Release Notes

Release Date: 15.05.25

Version: 23.20.0

Enhancements

New Continuous Workflow Types for Time Off

- Following customer feedback, we have added two new types of Continuous Workflows for use with Time Off.

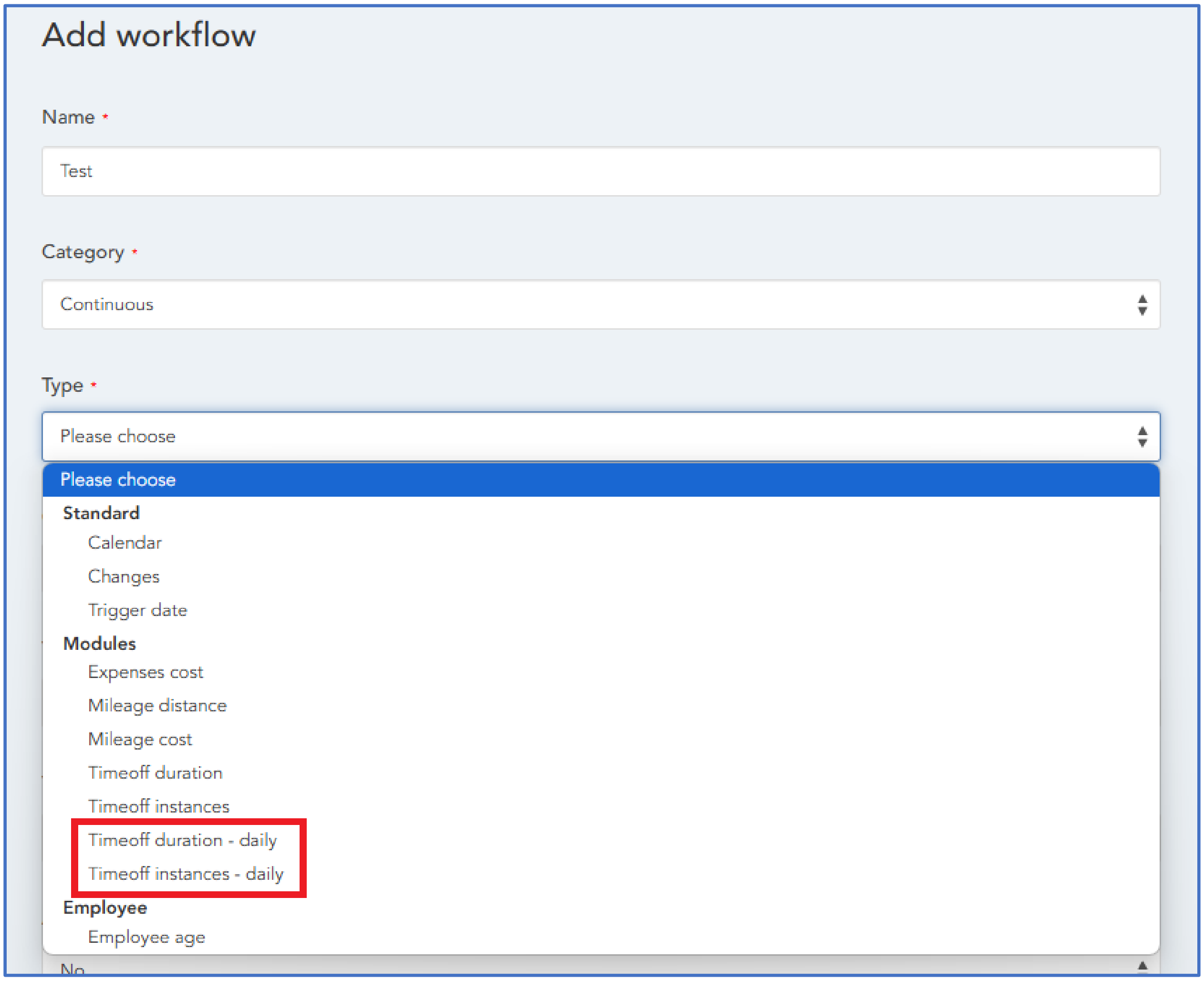
- These workflows can be used by choosing the options Timeoff duration – daily or Timeoff instances – daily when adding a workflow.

- These workflows will trigger when:
    - An End Date is added for an Open-Ended Time Off Request, and
    - The End Date is any past day before the Start Date.

- They are intended to use for unplanned absences such as Sickness where a process needs to follow when the employee returns to work.

- These workflows share the same settings as the existing Timeoff duration and Timeoff instances Continuous Workflow Options and can therefore be triggered only if the absence has been of a specific duration, or there have been a specific number of absences in a given period.

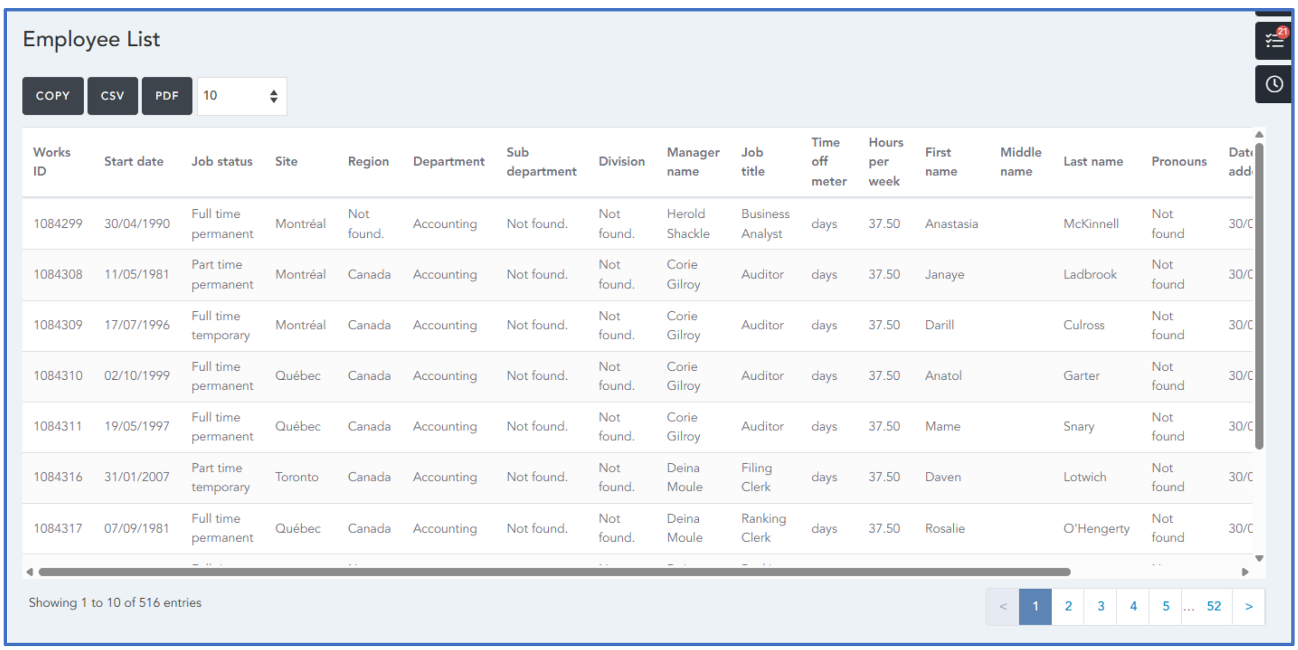
- Usage example:
    - On 1st May 2025 Mark informs his manager Louise that he is unwell and it is unclear when he will return to work.
    - Louise adds an instance of the 'Sickness' type for Mark without entering an end date (an 'Open-Ended' request).
    - On 7th May 2025 Mark returns to work.
    - Louise adds an end date of 6th May 2025 to the previously entered instance of 'Sickness'.
    - A workflow of this type, associated with the 'Sickness' Time Off Type, would trigger immediately on the entry of that end date.



Screenshot: Showing the new options for Workflow Type

Freeze titles when viewing reports

- Previously, scrolling through long reports caused column headers to disappear, making it hard to relate data to the correct columns.
- This enhancement ensures that column headers remain visible while scrolling, allowing users to continuously reference the data without losing track of the column names.
- Users can now view long and multi-column reports using vertical and horizontal scrolling without losing context. The headers remain fixed even across multiple pages and after report edits, ensuring consistent visibility.
- The feature works seamlessly with expanded or collapsed left-hand menus and the ‘Group by Field’ setting, maintaining header visibility in all report configurations.
- Whether a report has minimal or maximum rows and columns, header freezing works seamlessly, offering a smooth experience with large datasets. Additionally, the enhancement ensures smooth scrolling, fast load times, and is supported across major browsers and screen resolutions


Employee List

COPY CSV PDF 10

Works ID	Start date	Job status	Site	Region	Department	Sub department	Division	Manager name	Job title	Time off meter	Hours per week	First name	Middle name	Last name	Pronouns	Date add
1084299	30/04/1990	Full time permanent	Montréal	Not found.	Accounting	Not found.	Not found.	Herold Shackle	Business Analyst	days	37.50	Anastasia		McKinnell	Not found	30/C
1084308	11/05/1981	Part time permanent	Montréal	Canada	Accounting	Not found.	Not found.	Corie Gilroy	Auditor	days	37.50	Janaye		Ladbrook	Not found	30/C
1084309	17/07/1996	Full time temporary	Montréal	Canada	Accounting	Not found.	Not found.	Corie Gilroy	Auditor	days	37.50	Darill		Culross	Not found	30/C
1084310	02/10/1999	Full time permanent	Québec	Canada	Accounting	Not found.	Not found.	Corie Gilroy	Auditor	days	37.50	Anatol		Garter	Not found	30/C
1084311	19/05/1997	Full time permanent	Québec	Canada	Accounting	Not found.	Not found.	Corie Gilroy	Auditor	days	37.50	Mame		Snary	Not found	30/C
1084316	31/01/2007	Part time temporary	Toronto	Canada	Accounting	Not found.	Not found.	Deina Moule	Filing Clerk	days	37.50	Daven		Lotwich	Not found	30/C
1084317	07/09/1981	Full time permanent	Québec	Canada	Accounting	Not found.	Not found.	Deina Moule	Ranking Clerk	days	37.50	Rosalie		O'Hengerty	Not found	30/C

Showing 1 to 10 of 516 entries

< 1 2 3 4 5 ... 52 >

Screenshot: Showing Horizontal and Vertical scrollbar to the table

Improved Error Messaging on Employee Competencies

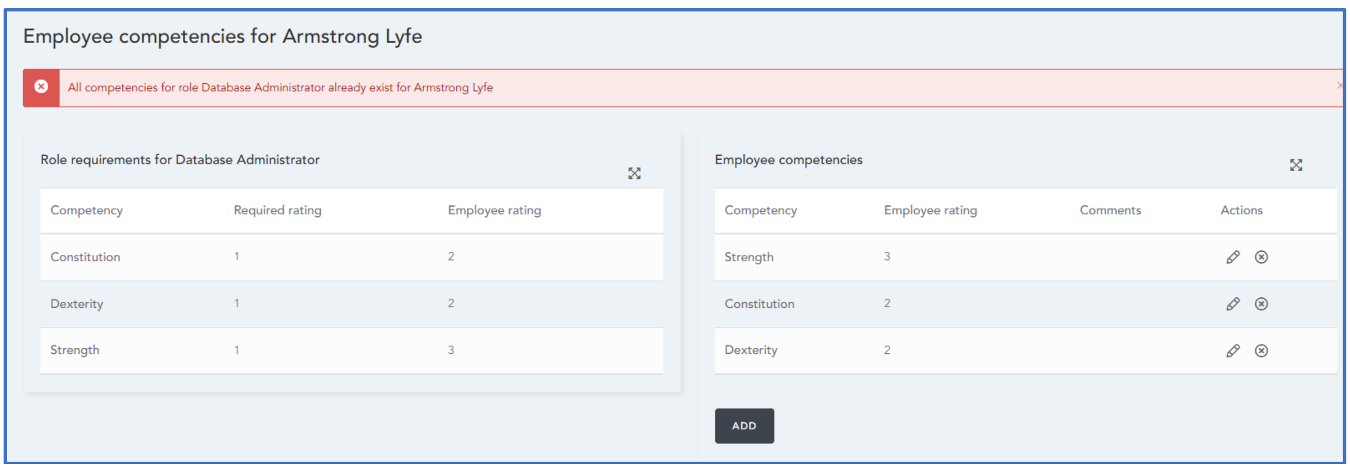
- Following customer feedback, we’ve enhanced the error message that appears when all competencies are already assigned and the 'Populate' button is clicked, aiming to reduce confusion and enhance the user experience.

- Previously, a generic error ("There is an error") was shown when all role competencies were already assigned. This has been updated to a clear message,
"All competencies for role [Role Name] already exist for [Employee Name]."

- This change applies to Admins, Managers, and HR users.

- The error message can be dismissed by clicking the Cancel (X) icon or by using the Back button on the Employee Competencies page.

- When one or more competencies are deleted, clicking the 'Populate' button restores the missing competencies and displays a success message. The error message only appears if all competencies are already populated.



Screenshot: Showing error message

Improved Validation for Employee Competency Values

- Following customer feedback, we have made improvements to ensure only whole numbers (1, 2, 3, etc.) can be added or edited for competencies. Decimal values will trigger an error message on Save to prevent rounding and maintain accuracy.

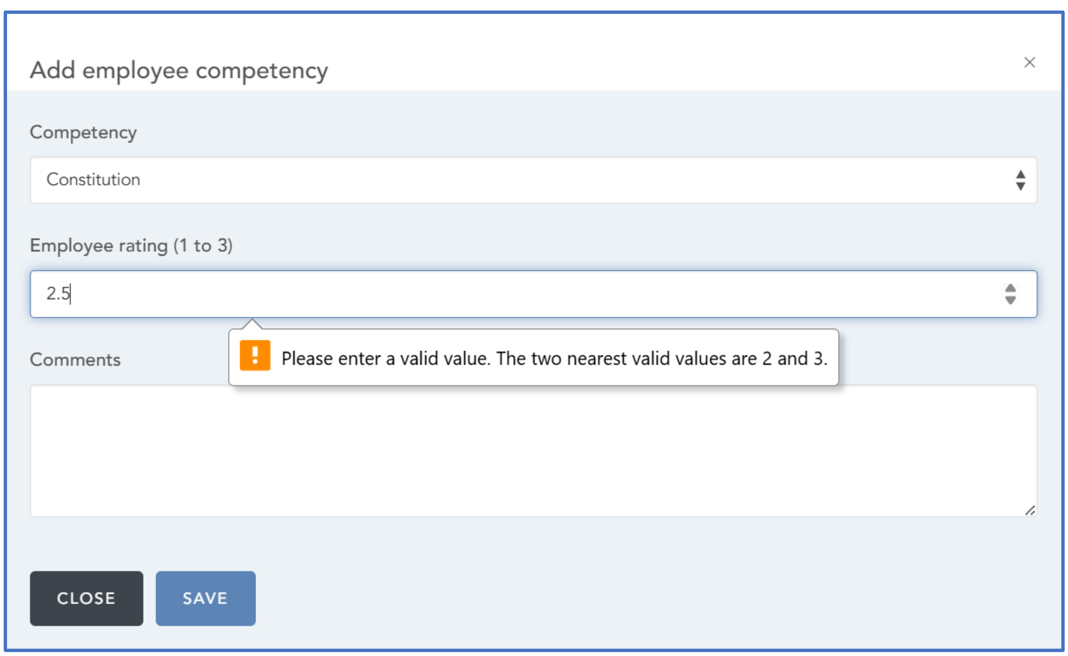
- When a decimal value is entered while editing a competency, the system will display an error message: "Please enter a valid value. The two nearest valid values are <Lower Value> and <Upper Value>."

- This replaces the previous behaviour where decimal values were rounded (e.g., 2.4 became 2, 2.5 became 3), causing inconsistencies.

- This change applies to Admins, Managers, and HR users and can be found on the following pages:

HR > Data Management > Job Role > Edit > Add/Edit Competency
(Decimal values were previously accepted without validation, and the system would round them upon submission.)

People > Employees > Employee Competencies > Edit Competency 2024
(Decimal values were saved but rounded upon refresh, causing discrepancies.)



Screenshot: Showing error message

Improved planner performance by showing fewer records initially.

- Following customer feedback, we have improved the performance of the Planner feature by limiting the number of employee records loaded initially.
- The Planner now loads only the first 10 employee records on page load, with additional records loading dynamically as the user scrolls.
- This dynamic loading approach aligns with the method used in the Employee Tile View for consistency across modules.
- When filters are applied, only the first 10 matching employee records are displayed initially, with more loading as you scroll.
- The same behaviour applies when navigating months, clicking the “Previous Month” or “Next Month” buttons will load the first 10 records for the selected month, with additional records loading on scroll.
- These enhancements significantly improve response times, especially for organisations with a large number of employees.

Revised label and added tooltip for ‘Display in Summary’

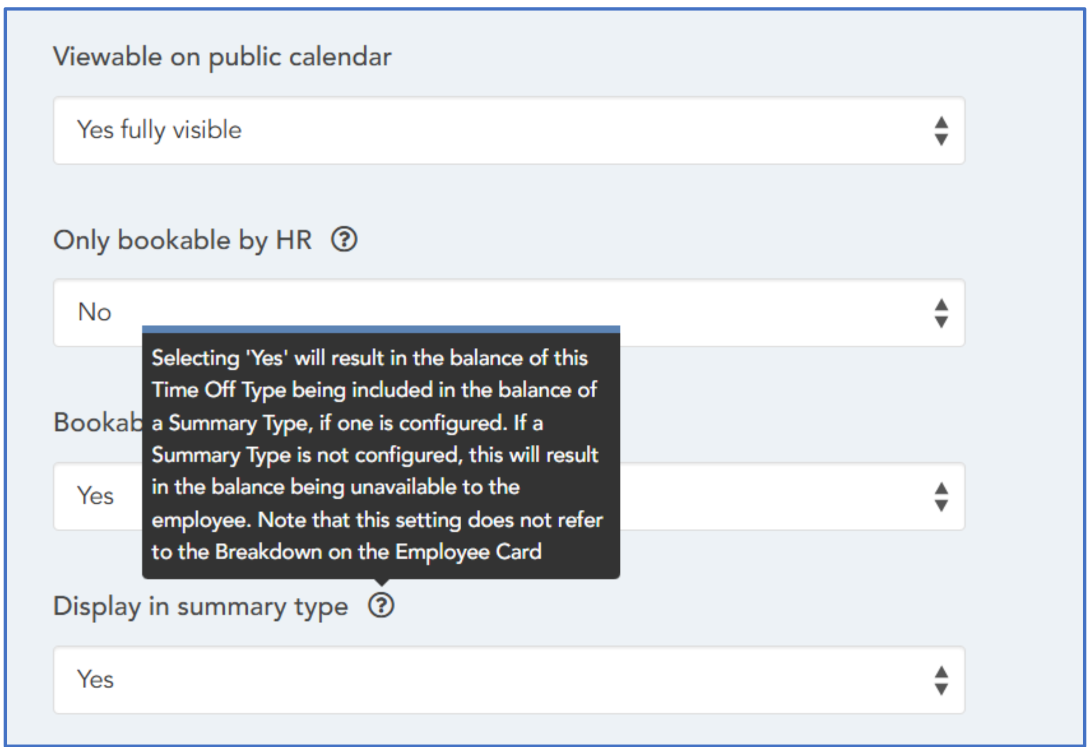
- Following customer feedback, we’ve renamed the “Display in Summary” setting to “Display in Summary Type” on the Time Off Type add and edit pages.
- This setting is available at:

  Administration > HR > Time Off Management > Time Off Types > Add / Edit

- We’ve added a tooltip to explain the setting more clearly:

  "Selecting 'Yes' will result in the balance of this Time Off Type being included in the balance of a Summary Type, if one is configured. If a Summary Type is not configured, this will result in the balance being unavailable to the employee. Note that this setting does not refer to the Breakdown on the Employee Card."

- These changes are designed to make the setting easier to understand and use.



Screenshot: Showing Revised label and added tooltip

Improved Navigation Using Back Button in Employees Module

- Following customer feedback, we have corrected the behaviour of the Back button in the Employee module to improve navigation consistency, allowing users to seamlessly continue browsing employee records without being redirected to the homepage.

- Previously, clicking the Back button from an employee card redirected users to the Natural HR homepage, causing disruption. Now, when users click Back, they are returned to their previously selected Employee module view (Card, Table, or Tile).

- In Card View:
  - If "Default card" in Display Settings is set to "None", users are returned to the card view with no employee selected.
  - If set to "First employee", users are returned to the card view with the first accessible employee selected.

- In Table View:
  - Users are returned to the Employee Table view.

- In Tile View:
  - Users are returned to the Employee Tile view

Implement Social Profanity filter for Social Recognition Posts

- Following customer feedback, we've extended the profanity filter to the "Recognise a Colleague" section, ensuring consistent and proactive content moderation across modules, while keeping users informed and enhancing overall experience.

- If Social Stream is enabled, a new text box labelled Profanity List for Recognise a Colleague has been added to allow admins to define recognition-specific flagged words under the path:

  Company > Settings > Social > Social Settings

- The existing textbox has been relabelled as Profanity List for Social Stream under the same page.

- Posts in 'Recognise a Colleague' containing flagged words will now be flagged and queued for moderation and the user's submitting posts with moderated words will see a message:

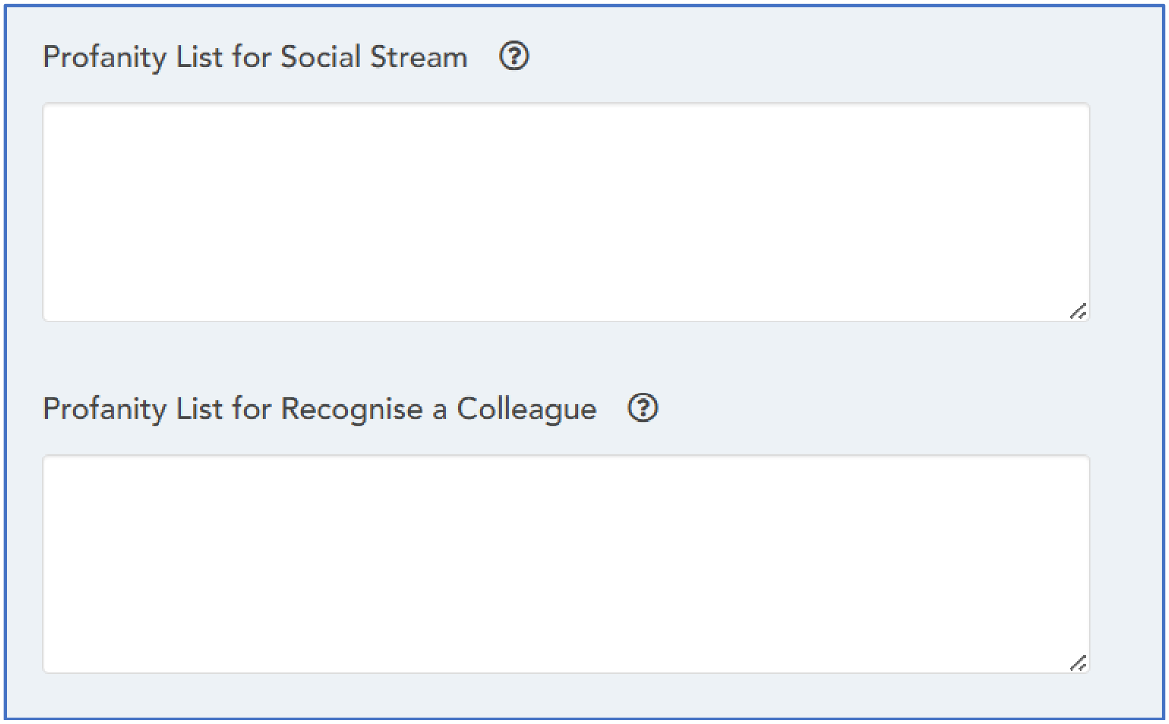
  "Your post has been queued for moderation. Please check back later."

- Admins and HR users will receive email notifications for flagged posts, which can then be reviewed, approved, or rejected.

- Approved posts are published immediately in Recognise a Colleague, while rejected posts remain hidden.

- The profanity filters for Social Stream and Recognise a Colleague work independently based on the lists configured under the path:

  Administration > Company > Settings > Social > Social Settings



Screenshot: Showing Profanity List for Recognise a Colleague and Social Stream

Mileage Claim ID displayed in Mileage Module

- Following customer feedback, we've added an option to display the Mileage Claim ID in the Mileage module to support data import and retrieval processes.

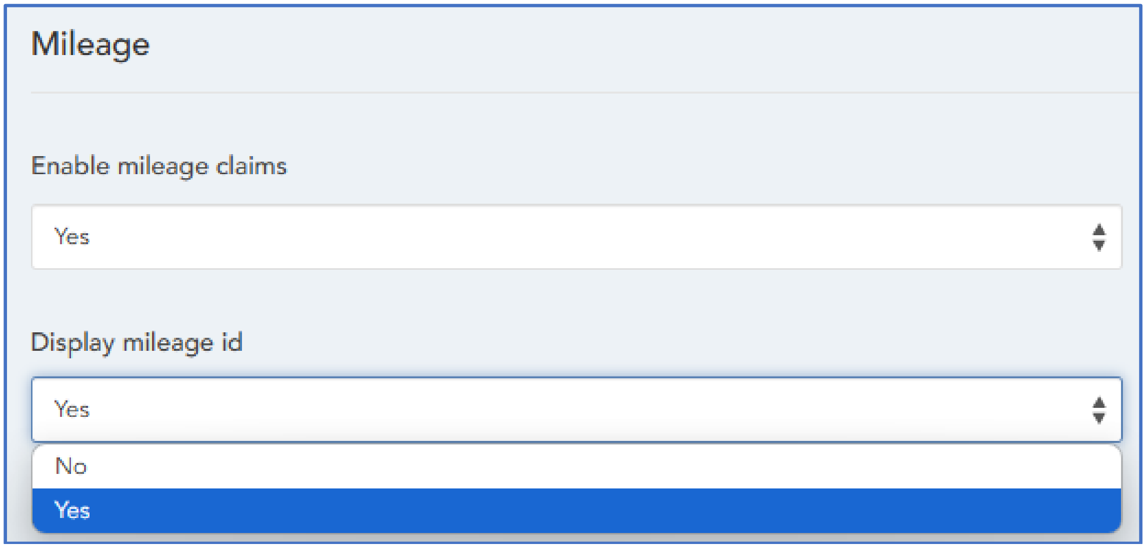
- A new dropdown setting, Display Mileage ID column in Mileage Claim has been introduced. The default state is set to No, unless changed by an administrator. This setting can be found under:

  Administration > Company > Settings > Expenses > Expense Settings > Mileage

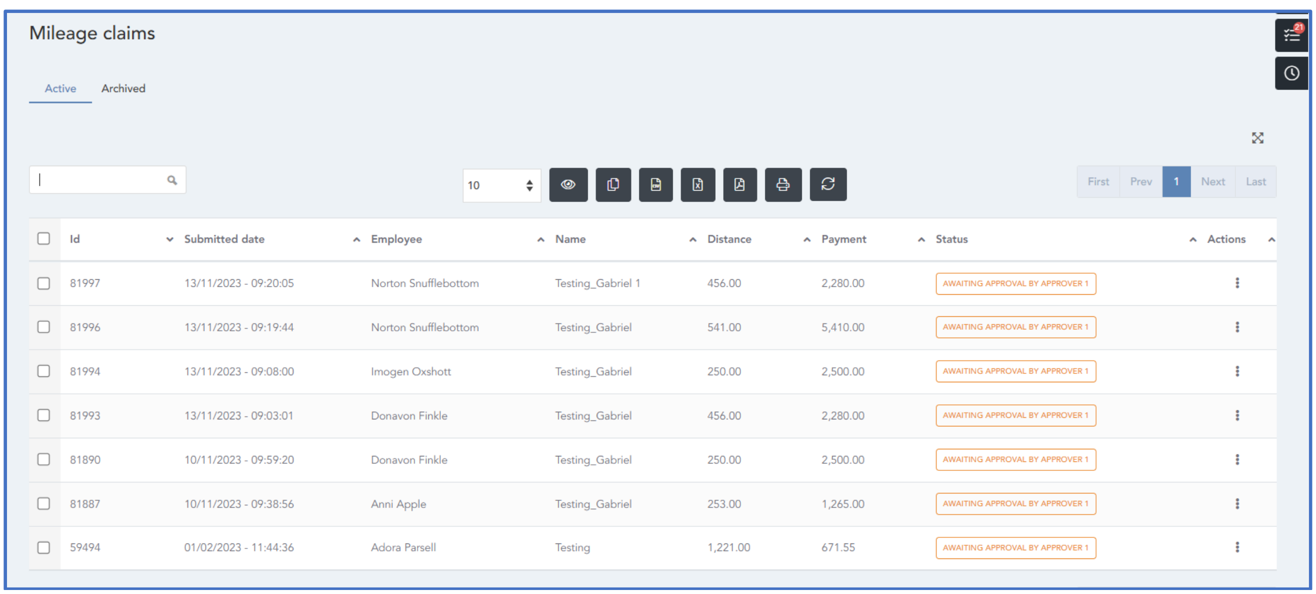
- Only Administrators can enable or disable the display of the Mileage Claim ID on the Finance > Mileage > Active and Archived tabs.

- When enabled, the ID column appears as the first column and includes filtering functionality and column visibility options.

- Administrators, HR, and Finance users with the right permissions can view the column when enabled, ensuring better data accessibility without impacting performance or usability.



Screenshot: Showing "Display mileage ID" dropdown



Id	Submitted date	Employee	Name	Distance	Payment	Status	Actions
81997	13/11/2023 - 09:20:05	Norton Snufflebottom	Testing_Gabriel 1	456.00	2,280.00	AWAITING APPROVAL BY APPROVER 1	
81996	13/11/2023 - 09:19:44	Norton Snufflebottom	Testing_Gabriel	541.00	5,410.00	AWAITING APPROVAL BY APPROVER 1	
81994	13/11/2023 - 09:08:00	Imogen Oxshott	Testing_Gabriel	250.00	2,500.00	AWAITING APPROVAL BY APPROVER 1	
81993	13/11/2023 - 09:03:01	Donavon Finkle	Testing_Gabriel	456.00	2,280.00	AWAITING APPROVAL BY APPROVER 1	
81890	10/11/2023 - 09:59:20	Donavon Finkle	Testing_Gabriel	250.00	2,500.00	AWAITING APPROVAL BY APPROVER 1	
81887	10/11/2023 - 09:38:56	Anni Apple	Testing_Gabriel	253.00	1,265.00	AWAITING APPROVAL BY APPROVER 1	
59494	01/02/2023 - 11:44:36	Adora Parsell	Testing	1,221.00	671.55	AWAITING APPROVAL BY APPROVER 1	

Screenshot: Showing "ID" column in Active Tab

Fixes

Performance : Goals added via Self Service not shown on Homepage by default

Issue resolved where, in environments where ‘Show goal progress on employee home screen’ was set to ‘Yes’, Performance Goals added by Employees in Self Service were not set to Display on the Homepage. Following this change, if this option is enabled, Goals created in Self Service will be set to Display on the Homepage by default.

Reporting : Aggregates do not Display in Reports, or show as zero.

Issue resolved where an aggregate applied to a Report in Report Builder would not appear in the generated report or, would appear as zero, depending on the way the report was configured.

Time Off : Time Off Type dropdown doesn’t collapse after choosing a Time Off Type in Self Service

Issue resolved where, if an Employee used the Request Time Off button and then chose a Time Off Type from the drop-down menu, that drop-down would remain expanded, obscuring the view of the other available options (Start Date, End Date, etc.)

Time Off : Time Off Types used for Time Off Trades allow employees to overbook

Issue resolved where, in environments where a Time Off Type is used for Trades and has ‘Allow employees to request more days than allowance’ set to ‘No’, Employees were nonetheless able to request Time Off that exceeded their available allowance of the type.

Time Off : Incorrect Timestamp added to Allowance History records when using ‘Update Allowances’

Issue resolved where Allowance History records created by making changes on the ‘Update Allowances’ page had an incorrect timestamp for the change.

Training : Incorrect banner text displayed when Declining a Training Request

Issue resolved where, if a Training Request was Declined, the resulting banner incorrectly stated that the request had been successfully Approved.

Webhook : Webhooks for the employee.update event not fired when Employee is made a Leaver

Issue resolved where, in an environment with an employee.update webhook configured, these webhooks would not fire when an Employee was made a leaver.

Workflows : New Employee Status tag not populating in Workflow emails

Issue resolved where, if the [Employee_New_Employee_Status] tag was used in a Workflow Email in a Job Change Approval Workflow, the email would not be properly populated with the Employee's new Status.

Workflows : Extraneous backslashes displayed in Workflow Step Names for Action steps

Issue resolved where, if the name of an 'Action' workflow step contained an Apostrophe character, an extraneous Backslash character would be displayed before the Apostrophe when actioning the step.

Timesheets : Managers unable to Approve Timesheets when using the system default Approval process

Issue resolved where, in environments using the system's Default Approval Process for Timesheets, users were unable to Approve or Decline Timesheets for Employees. 2024

Workflows : Workflow Steps set to trigger based on a Date do not consider the Timezone in Localisation

Issue resolved where workflow steps set to trigger based on a date (eg "Last working day") did not consider the Timezone set in Localisation, and therefore could Trigger on an unexpected date.

Recruitment : Flagged Candidates not Flagged when applying using a Custom Application Form

Issue resolved where Candidates who had previously been Rejected using a Flagged Rejection Reason and who subsequently applied using a Custom Application Form were not Flagged for their new Application.

Workflows : Issues with Workflows having 'Notify Only' steps after a 'Require approval' step

Issue resolved where, 'Notify Only' Workflow steps were still triggering after a workflow was rejected and marked as ended. These notifications will no longer be sent once a workflow terminates early due to rejection.

Administration : Email not received when requesting a Document Backup

Issue resolved where some Administrator users requesting a Documents Backup did not receive the email containing the link to download their Documents. The email is now correctly sent.