

Release Notes

Release date: 26.06.25

Version: 23.23.0





Enhancements

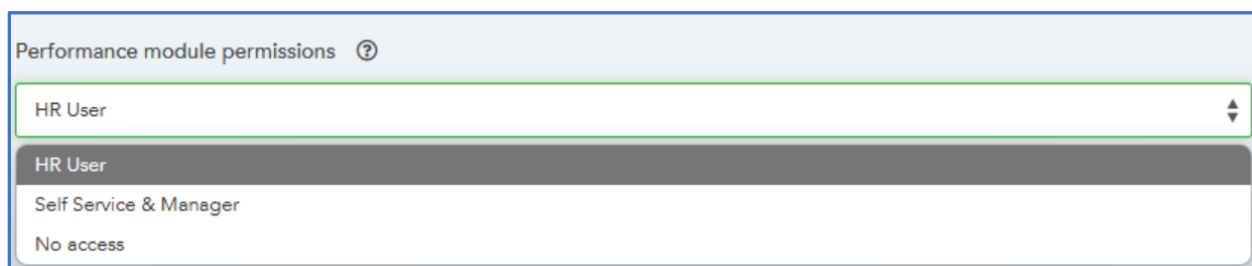
Changes to HR User Restrictions for Performance

- Following customer feedback, we've added a new '**Performance module permissions**' setting that lets Admin and HR users control HR user access without using Module Templates. HR users can now be set to see only their own and their reports' Performance data.
- A new dropdown field titled 'Performance module permissions' is now available when adding or editing HR users with options:
 - **HR User** – Full access to the Performance module (Default)
 - **Self Service & Manager** – Limited access to personal and downline data only
 - **No access** – Removes access entirely
- The selected value also appears as a read-only field in the **User Permissions Audit** page:

Admin > Company > User Permissions Audit

- A new field **Performance module permissions** is available in the Users data source in **Report Builder**. This returns one of the selected values: **HR User**, **Self Service & Manager**, or **No access**.
- Performance module access is now determined by this setting (if the module is enabled and not restricted by a Module Template)
- Self Service > My Development
 - **HR User:** Full access to all menu items for the user's own data
 - **Self Service & Manager:** Limited access for the user's own data (same as Employee/Manager view)
 - **No access:** My Development menu is hidden
 - **Menu items include:** My Competencies, My Goals, My Reviews, My Warnings

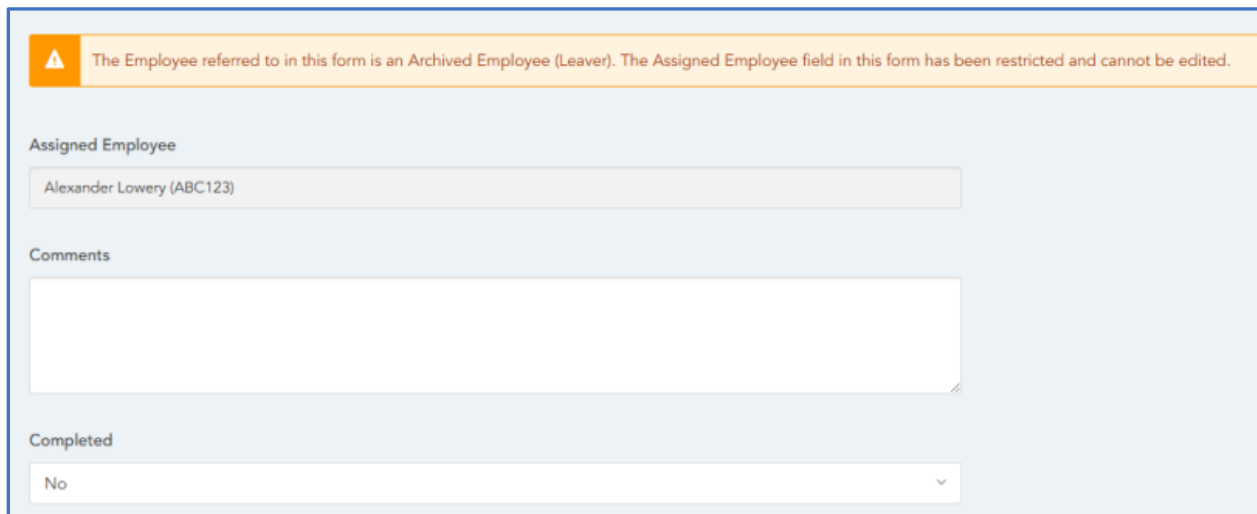
- **Main Menu > Performance:**
 - **HR User:** Full access with visibility based on HR user restrictions
 - **Self Service & Manager:** Only direct reports are visible (Manager context)
 - **No access:** Menu is hidden
 - **Menu items include:** 360 Feedback, 9 Box Grid, Goal Library, Performance Improvement Forms, Programs, Review Forms, Schedule a Meeting, Warnings.
- **Employee Card > Performance Icons**
 - **HR User:** All applicable performance icons are shown
 - **Self Service & Manager:** Icons shown only for employees in the user's downline
 - **No access:** Icons are hidden
 - **Icons includes:** Core Details, Grievances, Development (Reviews, Goals, Competencies, Development roles, Succession)



Screenshot: Showing the Performance module permissions available when adding or editing a HR User

Changes to Assigned Field Behaviour

- To protect the integrity of form data, we have made changes to the behaviour of the Assigned Employee field in forms, where the **Assigned Employee** is an Archived Employee or a Leaver.
- These changes affect **Performance Review**, **Performance Improvement** and **Other form** types.
- When a form of these types is accessed and the Assigned Employee on the form is an Archived Employee (or a Leaver) then the following changes will occur:
- The Assigned Employee field becomes read-only and cannot be changed.
- A warning banner has been added which explains why this change has happened.
- This change protects the integrity of Form Data by ensuring that the form remains associated with the Archived Employee (or Leaver) and cannot be inadvertently associated with any other employee.

A screenshot of a web form interface. At the top, an orange warning banner with a triangle icon contains the text: "The Employee referred to in this form is an Archived Employee (Leaver). The Assigned Employee field in this form has been restricted and cannot be edited." Below the banner, the form has a light blue background. The first section is labeled "Assigned Employee" and contains a read-only text field with the value "Alexander Lowery (ABC123)". The second section is labeled "Comments" and contains a large, empty text area. The third section is labeled "Completed" and contains a dropdown menu with the value "No" selected.

Screenshot: Showing the additional messaging and changes to the Assigned Employee Field



Hotfixes

Time Off : Time Off Trade types prevent other Time Off types from being requested

Issue resolved where, assigning a Time Off Trade type to an Employee caused other Time Off Types to disappear from the booking modal in Self Service and Time & Attendance. Now, all Time Off Types configured as Bookable by Employees will now appear correctly in Self Service and the Time & Attendance module.

Time Off : Error Message when editing the duration of Time Off Requests for Types with accents

Issue resolved where, Time Off Types containing accented characters triggered an 'Insufficient Allowance' error when editing the Duration field during booking. This fix ensures that if an Employee has a valid allowance, editing the duration will not result in an error across both Self Service and Time & Attendance.



Fixes

Announcements : An error message is displayed if the 'Go Live' date is set in the future.

Issue resolved where, a user creating a new Announcement with a future Go Live Date and no Expiry Date encountered an incorrect validation error. The system will now allow Announcements to be created without an Expiry Date, provided the Go Live Date is in the future.

Bulk Upload: Bulk Uploading Histories with an apostrophe in Change Reason causes an error.

Issue resolved where, using a Change Reason containing an apostrophe (') during Employee History bulk upload resulted in a system error. The system now successfully handles Change Reasons with apostrophes during bulk upload without generating an error.

Report Builder: Table Report on 'Employee Development' Shows No Data Despite Fields Selected.

Issue resolved where, Employee Development Records added via Bulk Upload were not appearing in reports using the Employee Development data source. All bulk uploaded development records will now be correctly displayed in reports as expected.

Bulk Upload : Bulk Uploader for Job Grades Requires Extra Fields and Displays Incorrect Error Message.

Issue resolved where, there were inconsistencies in the Job Grades Bulk Upload tool. Previously, multiple fields were incorrectly marked as mandatory, and error messages were vague. Now, only Job Grade is required, aligning with the front-end requirements and error messages are updated to provide more accurate guidance.

Bulk Upload : TOIL values bulk upload incorrectly has Start and End date as Optional.

Issue resolved where, an issue in the TOIL Values Bulk Upload where Start Date and End Date were incorrectly marked as optional. These fields are now mandatory to align with the front-end validation in Time Off In Lieu setup. This ensures that TOIL allowances are accurately applied during bulk upload and consistent with manual entry requirements.



Employees : Variable hours override tick box doesn't show as ticked when going to the change page.

Issue resolved where, the Variable Hours Override tick box on the Change page did not reflect the value selected on the Benefits page. If left unticked and submitted, it would unintentionally override the existing setting. The system now properly retains and displays the correct override status to prevent this problem.

Employee : Employees - Role competency description doesn't appear.

Issue resolved where, the Competency Description did not display when editing a Competency in the Employee Card. The Description now correctly appears during Competency edits.

Forms : Application forms with multiple boxes have an alignment issue.

Issue resolved where, multi-line Answer Boxes on Standard and Custom Application Forms were misaligned. Now, all answer lines display correctly aligned within the form.

Bulk Update : Bulk update feature for Salary changes errors in specific circumstances.

Issue resolved where, using the Salary option in Bulk Update, with a Change Reason associated with a Change Approval Workflow, caused an error. Salary updates with Workflow triggers now process successfully.

Recruitment : HR users are unable to delete Candidates via the actions menu or candidate card.

Issue resolved where, HR users were unable to delete candidates via the Action Menu or Candidate Card. The Delete option is now correctly displayed in both views.

Reporting : Default not being applied correctly for calculated salary fields in reporting.

Issue resolved where, Calculated Salary fields in Reporting used incorrect default values when no working days were entered. Now defaults to 37.5 hours/week × 52 weeks for Annualised Salary calculations.



Reporting : Starting balance (YTD) in reporting is showing a higher value than it should at the start of the year.

Issue resolved where, the Starting Balance (YTD) field in Time Off reporting showed inflated values at the start of the holiday year. Now displays accurate balances based on configured Time Off Year settings.

Total rewards : Total Rewards page Benefits and Salary do not match when converting the value.

Issue resolved where, the Salary and Benefits values on the Total Rewards page used inconsistent conversion logic when no Working Days were entered. Now both use the default conversion of 37.5 Hours per Week × 52 Weeks for consistent and accurate display.

Risks : Compliance percentage doesn't update correctly for expired or pending requests.

Issue resolved where, on the Risk Profile page where Pending or Expired Training and Documents were incorrectly counted as Compliant, resulting in inaccurate Compliance Percentage. Now, only Current (Green) items contribute to the compliance score, ensuring accurate risk visibility.

Documents : Downloaded Template Letter Displays {pard\par} Instead of Address Content.

Issue resolved where, the following tags displayed formatting artifacts such as {pard\par} in generated documents: [e_address_compete], [kpi_goal], [dev_goal], [dev_goals_extended], and [kpi_goals_extended]. These tags now render cleanly with correct formatting.

Time Off : Affected by Time Off Allowance Accrual isn't taken into account for Length of Service types.

Issue resolved where, Length Of Service Time Off Types were still affected by Allowance Accrual Rules, even when "Affected By Time Off Allowance Accrual" was set to 'No'. The setting now functions as expected.

Time Off : Incorrect Allowance History records being created.

Issue resolved where, updating an individual Time Off Type allowance incorrectly generated Allowance History Records for Pool Time Off Types (e.g., Annual Holiday Entitlement), even when those allowances were not modified.



Timesheets : Timesheet Confirm page incorrect displayed if the Timesheet included multiple entries.

Issue resolved where, the Timesheet Submission Page would automatically scroll to the middle when loading or submitting timesheets with multiple entries. The page now correctly remains at the top, displaying the Success Banner clearly upon submission.

Workflows : Steps set to trigger on last working day are triggering based on UTC time rather than localisation.

Issue resolved where, Workflow Steps configured to trigger on the Last Working Day were being executed based on UTC Time instead of the time zone set in Localisation Settings. This fix ensures that steps in both Task and Continuous workflow types now trigger as per the Main Admin's Local Time Zone, preventing early step execution in regions behind UTC.