Release Notes

Release date: 04.09.25

Version: 24.2.0

Enhancements

Support for User-Defined Genders in Bulk Uploads

- Following customer feedback, we have introduced support for User-Defined Genders in the Update Employees Bulk Uploader.
- By default, there are three options available for Gender: “Male”, “Female” and “Not given”.
- Customers can define their own list of Genders for use in the system under:

Administration > HR > Data Management > Genders

- The Gender field in the Update Employees Bulk Uploader now supports these Genders in customer environments where they have been defined. This uploader can be found under:

Administration > Company > Bulk Upload > Update Existing Employees

- If the Gender provided in the uploaded file does not match one of the available options, a suitable error is displayed.

Improved User Experience when Requesting Time Off

- We have made changes to ensure that the User Experience is consistent when using the Request Time Off actions on the homepage.
- Previously, when using some devices with smaller screens, or a smaller browser window, the experience could vary.
- This change ensures that whenever a user clicks **Request Time Off** on the homepage, they will always see the same, consistent view allowing them to enter their request.

Changes to Employee Views in Display Settings

- We have made changes to ensure a consistent experience on the **Display Settings** page.
- On this page customers can make a choice on the default view their users will see when using the Employee module. Three views are available - Card, Table or Tile.
- Users can also choose which fields are displayed when the Employee Module is displayed in **Card** view.
- Previously, if **Table** or **Tile** view was chosen as the default, the settings for Employee Card Fields were hidden.
- This change ensures that the settings for Employee Card Fields are always available, so that if a user chooses the **Card** view as their default view, or switches to it, the fields available in that view can still be specified.

HRwize

Updates to Deleting Employee Document Categories PRESENT

- Following customer feedback, we’ve introduced new functionality to improve how employee documents are managed, including the ability to **archive documents** in bulk and **delete empty document categories**.

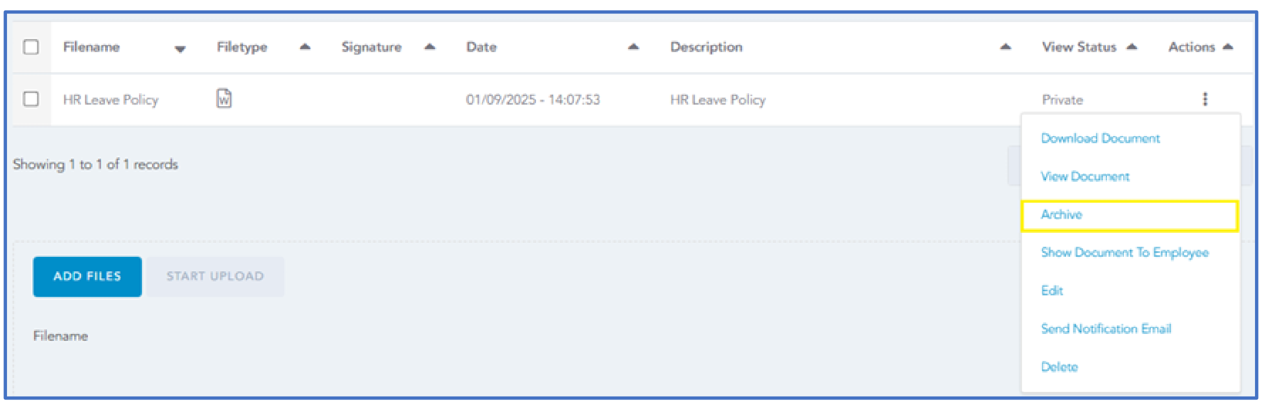
- This enhancement helps Admin and HR users keep employee files organized and reduces clutter in the employee view by hiding archived and deleted documents.

- New options are now available in the Employee Documents section:

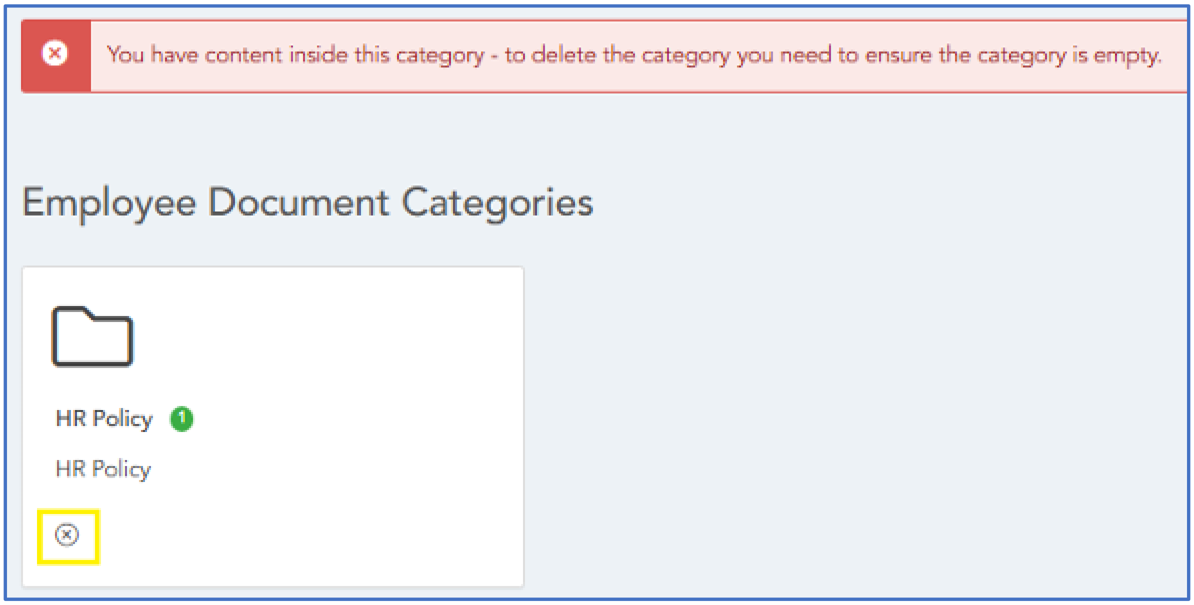
    - Bulk archive one or more documents from a category
    - Archived documents are moved to a separate Archived Documents table
    - Archived documents can be returned to the original category at any time
    - The same actions apply to uncategorized documents

- **Document category folders can now be deleted** if they are empty:
    - A delete (X) icon appears beside each category
    - If the category contains documents, deletion is blocked, and a message is shown to prevents accidental loss of files

- Archived and deleted documents will no longer appear in the "My Documents" section for employees, aligning with the behaviour used in the Company Documents section.



Screenshot: Showing Archive option added for bulk updates



Screenshot: Delete icon for category with error shown if documents are present.

Adding Active/Archived Status for Forms in Report Builder NOT THERE

- Following user requests, we've added **Active** and **Archived** status fields for forms in **Report Builder**, allowing users to filter submissions based on their status.

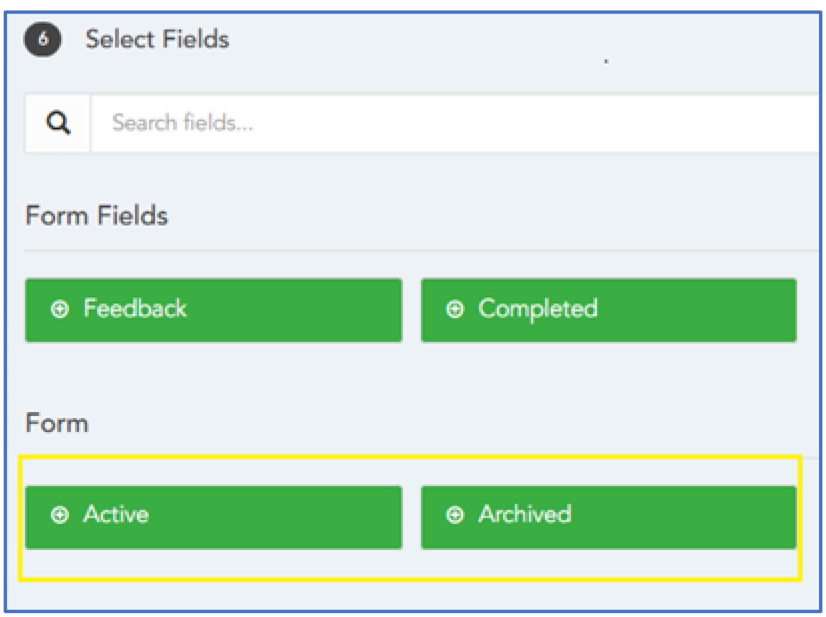
- This update improves the ability to generate reports that focus on either active or archived form submissions, making it easier to analyse relevant data.

- 'Active' and 'Archived' fields are now available in the Report Builder when selecting a Custom Form Dataset. A new "Form" section appears above the "Form Fields" section, displaying these two fields.

- Users can now filter, group, and sort form submissions based on their active or archived status.

- The Active/Archived fields will show up correctly across all report types: Table, Pivot Table, Column/Bar/Line/Pie Chart, Tile, Comparison Tile. These fields support all Report Builder features, such as filtering, sorting, and aggregation.

- For "Other Forms" types, the status will show actual Active/Archived forms. For other form types, the fields will display a **safe placeholder** like "Not found" instead of causing errors.



Screenshot: Showing Report Builder with Active and Archived form fields

Improved Control Over Job Descriptions on Employee Card

- Following user feedback, we've added new options to improve the clarity and customization of job descriptions shown on the **Employee Card**.

- Previously, both **internal** and **external** (generic) job descriptions appeared together in the **job role popup** under the Job Role title, causing confusion for managers.

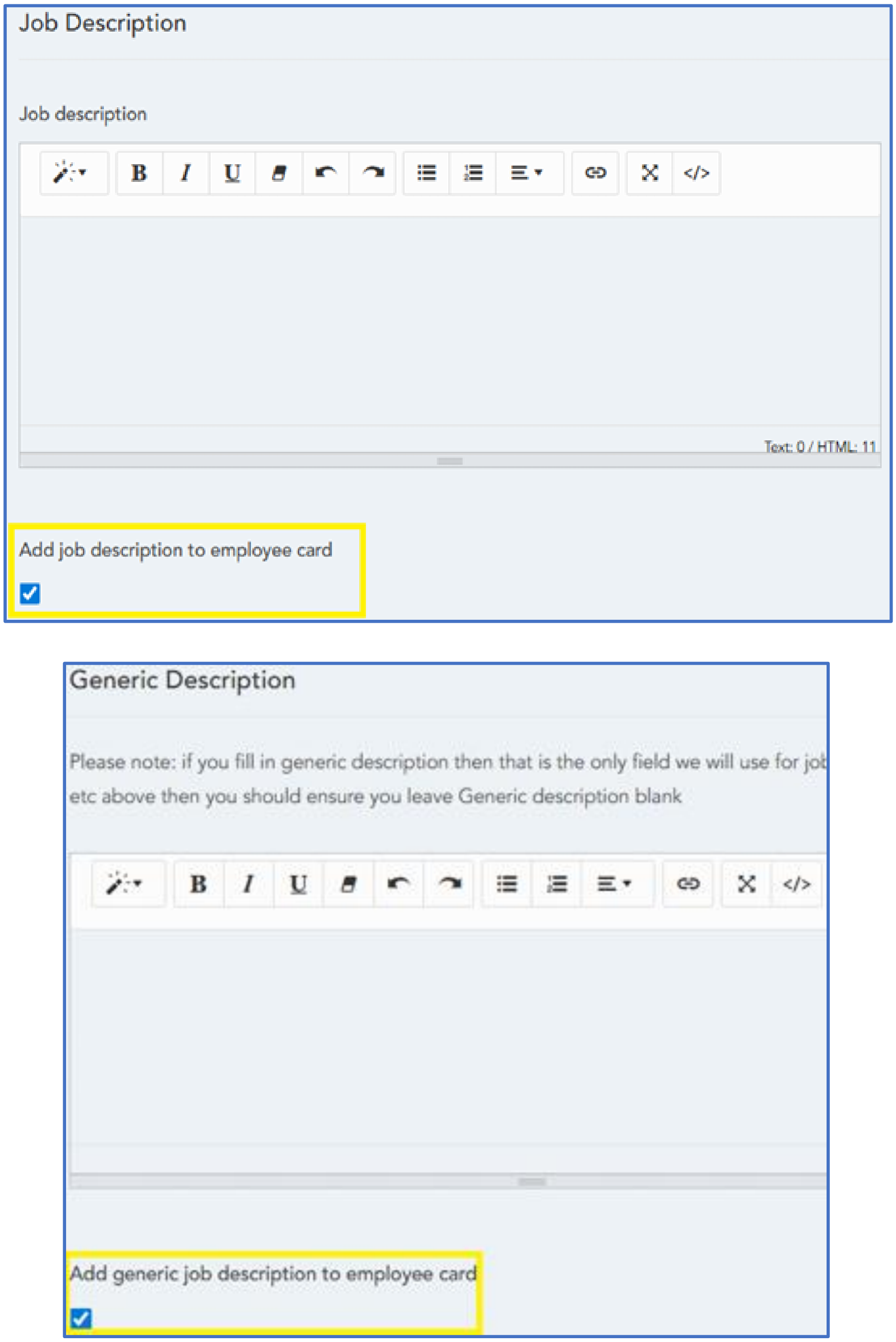
- **Key Improvements:**
    - Job Role Setup Page (Settings → Job Roles → Add/Edit Job Role):
    - Two new checkboxes have been added:
        - **Add job description to employee card**
        - **Add generic job description to employee card**

- These checkboxes control whether the internal job description, the external job description, or both appear on the Employee Card when a manager clicks the job role title.

- The popup titles are now differentiated as:
    - **Job Description** for internal descriptions
    - **Generic Job Description** for external descriptions

- These checkboxes control whether the internal job description, the generic job description, or both appear on the Employee Card when a manager clicks the job role title.

- On Employee Card Popup:
    - If both checkboxes are selected and descriptions are provided, both will show with the appropriate titles: **Job Description** and **Generic Job Description.**
    - If only one checkbox is selected, only the corresponding description will appear.
    - If neither checkbox is selected, no description will appear.
    - Existing job roles will continue to behave as before unless updated.
    - When duplicating job roles, the checkbox settings will carry over to the new role.



Screenshot: Showing new checkbox for both Job description

Module Templates for Expense and Mileage Modules

- Following customer feedback, we've introduced **separate checkboxes for Expense and Mileage modules** in Module Templates, giving admins greater control over module access per user group.

- Previously, both modules were bundled under a single **Expense Management** setting, meaning enabling one automatically enabled the other. With this change, admins can now enable either **Expense, Mileage**, or both independently.

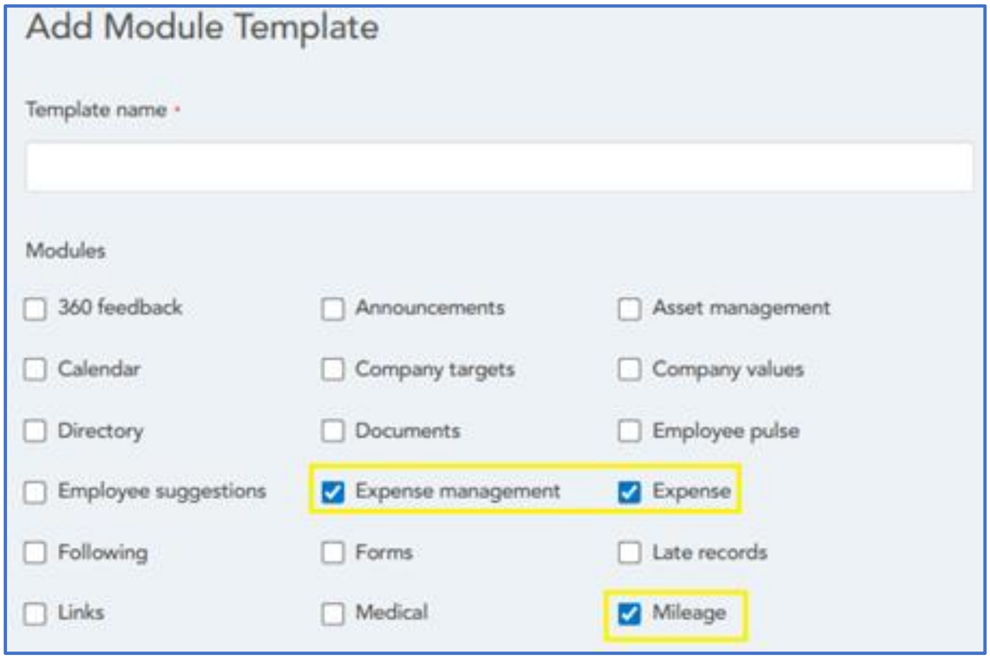
- Under Add/Edit Module Templates → Modules section, you will now see:
    - **Expense** (new checkbox)
    - **Mileage** (new checkbox)
    - **Expense Management** (existing, remains functional)

- Selecting **Expense Management** will auto-check both **Expense** and **Mileage**. Unchecking either Expense or Mileage will automatically uncheck **Expense Management**. Expense Management remains selected only when both modules are checked

- Users will only see the modules that are selected:
    - Selecting only **Expense** → shows Expense module
    - Selecting only **Mileage** → shows Mileage module

- Existing templates that already have 'Expense Management' checked will continue to behave the same (both modules enabled).

- This update does not impact global Expense Settings or the Module Display settings.



Screenshot: Showing separate Expense and Mileage modules alongside existing Expense Management.

Enhanced Training Module with Start and End Date Fields PRESENT

- Following customer feedback, we've added support for **Start Date** and **End Date** fields in training courses to improve scheduling flexibility and reporting accuracy.

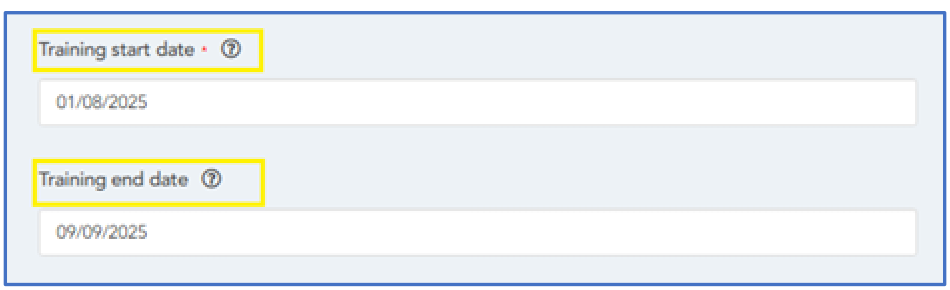
- Previously, training was recorded using a single date with assumed duration across consecutive days. This update allows users to define an exact date range, including non-consecutive training days.

- This update applies across all training workflows, including when adding or editing courses, requesting training (by employees or on behalf of others), approving or updating requests, and accessing training records via **Course Library, My Development,** and **People > Employees > Development > Training**.

- The field "**Training Date**" is now renamed to "**Training Start Date**", and a new "**Training End Date**" field appears directly below it.

- Tooltips have been added for both fields to guide users:
  - Start Date: First possible day the training can begin
  - End Date: Last possible day the training can end

- Existing training records without an End Date remain unchanged. This update supports clearer scheduling and reporting across all training flows.



Screenshot: Showing Training Start and End Date fields

Training Module: Updated CSV Template for Training Dates

- Following customer feedback, we've updated the CSV upload and download template for Training records to include separate Training Start Date and Training End Date columns.

- This enhancement reflects recent UI changes in the Add/Edit Training Course screens, where start and end dates are now managed separately.

- A new CSV template has been introduced with the following changes:
    - The existing Training Date column has been renamed to Training Start Date.
    - A new column, Training End Date, has been added alongside the start date column
    - The rest of the CSV template remains unchanged.

- Users managing Training records can now download and upload the updated CSV in bulk, ensuring training data accurately reflects both start and end dates consistent with the UI.

- The updated CSV template is available here:

  Administration → Bulk Upload → Other Data → Training Records

- When used:
    - Values entered in the Training Start Date and Training End Date columns will update the corresponding fields in the Training Module UI for each record.
    - The Training End Date column can be left blank if an end date is not applicable.
    - Existing reports that reference the old Training Date will automatically map to Training Start Date without errors.

- The updated CSV template is available here: Administration → Bulk Upload → Other Data → Training Records

- When used:
    - Values entered in the Training Start Date and Training End Date columns will update the corresponding fields in the Training Module UI for each record.
    - The Training End Date column can be left blank if an end date is not applicable.
    - Existing reports that reference the old Training Date will automatically map to Training Start Date without errors.

HRwize

	A	B	C	D	E	F	G
1	Employee	Training ti	Category	Training d	Training start date	Training end date	Mandator
2	1234	Training c	IT courses	Descriptic	13/12/2013	25/12/2013	1
3							

Screenshot: Showing Training Start and End Date fields on CSV

Report Builder Added Training Start and End Date Fields PRESENT

- Following customer feedback, we've updated the Report Builder to support **Training Start Date** and **Training End Date** fields, reflecting recent UI changes in the Add/Edit Training Course screens.

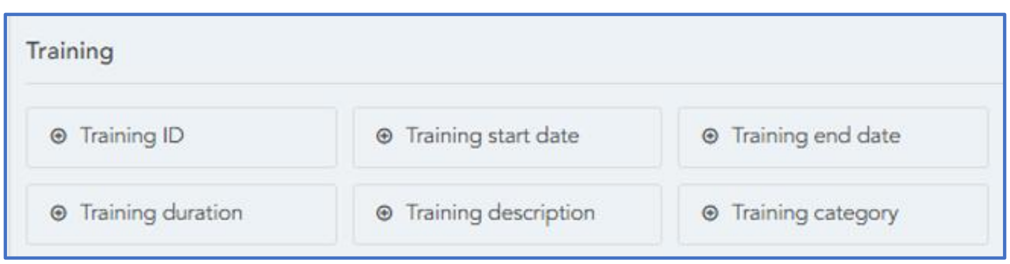
- This enhancement allows Report Builder users to generate reports that accurately capture both the start and end of training periods.

- Key updates include:
  - The existing **Training Date** field has been renamed to **Training Start Date**.
  - A new field called **Training End Date** has been added, along with its related date parts (Year, Month, Week, Day of Week).
  - Both fields are fully compatible with all report types including tables, pivot tables, and charts.
  - The fields support all Report Builder features such as filters, grouping, ordering, and aggregates.

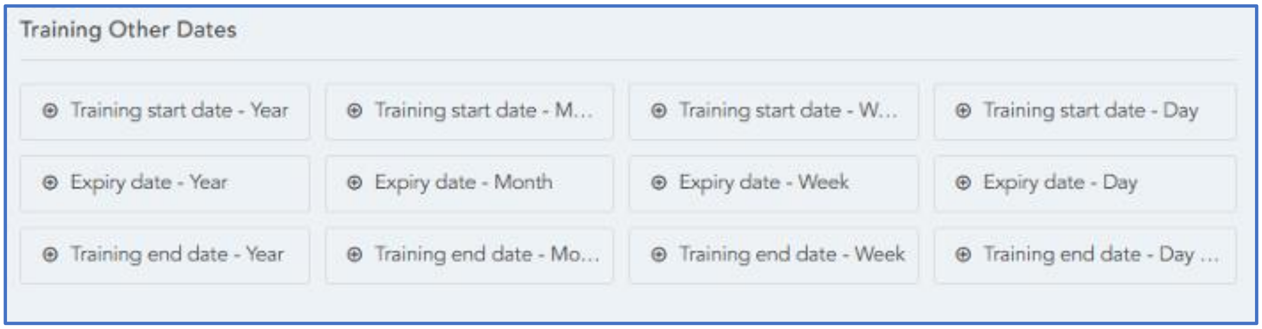
- Existing reports using **Training Date** will continue to work, with **Training Date** automatically mapped to **Training Start Date**.

- For new training records without an end date, as well as records created before the Training End Date field was added, the report will display "Not Found" to indicate missing data.

- These updates ensure that reports are consistent with the Add/Edit Training Course UI and provide more precise insights into training periods.



Screenshot: Showing Training Start and End Date fields on report builder



Screenshot: Showing Training Other Start and End Date fields on report builder

New API Support for Time Off in Lieu Records PRESENT

- Following customer feedback, we've enhanced the public API to support full management of **TOIL (Time Off In Lieu)** records.

- This update enables API users to view, create, update, and delete TOIL records, improving integration and automation possibilities for managing TOIL requests.

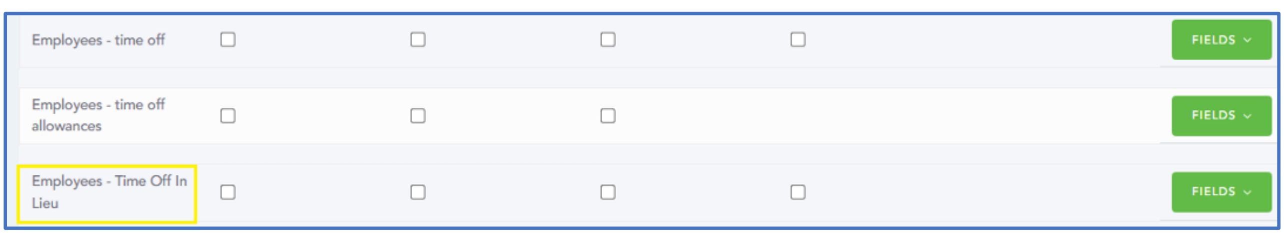
- Key enhancements include:
  - A new row labelled Employees - Time Off In Lieu added to the API v2 settings screen with checkboxes for Create, Read, Update, and Delete actions.

    Administration → Company → Settings → API → API Settings

- Available fields exposed via the API include: *id, company_id, employee_id, timesheet_id, timesheet_date, surplus, timestamp, start_date, end_date, comments, validated*

- When used:
  - Admins can control which TOIL actions and fields are accessible via API by configuring the API v2 Settings.
  - API keys generated will respect these permissions, allowing secure and customized access.
  - Users can automate TOIL submissions, approvals, syncing, and reporting via the API.

- This enhancement supports tighter integration with third-party systems and provides flexibility for customers to manage TOIL efficiently.



Screenshot: Showing TOIL on API v2 Settings Page

Fixes

Time Off: Editing Error

Issue resolved where editing a time off record by changing the start date and clicking submit resulted in errors. Users no longer see the "start date must be before the end date" and "time off type is required" errors when adjusting dates in the correct order.

Dashboard: Financial Restrictions Not Applied Correctly

Issue resolved where financial restrictions on the default extended dashboard did not correctly update the homepage dashboard financial tiles.

Workflow: Issue with [employee_name] Field in Emails

Issue resolved where the [employee_name] field tag was including the employee's Works ID in workflow emails. This prevented users from using the tag as they did not require the Works ID to be pulled alongside the employee name.

Workflows : Continuous Trigger Date Workflows Display Incorrect Due Date

Issue resolved where workflows triggered by a birthday were showing a due date for the following year, causing notifications to be sent a year late.

Workflows : Escalated workflow step doesn't populate workflow tag

Issue resolved where where training workflow tags like [training_expiry_date] and [training_name] were not populating in the workflow description or message subject upon escalation.