

Release Notes

Release date: 10.07.25

Version: 23.24.0



Employee - Personal Details			
⊕ Employee ID	⊕ Works ID	⊕ Title	⊕ First name
⊕ Known as	⊕ Middle name	⊕ Surname	⊕ Full name
⊕ Full name (inc Works ID)	⊕ Initials	⊕ Pronouns	⊕ National Insurance
⊕ Address	⊕ Address 2	⊕ Town	⊕ County
⊕ Post Code	⊕ Country	⊕ Address - single line exc co...	⊕ Address - single line inc country
⊕ Address - multi line exc cou...	⊕ Address - multi line inc cou...	⊕ Driving license	⊕ Skills
⊕ Education	⊕ Work experience		

Screenshot: Showing 'Driving License Number' field added under 'Employee - Personal details' section



Ability to Archive Training Courses

- Following customer feedback, we've introduced an **Archive** feature in the **Training module** to allow Admin and HR users to cleanly separate outdated training courses from the active training catalogue without deleting them.
- The **Course Library** now includes two tabs: **Active** and **Archived**, enabling users to switch views and manage training visibility. All existing training courses will appear under the **Active** tab by default.
- Courses can be Archived or returned to Active status using both **single and bulk actions**. A confirmation message will appear before changes are made, and a success banner will confirm the number of courses archived or returned.
- Each tab includes checkboxes for individual or bulk selection, and a **Bulk Action** dropdown (at the bottom-right) provides options to **Archive** (from Active tab) or **Return** (from Archived tab).
- Archived courses retain all associated data and are removed from the active view, but remain editable with actions such as **Edit**, **Delete**, **Attendees**, and **Documents** available.
- In **Employee Self Service**, only **Active** courses are visible when:
 - Requesting training from Self Service > My Development > My Training > Request Training
 - Viewing the course library from Self Service > My Development > My Training > Course Library
- When accessed via Self Service, the **Archived tab is not shown**, ensuring employees only see relevant, active training options.
- In terms of user impact, this enhancement improves the manageability of the training course library, keeps the employee view clean and up-to-date, and ensures historic course data remains accessible when needed.

The screenshot shows the HRwize Training Courses interface. At the top, the breadcrumb trail is 'Home / Training / Courses / Courses archived'. The page title is 'Training Courses'. Below this, there are two tabs: 'Active' and 'Archived', with 'Archived' being the selected tab. A search bar is present on the left. In the center, there is a dropdown menu set to '10' and a row of seven green action icons. On the right, there is a pagination control showing 'First', 'Prev', '1' (selected), 'Next', and 'Last'. Below these elements is a table with the following columns: Course Name, Provider, Location, Days, Cost, Mandatory Training, Restricted, and Actions. The table contains one record: 'Spanish 101' by 'Languages Inc' in 'London' for '1,000' days at a cost of '450.00 per delegate'. The 'Mandatory Training' and 'Restricted' columns for this record contain 'NO'. Below the table, it says 'Showing 1 to 1 of 1 records'. At the bottom left is a green 'BACK' button. At the bottom right, a 'Bulk actions' dropdown menu is open, showing options: 'Please choose', 'Return', and 'Please'. A vertical sidebar on the far right contains several icons for navigation and user management.

Home / Training / Courses / Courses archived

Training Courses

Active Archived

10

First Prev 1 Next Last

<input type="checkbox"/>	Course Name	Provider	Location	Days	Cost	Mandatory Training	Restricted	Actions
<input type="checkbox"/>	Spanish 101	Languages Inc	London	1,000	450.00 per delegate	NO	NO	

Showing 1 to 1 of 1 records

First Prev 1 Next Last

BACK

Bulk actions

- Please choose
- Return
- Please

Screenshot: Showing 'Archived' tab, Bulk action 'Return' added under Training courses



Add Comments Field to Job Benefits Changes

- Following customer feedback, we've introduced a new **Comments** field on the **Employee Benefits** page, allowing Admin and HR users to include extra details when updating an employee's benefit information.
- The **Comments** field appears below the Change Date and is optional. Users can choose to leave a comment or submit the form without one. This change helps capture useful context when benefits are updated.
- If the **Change Reason** used has **Record Histories?** = **Yes**, the comment will be saved and shown in the Employee's History. If **Record Histories?** = **No**, the comment won't be saved. This matches how other benefit history records work.
- Comments appear with the records in history, and no changes have been made to how history works.
 - For Time Off Allowance changes → Employee Allowance History
 - For Salary, Working Pattern, and Benefits changes → Employee Salary History
- Saved comments are visible but cannot be edited later. Older records (from before this update) will not show any comments.
- The Comments field accepts long text, special characters, and line breaks. Leaving it blank won't cause any errors.
- In terms of user impact, this change gives Admin and HR users better visibility into why benefit changes were made, helping with future reference.

Change reason *

✖ This field is required.

Change date *

✖ This field is required.

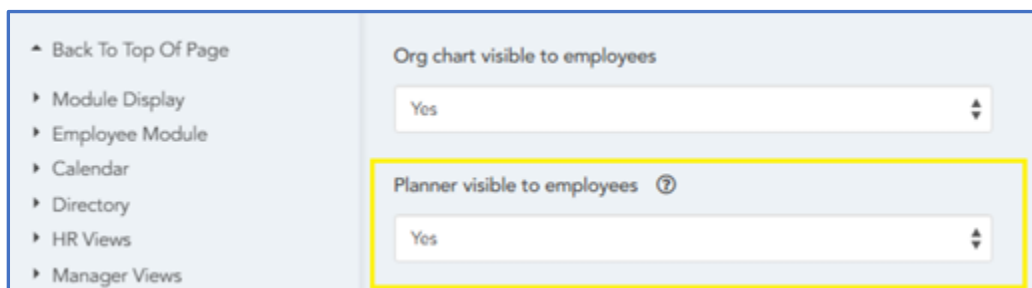
Comments

Meter ▲	Reason ▲	Comments ▲	ID ▲
days	26	This comment should save in the history	10236
days	26	This comment should save in the history	10237
days	26		2869

Screenshots: Showing Comments field, and comments are displayed in the corresponding history record.

Changes to Planner Visibility

- To improve consistency and avoid confusion, we've updated the **Planner view** logic so that employee and manager access works as expected based on system settings.
- Previously, **Employees** could see all colleagues in the Planner, while **Managers** were limited to seeing only their direct reports or downline, depending on their preference settings. This resulted in employees having greater visibility than managers, which led to several support requests.
- With this update, access to the **Planner** is now controlled by the system setting: "**Planner visible to employees**".
- When **Planner visible to employees = Yes**:
 - All users - both **employees and managers** - can see the **entire organisation** in the Planner.
 - Organisational depth preferences for managers are ignored in this case.
- When **Planner visible to employees = No**:
 - **Employees** cannot access the Planner.
 - **Managers** can access the Planner, but their view is based on their **Organisational Depth** preference:
 - My direct reports only → Planner shows only direct reports.
 - My entire downline → Planner shows the full downline.
- In terms of user impact, this change ensures consistent visibility rules across the business. If employees are allowed to view the Planner, everyone sees everyone. If not, visibility for managers is limited according to their settings.



The screenshot shows a settings interface with a sidebar on the left and a main content area on the right. The sidebar contains a list of settings: 'Back To Top Of Page', 'Module Display', 'Employee Module', 'Calendar', 'Directory', 'HR Views', and 'Manager Views'. The main content area has two settings: 'Org chart visible to employees' with a dropdown menu set to 'Yes', and 'Planner visible to employees' with a dropdown menu set to 'Yes'. The 'Planner visible to employees' setting is highlighted with a yellow border. A question mark icon is next to the 'Planner visible to employees' label.

Screenshot: Showing planner settings

Planner														
06/2025														
	01 Sun	02 Mon	03 Tue	04 Wed	05 Thu	06 Fri	07 Sat	08 Sun	09 Mon	10 Tue	11 Wed	12 Thu	13 Fri	14 Sat
Alison Key (EMP000197)														
Amit Hr														
Amy Stewart (EMP000083)														
Jo Moreno (EMP000118)														

Screenshot: Showing planner view



Fixes

Reporting: Accrual Rule field shows as 'Not Found' for Employees with Length of Service (LOS) rule

Issue resolved where, the Accrual Rule field showed as 'Not Found' for employees with an assigned Length Of Service (LOS) type in reports. The field now displays correctly. The deprecated Employee Accrual field is removed from selection and hidden in existing reports to avoid errors.

Reporting: Fields fail to load when creating Reports in systems without Dashboards

Issue resolved where, users in systems without dashboards or with the Analytics module disabled could not create reports due to fields failing to load. Fields now load correctly, enabling report creation.

Reporting: Expense Line Currency field returns 'No Records' in Expense Items Reports

Issue resolved where, including the 'Expense Line Currency' field in reports using the Expense Items data source returned no records. Reports now display correctly regardless of the Currency Selection setting, enabling accurate reporting for clients using either 'Line' or 'Claim' level currency options.

Time Off: Mandatory Days not reflecting historic Working Patterns after a Salary Change.

Issue resolved where, Mandatory Days did not reflect an employee's historic working pattern after a salary change, despite the 'Apply Salary History For Mandatory Days' setting being enabled. The system now correctly calculates Mandatory Days based on both current and past working days when applicable.

Time tracking: All Timesheet References appear when approving Time Tracking records.

Issue resolved where, all Timesheet References were displayed when approving Time Tracking records, regardless of their configured applicability. Now, only Reference Levels marked as active for Time Tracking will appear, ensuring accurate and relevant reference selection.



Training: Missing Risks icon on the employee card displays in error when a Job Role has Mandatory Training.

Issue resolved where, the Risks icon on the Employee Card incorrectly flagged Completed or Unexpired Mandatory Training as Missing. The icon now accurately reflects only truly missing Training and Documents, improving at-a glance risk visibility for Managers and HR users.

Performance: Email link for Goal Updates does not use the correct URL for the page.

Issue resolved where, Goal update notification emails sent to Employees included an incorrect link, resulting in an error page. The email link now correctly redirects to the associated Goal in Self Service, ensuring smooth access and improved user experience.

Timesheets: Sunday Hours incorrectly carried forward to following week despite Week Beginning setting.

Issue resolved where, Timesheet records for Sundays were incorrectly assigned to the following week, even when the Timesheet Week Beginning was set to Monday. Reporting and pay calculations now respect the configured Week Beginning setting, ensuring accurate tracking of worked hours.

Bulk Upload: No error displayed when Login Name already exists in Company Users Upload.

Issue resolved where, Company Users Bulk Upload showed a success banner even when a duplicate Login Name prevented user creation. The system now correctly flags an error if a Login Name is already in use, ensuring Admins are notified and can take corrective action.

Workflow: Tags do not populate when for a Notify Only step in Time Off Deletion Workflows.

Issue resolved where, Notify Only steps in Time Off - Deletion workflows failed to populate tags such as [Employee_Name] and [Timeoff_Start_Date]. Emails triggered by these workflows will now correctly display tag data, even when the Time Off is deleted before the email is sent.

Time Off: Standard Length of Service Accrual awards days annually after initial threshold.

Issue resolved where, the Standard Length of Service Accrual Rule incorrectly applied X Days after Y Years and then every year thereafter. The rule now correctly awards X Days every Y Years, ensuring long-term employees receive the appropriate Time Off entitlement.



Email: Backup Request emails not Using Custom SMTP or Custom Domain for links.

Issue resolved where, Backup request emails were sent from support@hrwize.com instead of using the customer's configured Custom SMTP. The email content now also includes environment specific links for customers with Custom Domains.

Employees: 'Custom fields' don't appear on contents when on employee 'View' page.

Issue resolved where, the 'Custom Fields' section was not included in the contents list when viewing an employee profile on the 'View' page. The section now appears correctly in the left-hand navigation, ensuring consistent visibility for all users.

Expenses: 'Split' Button not visible despite enabling Split Claims setting.

Issue resolved where, the 'Split' button was not displayed during Expense Approval, even when the 'Allow Expenses And Mileage Claims To Be Split' setting was enabled. The button now appears correctly, allowing approvers to split Expense Claims as expected.

API: 50 Character limit when updating Ethnicity via API.

Issue resolved where, the Race/Ethnicity field could not be updated via API due to a 50 character limit. The character limit has been increased to accommodate all valid Ethnicity values, enabling successful updates through the API.

User: User Permissions missing on Company Users Edit page.

Issue resolved where certain user settings were not visible on the User Edit page for some accounts. With this fix, all users with valid access will now correctly see the settings and permissions available to them during user management.