Release Notes

Release date: 05.02.26
Version: 24.13.0

Enhancements

Extend Search to All Screens

Overview:

Following customer feedback, the Search Bar now returns results for every screen the user has permission to access. This improves navigation, reduces menu-hunting, and helps users locate screens in seconds.

Benefits:

- Faster navigation across HCM
- Reduces training time for new users
- Prevents confusion when searching for screens not previously included
- Respects role-based permissions for secure access

How to Use:

- Simply use the Search Bar in the top navigation
- Results automatically filter based on the user's access
- If a user selects a screen they do not have permission for, they are redirected to the homepage

Workflow Steps Message Content: Improved Field Selection

Overview:

We've redesigned the field-selection experience when adding dynamic tags to workflow messages, making it clearer, more structured, and easier to use.

Benefits:

- Categories help users quickly find relevant fields
- Alphabetical ordering boosts usability
- Reduces scrolling and confusion when inserting tags
- Ensures consistent and predictable tag insertion

How to Use:

- Navigate to Admin → HR → Workflows
- Open any workflow step message
- Click the + icon above the editor to access the new tags panel
- Select the appropriate tab and click a tag to insert it

Screenshot: Showing new UI for displaying Workflow tags in the Workflow builder

Reporting: Company Document Creation & Expiry Dates

Overview:

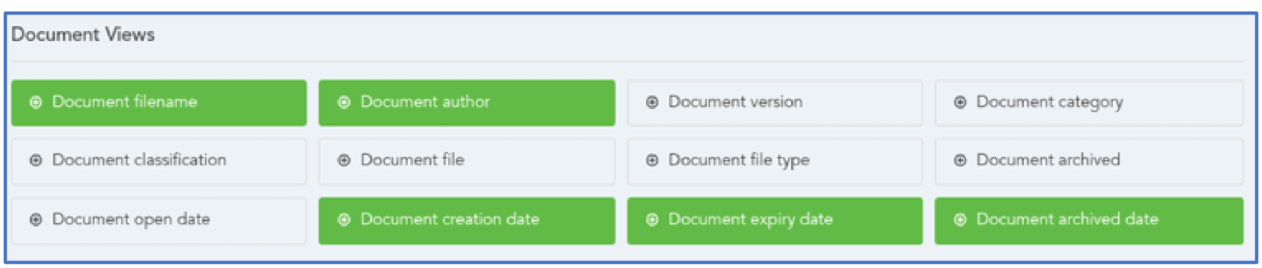
To support compliance management, three new fields are now available in Report Builder for company documents.

Benefits:

- Better tracking of policies and compliance documents
- Allows HR teams to set external workflows and reminders
- Supports proactive review of expiring documents
- Helps organisations remain audit-ready

How to Use:

- Go to Reporting → Report Builder
- Choose Company document view tracking or Company document signatures datasets
- Select new fields:
  - Document creation date
  - Document expiry date
  - Document archived date
- Add them to your custom report



Screenshot: Showing new fields available when building a Document Views report

Reporting: Click Employee to Open Employee Card

Overview:

Users can now click an employee in report results to instantly open their employee card in a new tab.

Benefits:

- Faster access to employee information
- No need to rerun reports
- Reduces navigation time in HR workflows
- Supports real-time auditing and investigations

How to Use:

- Ensure Employee ID is included in your report
- Run the report in Report Builder
- Click the employee in the results list to open their card

Employee ID	Full Name	Start Date	Job Title
41	James Dawson	27/04/1996	Managing director
42	Phoebe Parker	04/07/2005	Executive director
43	Daniel Parker	04/11/2009	General manager

Screenshot: Showing clickable Employee IDs in an Employee Report

Dashboard Drilldowns: Click Employee to Open Employee Card

Overview:

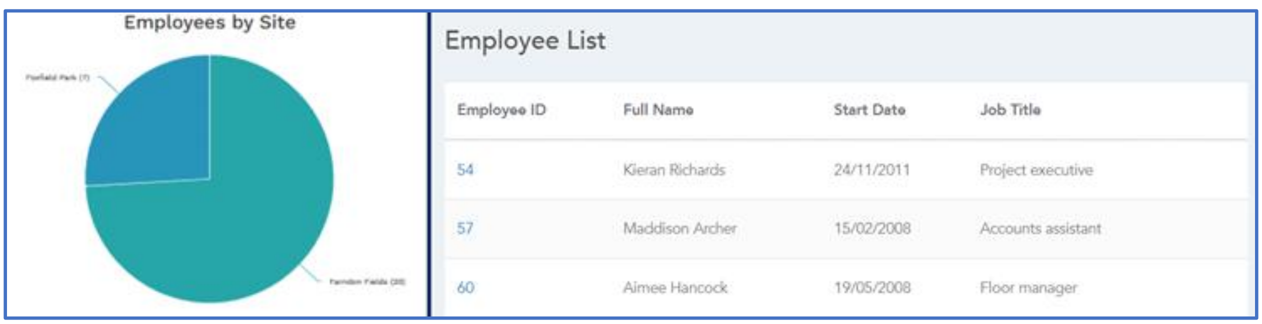
When drilling down into a dashboard widget, users can now select an employee to open their employee card in a new tab.

Benefits:

- Consistent experience with report-based drilldowns
- Enables real-time investigation from dashboards
- Saves time switching between dashboards and employee profiles

How to Use:

- Ensure dashboards include Employee ID
- Click a dashboard tile → drilldown list
- Click an employee to open their card



Screenshot: Showing a pie chart used in a dashboard, the resulting drilldown with clickable Employee IDs

Reinstate Duplicate Checking in Candidate Grid

Overview:

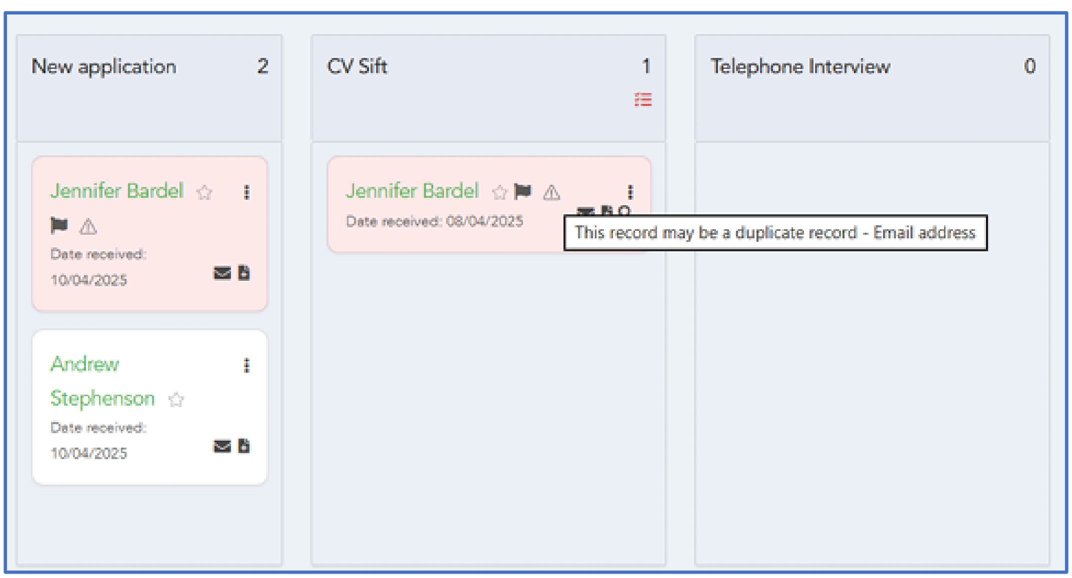
The recruitment grid now shows duplicate-candidate alerts without affecting page performance, even for large requisitions.

Benefits:

- Helps identify duplicate applications
- Provides clear indicators (exclamation icon)
- Supports clean and accurate candidate management
- Works reliably for large volumes (180+ candidates)

How to Use:

- Navigate to Recruitment → Requisition → Candidates list
- Duplicate alerts display automatically when a candidate shares:
    - National Insurance Number
    - Date of Birth
    - Email address
- Hover over the icon to view details



Screenshot : Showing the candidate 'Jennifer Bardel' flagged as a duplicate with the reason shown

Time Off Year Configuration Per Time Off Type

Overview:

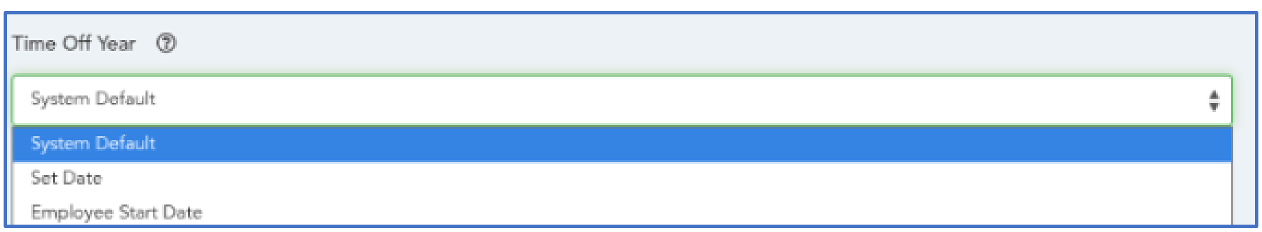
You can now set a unique 12-month year for each Time Off Type (e.g., Sick Leave, Holiday), ensuring correct entitlement and accrual calculations without depending solely on site-wide settings.

Benefits:

- Supports organisations with different annual cycles per leave type
- Ensures accurate entitlement, carryover, and accruals
- Reduces manual adjustments and errors
- Fully backward compatible (defaults to System Default)

How to Configure:

- Path: Administration → HR → Time Off Management → Time Off Types
- New field: Time Off Year
- Options:
    - System Default
    - Set Date (enters custom starting date)
    - Employee Start Date
- Custom year automatically updates all balances, entitlements, and reporting



Screenshot: Showing the Time Off Year option when configuring a Time Off type

API: Time Off – Work_ID Added

Overview:

The API now exposes the Work_ID field in all Time Off GET endpoints, enabling deeper integrations and more accurate linking of time off with working records.

Benefits:

- Supports external integrations requiring Work_ID
- Enhances auditing and record linking
- Backward compatible—no breaking changes
- Works across all GET endpoints

How to Use:

- No configuration required
- Use the updated endpoints:
- GET /timeoffGET /timeoff/{employeeId}
- GET /timeoff/{employeeId}/time-off/{timeoff_id}

Job Roles: Competency Validation & Notifications

Overview:

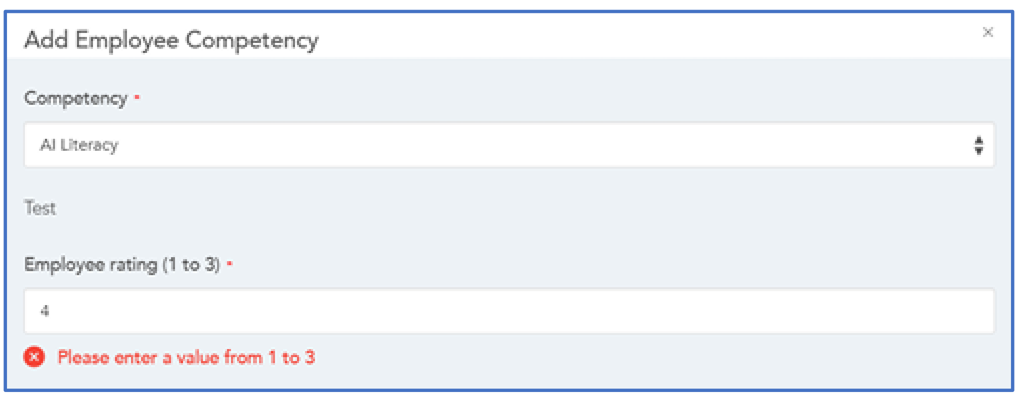
To improve data accuracy, users now receive clear alerts when entering invalid competency values or omitting a required competency name.

Benefits:

- Prevents accidental incorrect data entry
- Ensures scoring aligns with the organisation's competency scale
- Improves user understanding through red validation messages
- Reduces support queries due to "missing" saved values

How to Use:

- No configuration required
- When entering competencies:
    - Competency name is now mandatory
    - Score must be within the global competency scale (1–3, 1–5, 1–7, or 1–10)



Screenshot: Showing the validation added to the Add Competency dialog

Fixes

Time off duration incorrect with non-working days

Issue resolved where the system incorrectly calculated time off duration by including non-working days from company defaults instead of using the employee’s working pattern.

Error when converting time off

Issue resolved where converting time off via the Time Off Meter Convert page triggered an error, preventing conversion from days to hours or vice-versa.

Negative allowance shown for limited allowance bookings

Issue resolved where approving limited-allowance time off incorrectly displayed a negative donut value instead of showing remaining or zero allowance.

Archive tab missing in Data Management - Classifications

Issue resolved where the Archive tab disappeared when no active records existed, preventing access to archived classifications.

Homepage team filter error

Issue resolved where filtering by team on the homepage caused an error when users lacked assigned Site or Department.

Inconsistent country validation in Bulk Upload

Issue resolved where new employee uploads accepted “UK” but existing employee uploads rejected it, creating inconsistent validation in HCM-only environments.

HR users couldn't view restricted notes in reports

Issue resolved where HR users could not see manager-restricted employee notes in Report Builder, even with correct permissions.

HR users unable to schedule meetings

Issue resolved where HR users attempting to schedule a meeting in Performance saw an empty employee dropdown.

Admin unable to complete upload document workflow task

Issue resolved where clicking a workflow task for "Upload Mandatory Documents" did not navigate Admin users to the task page.

Error submitting training with recurrence

Issue resolved where creating a recurring training record failed with an error upon submission.

Missing receipt icon in mileage claims

Issue resolved where the receipt download icon did not appear when viewing mileage claims, despite receipts being attached.

Benefits button hidden when pay/benefits restricted

Issue resolved where restricting Pay/Benefits access incorrectly hid the entire Pay/Benefits button instead of just the section.

Salary history not visible for HR users

Issue resolved where HR users with "None Hidden" access still could not view Salary History, despite Job History being visible.