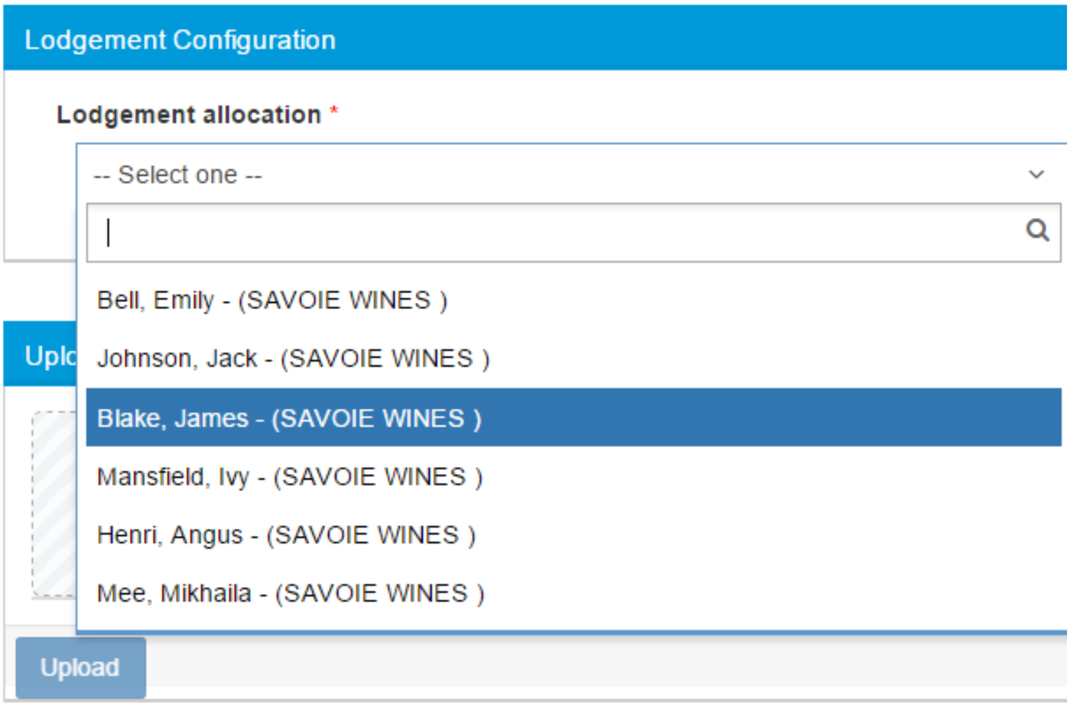
WHS Investigation and Sign-off allocation

Along with the other WHS improvements, we have extended the Investigation Sign-off / allocation. This means that now you can specify the employee / group of employees who should be signing off on each step.

To define WHS sign-off / allocation, go to WHS > Admin > Issue Templates > to open template > under Steps, check box for who that step can be allocated to e.g. Lodgement can be allocated to any member of the Safety Team, or any member of the HR Team group, Investigation must be allocated to a member of the Safety Team, and Review must be allocated to a member of the HR Team.



When employees are completing a WHS Incident / Hazard workflow, they will only be able to allocate their workflow to Safety Team members or Group members that you have specified.

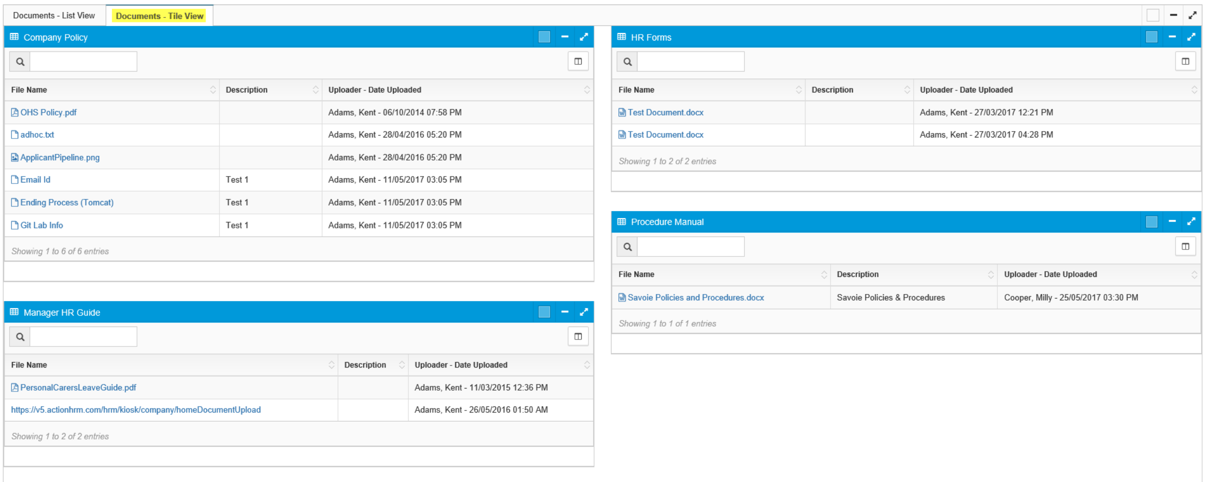


Tile View option in Company > Document Store

Another new feature we have in this release is an updated view in the Company > Document Store. Previously we just had a list view, and while this list was filterable by ‘Document Type’, some of you found it hard finding specific documents when there were hundreds to search through. Hopefully you will like our new Tile View.

The Tile View displays the Document Types in separate areas, with all associated documents listed underneath the heading.

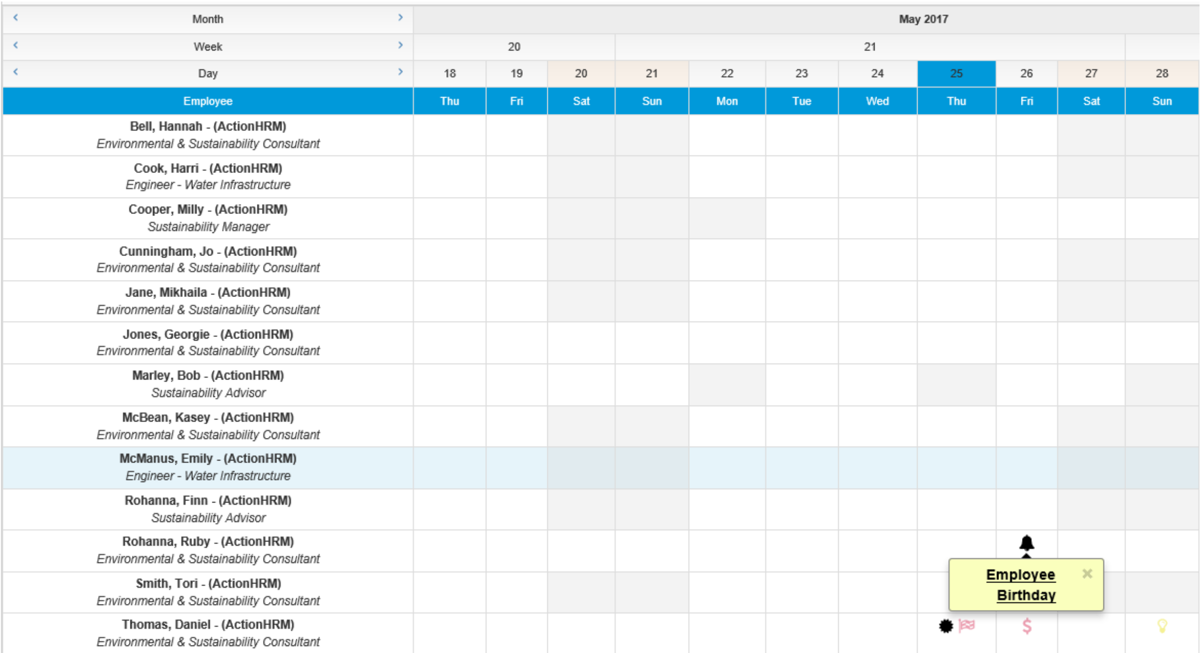
These tiles / boxes can be minimised or expanded using the  buttons



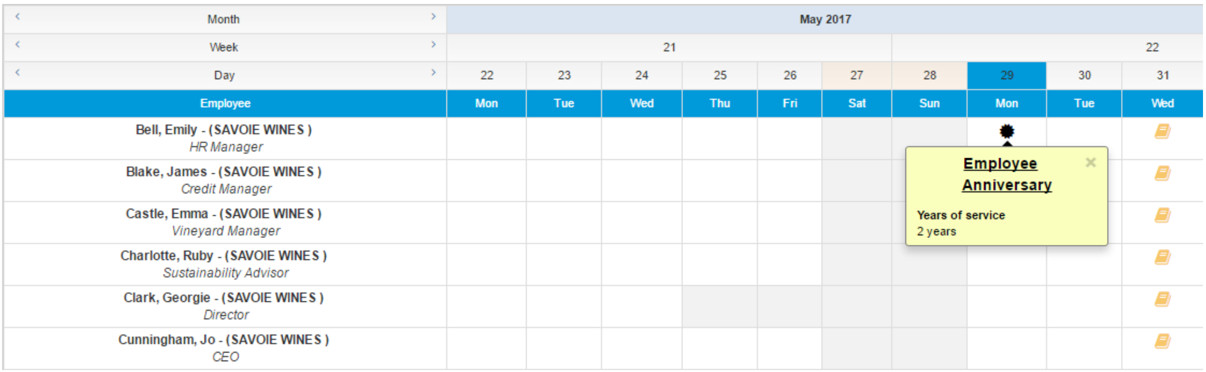
Minor Changes - In Detail

Employee Birthdays and Service Anniversaries displayed in Planner

One change we have wanted to make for ages, is to include employee birthdays and service anniversaries on the Planner. We now support this. Note: The employees birthday must be recorded on either the Employee > Establishment form, or the Employee > Additional Information / Employee Profile form. The birthday symbol on the planner is a bell.



The service anniversary symbol on the planner is a sun (and is linked to the Start Date on the Employee > Establishment / Employee > Employment forms)

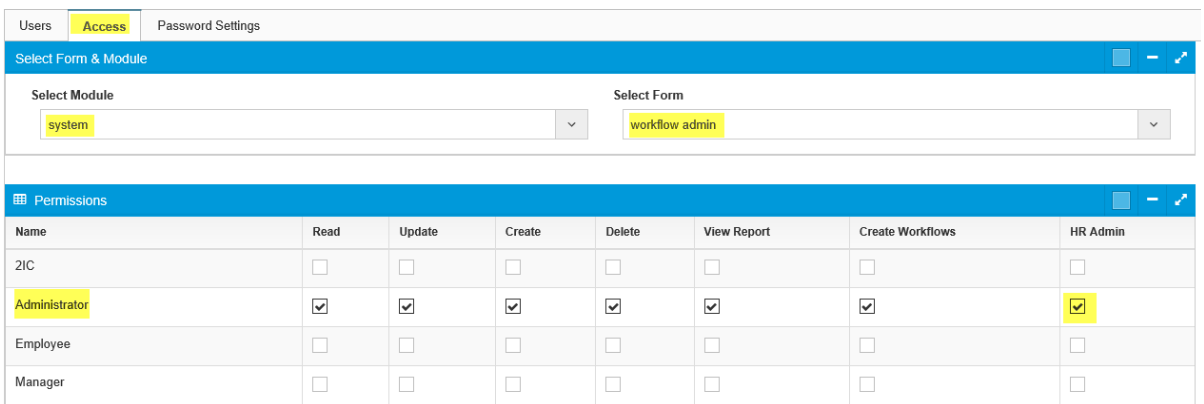


Ability to reopen completed WF (admin)

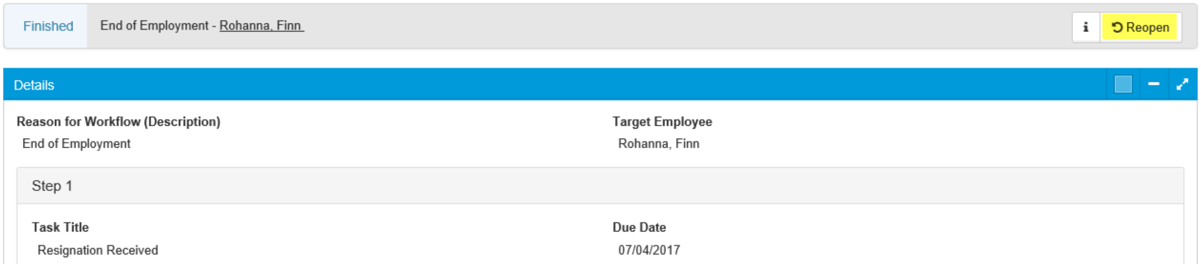
We have added functionality so that HR admins can re-open completed workflows. Once re-opened, workflows can be sent back or escalated, attachments can be added, and comments can be changed. Workflows can also be cancelled or deleted.

For Administrators to have access to this function, they will need to have HR Admin access in the Workflow Admin form.

To add, go to System > Users and Security > Access tab > select system (module) and workflow admin (form) > next to Administrator, check box for HR Admin



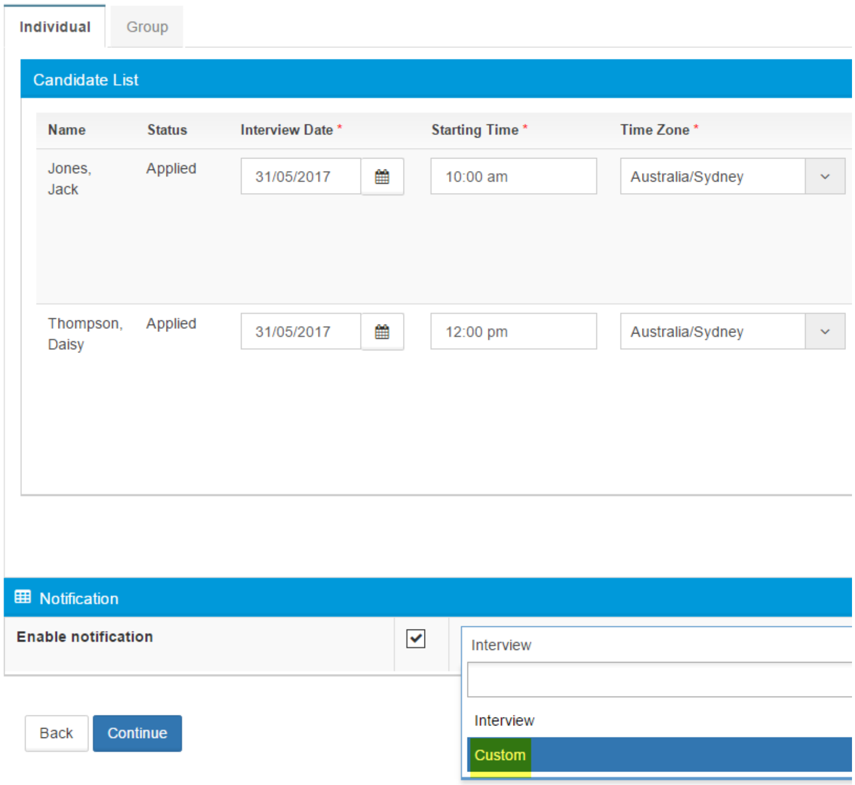
Once you / your Administrators have this access, go to System > Workflow Admin > All Completed Workflows tab > use the magnifying glass to open workflow > click the  button on the top right corner of the workflow



Custom notifications now from two pages in Recruitment

One of our clients helped point out to us, that you could only send Custom notifications from the Applicant area, by going to Perform an Action > Send Notifications.

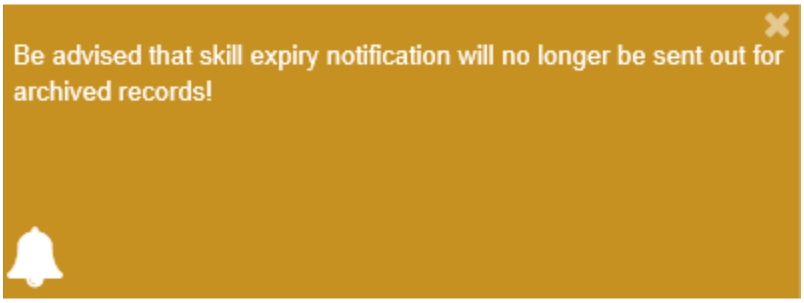
We have expanded this so that now you can also send Custom notifications from the Schedule Interview form.



Block Alerts for archived Specifications

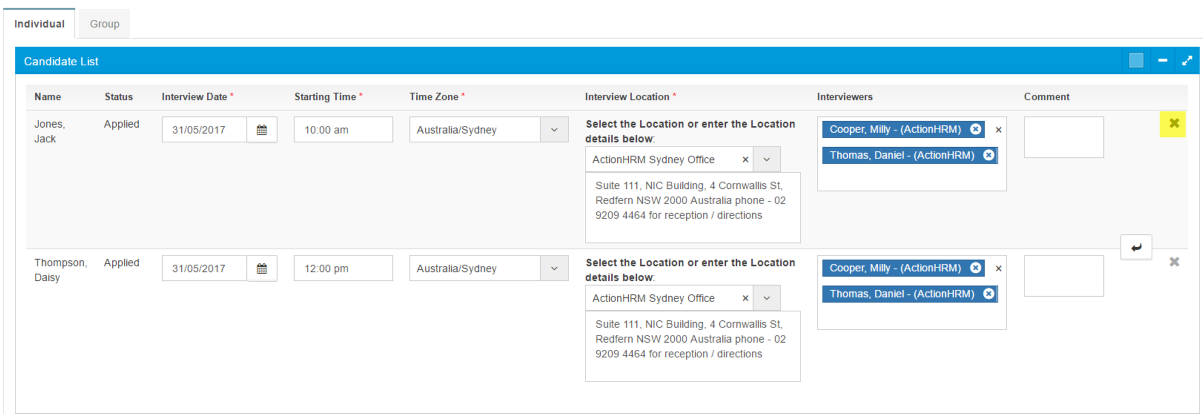
Another minor update in this release, is that we are now blocking alerts for archived skills / specifications / certifications etc. We had some feedback that these were still going out and causing confusion around which specifications were still valid, which needed renewal etc.

When you archive a specification now, you will receive a pop up message to remind you that skill expiry alerts will no longer be sent out for archived specification / skill records.



Allow deletion of Interviewees on Schedule Interview page

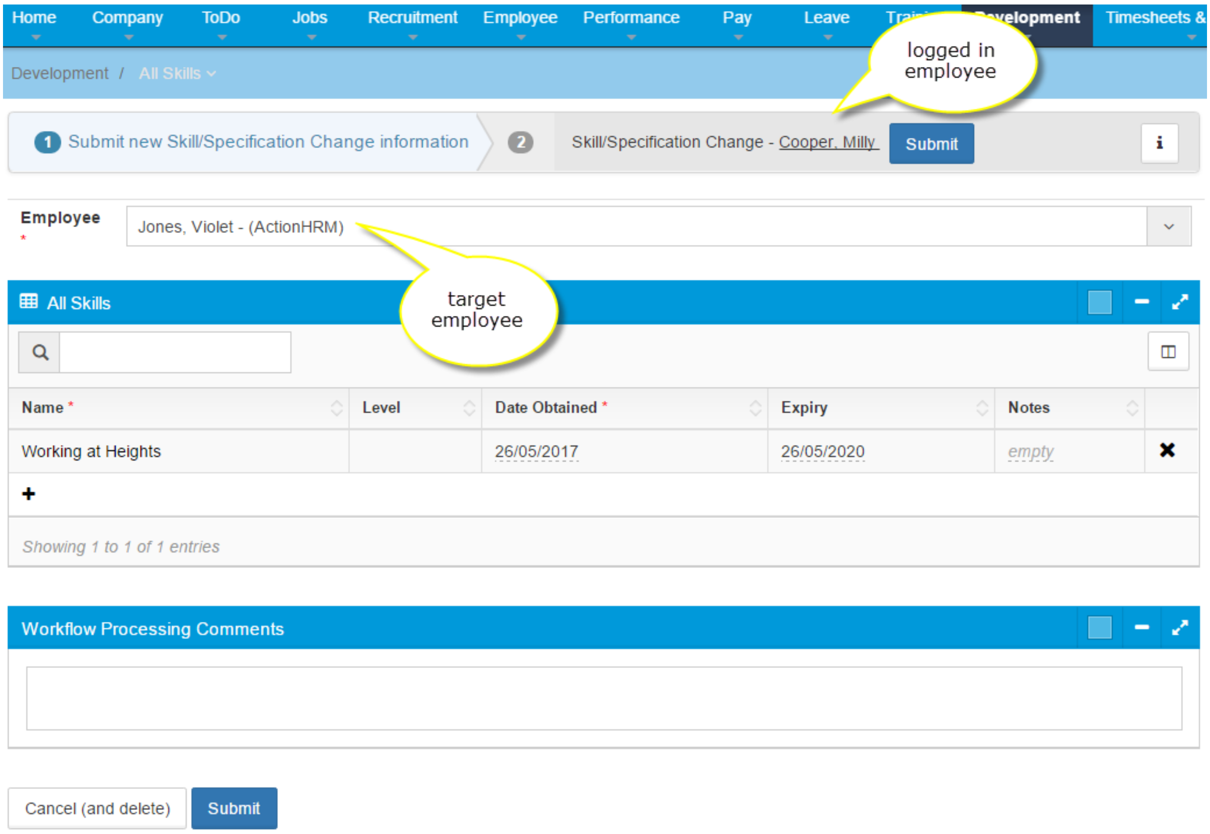
We have added to the functionality on the Schedule Interview form, so now you can clear candidates interview details. If you are entering details for multiple candidates, and pick the wrong candidate by mistake, now you can click ✖ instead of clicking 'Back' and having to start again.



Enable employee selection in Ad hoc Training Request and Skill / Specification Change workflows

In the 5.27 release, we added an Ad hoc Training Request and Skill / Specification Change workflow. The Ad hoc Training Request workflow was intended to be raised by the employee who has completed the training, and then routed to a Manager / Supervisor for approval, before being sent to HR for sign off. Similarly, the Skill / Specification Change workflow was developed with special access for employees. Generally, employees would only have 'Read' access to the Development > All Skills form which means they couldn't add skills or specifications directly to their profile. However, special access to this workflow meant that they could *request* skills (using the workflow).

In this release, we have updated both these standard workflows so that now Managers / Supervisors can raise on behalf of their subordinates, and select a Target Employee.



Configure the number of digits in employee payroll number

As requested by one of our clients, we have added the ability to configure the number of digits in your Payroll number on the Employee > Establishment page. This means that where you may have previously had to enter one or more '0's before your Payroll number, you now won't have to.

To configure the number of digits in your Payroll number, give the office a call on +61 2 9209 4464 or email me at holly.vautin@actionhrm.com, and I can make this change for you.