# Release Notes Applicationname

Release 2018-12

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change .....) in question in our system.**

# New

## 1. Extend employee personal budget for multiple years

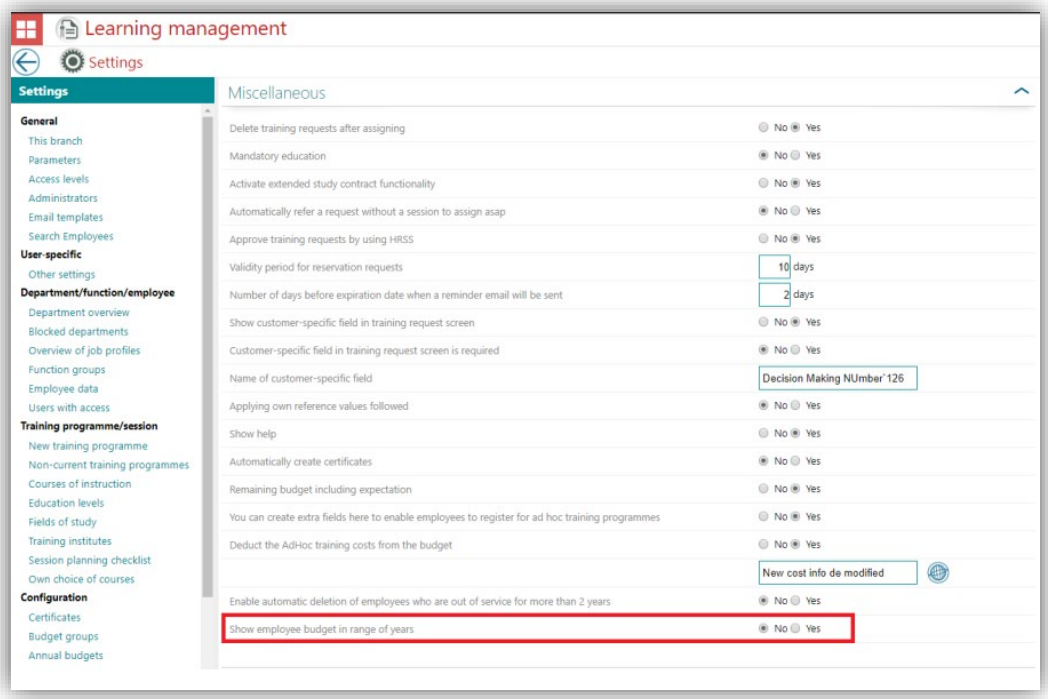
### Why

To allow companies to allocate employee personal budgets over multiple years.

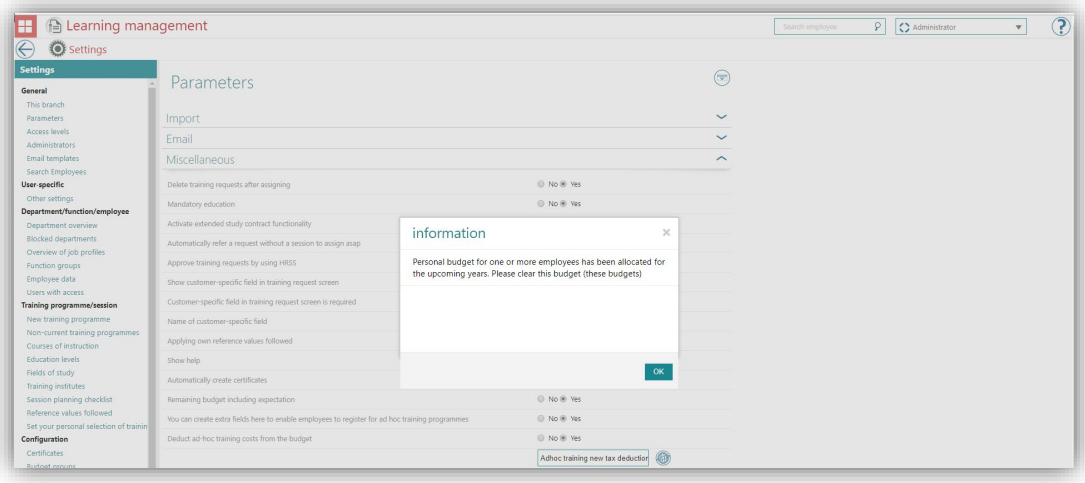
### How

You can activate this feature in *Learning management* | *Settings as follows:*

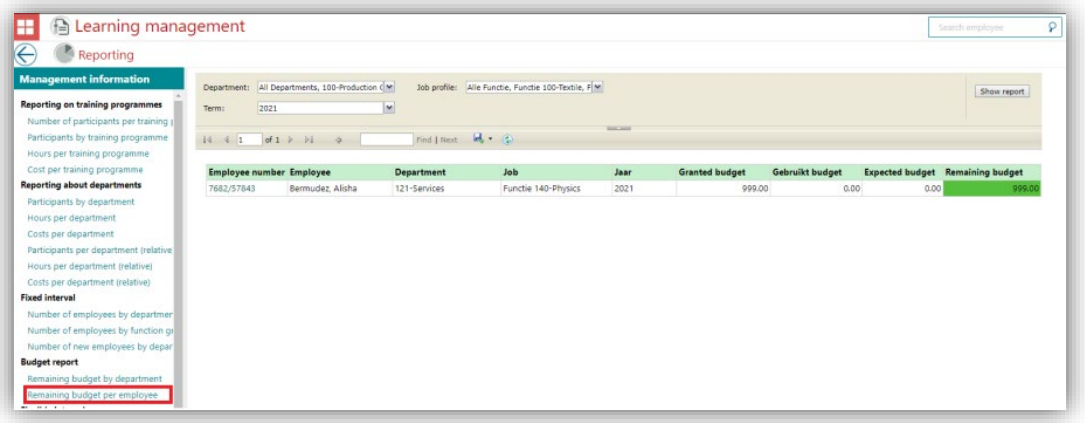
- Login as Administrator
- Navigate to *Settings*
- In the *General* section select *Parameters*. In *Miscellaneous* you will find *Show employee budget in range of years.*



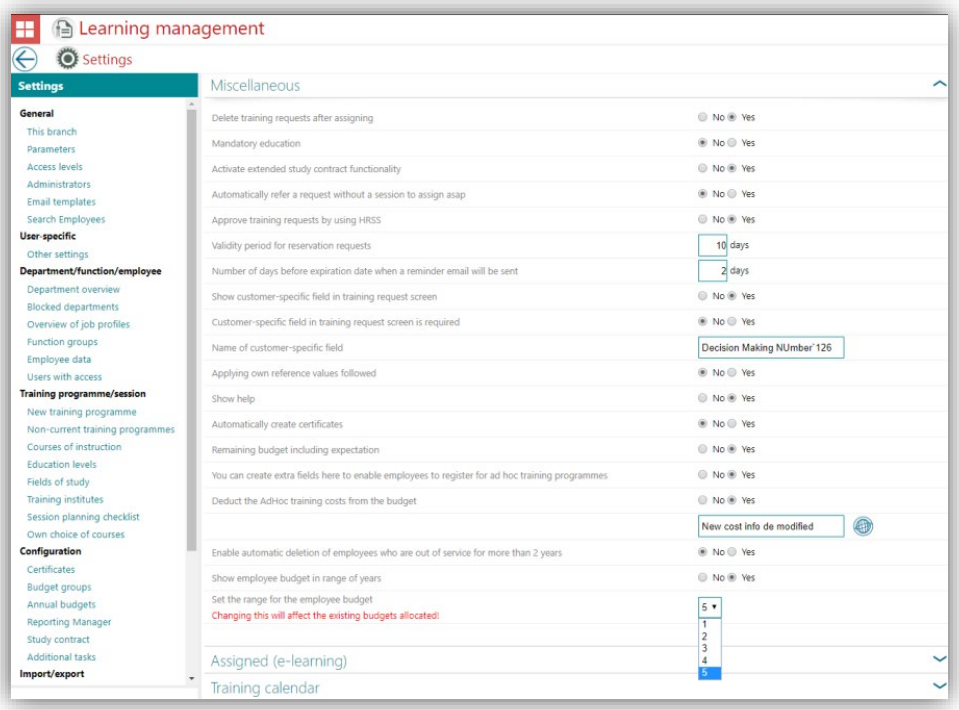

On clicking yes, Learning management will check if any employee has budget for future years, if yes the feature cannot be turned on as shown below else the feature will be turned on.



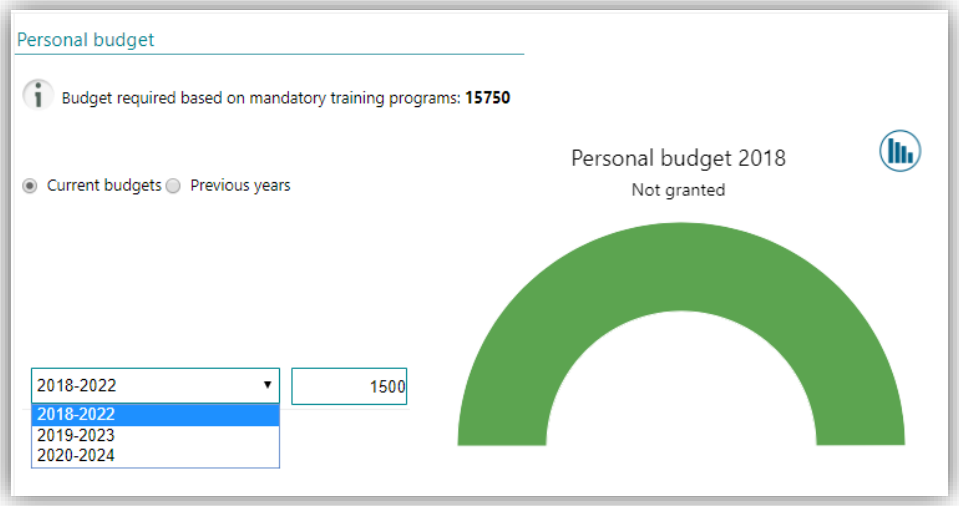

To find employees with budgets for future years, run the *Remaining budget per employee* report under the tile "*Overviews", sub header "Budget report".* This will create an overview of all employees with future budget.

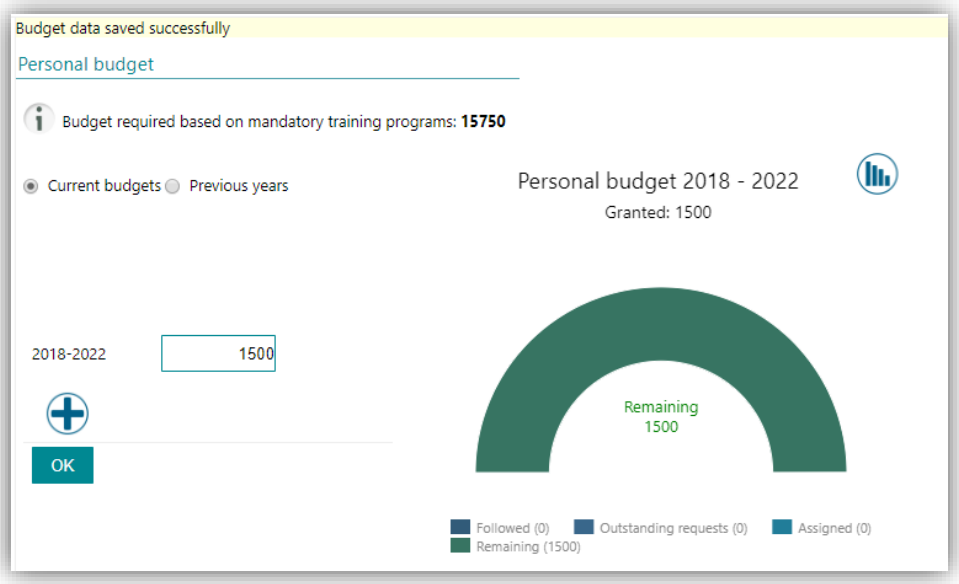



To clear the personal budget for the concerning employee(s), click *"edit"* and click "Edit budgets". Now set the remaining budget to 0 (Zero) to delete the budget. If no employees have budgets for future years, the feature can be activated with default range of 1 year, but you can also choose a budget range from 1 to 5 years.

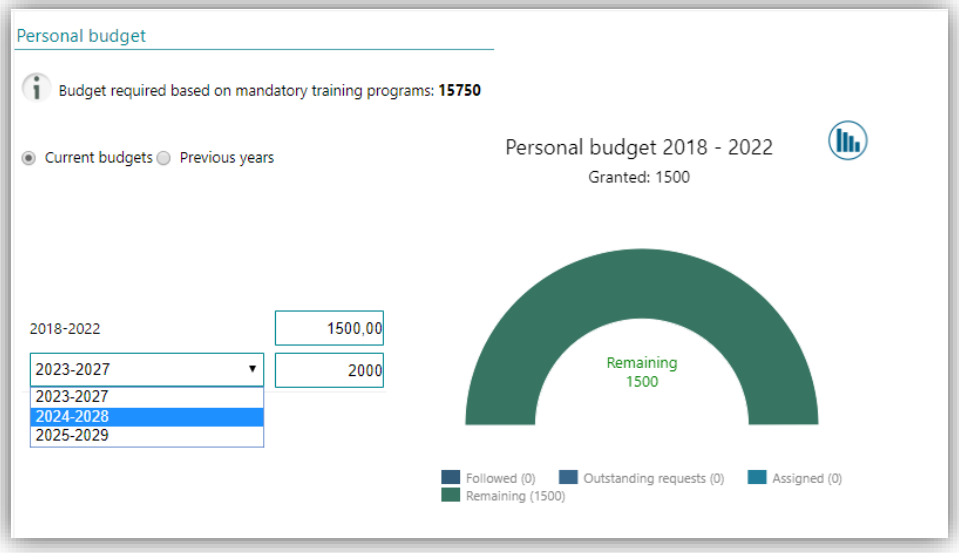



Once the feature is activated the administrator can allocate employee budgets by selecting the drop-down list based on the current year.

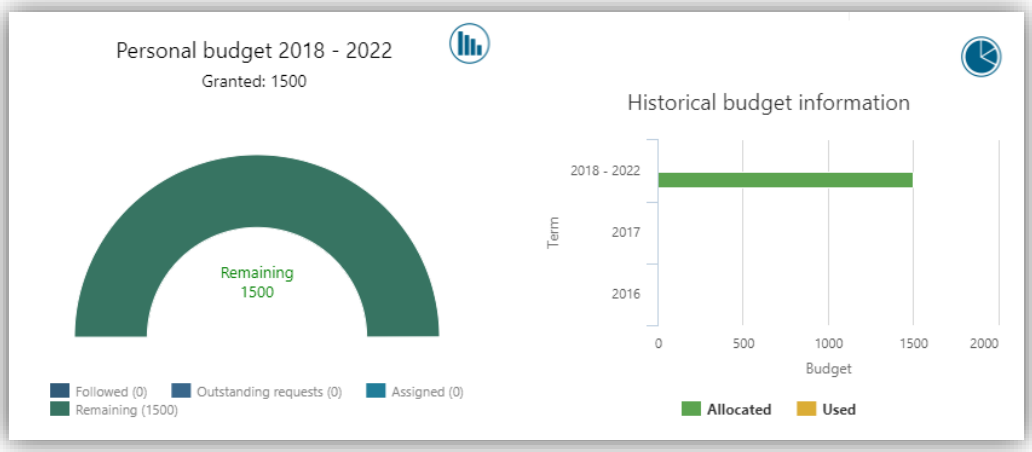




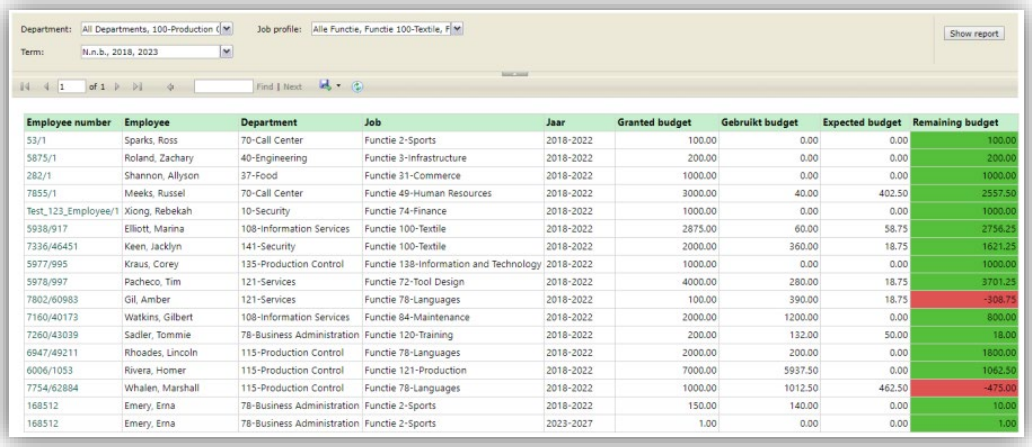

The future budget can now be allocated by clicking which will add budget range options taking into account the end of the year of the previous budget range.




The budget calculation will now take the year range into account. You can also view historical information by using the bar graph button.




Employee budget reports have not changed, except for the Calculation section. Calculation will now be based on the budget range of the selected term.




| Employee number | Employee | Department | Job | Jaar | Granted budget | Gebruikt budget | Expected budget | Remaining budget |
|---|---|---|---|---|---|---|---|---|
| 53/1 | Sparks, Ross | 70-Call Center | Functie 2-Sports | 2018-2022 | 100.00 | 0.00 | 0.00 | 100.00 |
| 5875/1 | Roland, Zachary | 40-Engineering | Functie 3-Infrastructure | 2018-2022 | 200.00 | 0.00 | 0.00 | 200.00 |
| 282/1 | Shannon, Allyson | 37-Food | Functie 31-Commerce | 2018-2022 | 1000.00 | 0.00 | 0.00 | 1000.00 |
| 7855/1 | Meeks, Russel | 70-Call Center | Functie 49-Human Resources | 2018-2022 | 3000.00 | 40.00 | 402.50 | 2557.50 |
| Test_123_Employee/1 | Xiong, Rebekah | 10-Security | Functie 74-Finance | 2018-2022 | 1000.00 | 0.00 | 0.00 | 1000.00 |
| 5938/917 | Elliott, Marina | 108-Information Services | Functie 100-Textile | 2018-2022 | 2875.00 | 60.00 | 58.75 | 2756.25 |
| 7336/46451 | Keen, Jacklyn | 141-Security | Functie 100-Textile | 2018-2022 | 2000.00 | 360.00 | 18.75 | 1621.25 |
| 5977/995 | Kraus, Corey | 135-Production Control | Functie 138-Information and Technology | 2018-2022 | 1000.00 | 0.00 | 0.00 | 1000.00 |
| 5978/997 | Pacheco, Tim | 121-Services | Functie 72-Tool Design | 2018-2022 | 4000.00 | 280.00 | 18.75 | 3701.25 |
| 7802/60983 | Gil, Amber | 121-Services | Functie 78-Languages | 2018-2022 | 100.00 | 390.00 | 18.75 | -308.75 |
| 7160/40173 | Watkins, Gilbert | 108-Information Services | Functie 84-Maintenance | 2018-2022 | 2000.00 | 1200.00 | 0.00 | 800.00 |
| 7260/43039 | Sadler, Tommie | 78-Business Administration | Functie 120-Training | 2018-2022 | 200.00 | 132.00 | 50.00 | 18.00 |
| 6947/49211 | Rhoades, Lincoln | 115-Production Control | Functie 78-Languages | 2018-2022 | 2000.00 | 200.00 | 0.00 | 1800.00 |
| 6006/1053 | Rivera, Homer | 115-Production Control | Functie 121-Production | 2018-2022 | 7000.00 | 5937.50 | 0.00 | 1062.50 |
| 7754/62884 | Whalen, Marshall | 115-Production Control | Functie 78-Languages | 2018-2022 | 1000.00 | 1012.50 | 462.50 | -475.00 |
| 168512 | Emery, Erna | 78-Business Administration | Functie 2-Sports | 2018-2022 | 150.00 | 140.00 | 0.00 | 10.00 |
| 168512 | Emery, Erna | 78-Business Administration | Functie 2-Sports | 2023-2027 | 1.00 | 0.00 | 0.00 | 1.00 |

# Release Notes
# Learning Management

Release 2018-11

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change .....) in question in our system.**

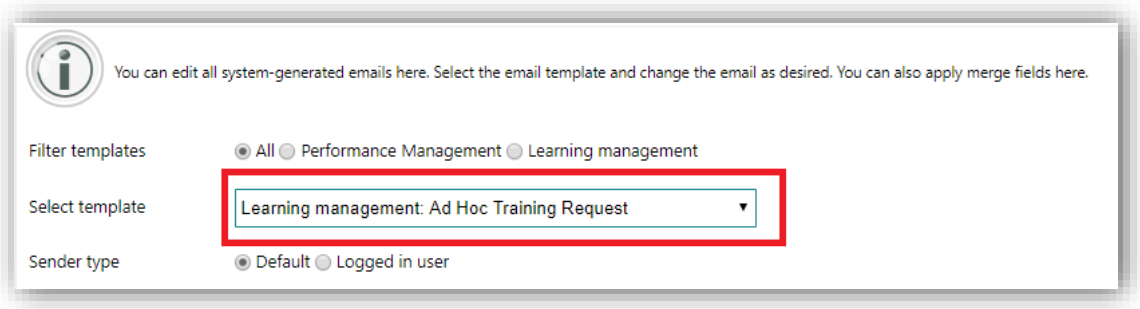
# Solved Messages

## 1. Email templates of ad hoc requests not available for HR Professional (change 881566)

### Message

If a HR Professional uses *Learning Management* the email templates for ad hoc requests are not available.

### Solution



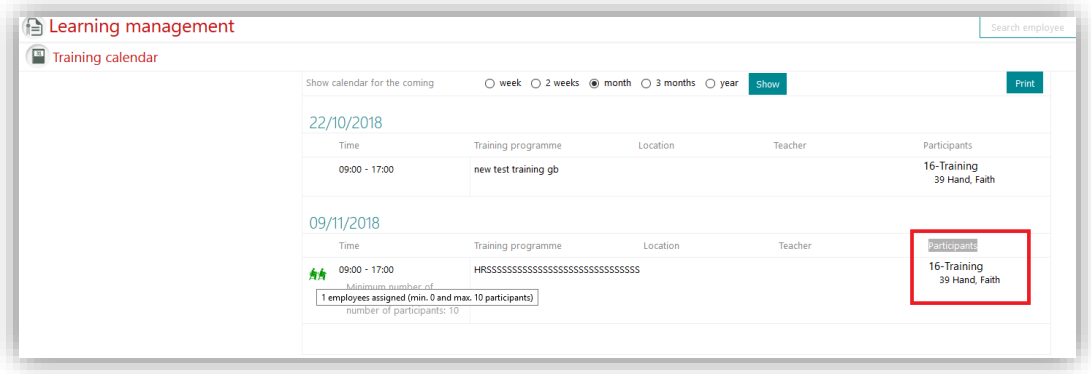

Two email templates related to ad hoc reviews are available now for the HR Professional role.

## 2. The number of participants is not visible for role teacher (change 773794, change 843360)

### Message

In the *Training calendar* under *Participants* there was always an 0 (null) displayed.

## Solution



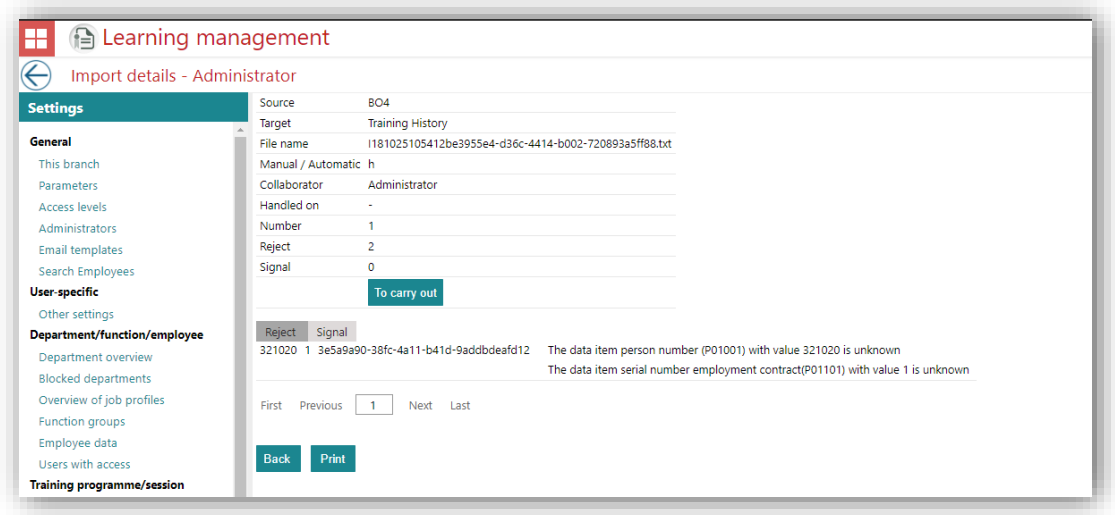

Now we are showing both the reserved and scheduled participants.

# 3. Importing eLearnings is rejected (change 936702)

## Message

Importing eLearning file was rejected and there was an error message displayed.

## Solution




Now the file is imported without an error message.

# 4. Displaying Personal budget in terms of the range of years

## Remark

In preparation of the December release the functionality for the *Personal budget* in terms of the range of years is built in.

It is however not ready to use.

# Release Notes
# Learning Management

Release 2018-08

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change .....) in question in our system.**

# Modified and improved.

## 1. Additional merge fields to email templates

### Why

Some email templates are missing some essential mergefields.

### How

For the email templates below we have added new merge fields:

First and Last name employee for:

- TrainingRequestAcceptedMail
- TrainingRequestScheduledMail
- TrainingRequestScheduledAsapMail
- TrainingNeutralMail
- TrainingRejectionMail

Name employee for:

- TrainingRequestReservedMail
- TrainingApprovalForWorkflow
- TrainingRejectionForWorkflow
- SendEmailForNewSessions
- TrainingExpiredForWorkflow
- TrainingPossibleExpirationForWorkflow

# Release Notes
# Learning Management

Release 2018-07

Version 1.0

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Upload of certificaten to Personnel File (change #594774) 4

**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message (change .....) in question in our system.**

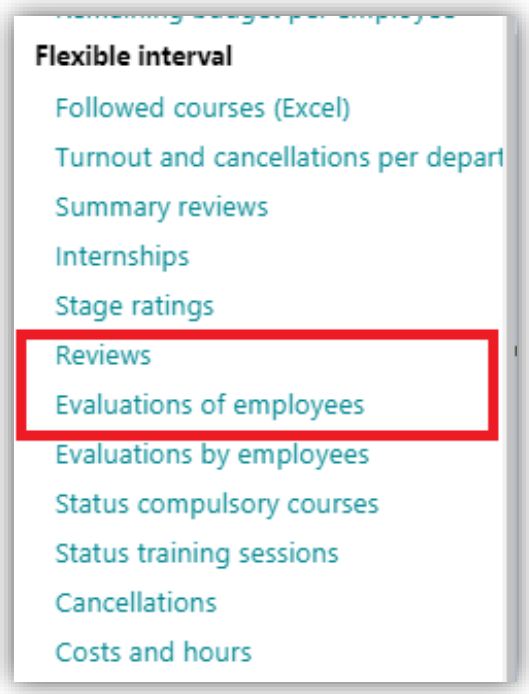
# Modified and Improved

## Translated 2 Learning Management reports

### Why

Our team is in the process of translating Learning Management reports periodically. Our goal is to have all reports translated in the near future.

Below are the two reports that have been translated:



# Solved Messages

## Learning Management Export training history does not generate Excel document (change #806165)

### Message

Training history file download produces XML document, whereas it should be downloaded as Excel

### Solution

After the fix the file will be downloaded as Excel and not as XML.

## After-work workflow does not work as expected (change #835839)

### Message

1. After the training, a mandatory evaluation form is required when "after-work" has been completed.
2. Employees must return the form within a maximum of 7 days after the training
3. The after-work is mentioned on the after-work tile
4. State of after-work has not yet been classified as "done".
5. Once you classify the employee as "followed the training", the after-work is immediately classified as “done”.
6. When you click on the 'work done' button, the after-work is suddenly no longer submitted.

### Change

After the fix, the workflow works as expected with after-work scenario for trainings.

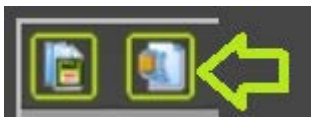
## Upload of certificates to Personnel File (change #594774)

### Message

If a certificate was created as a result of a training session, in some cases the button for uploading that certificate to Personnel File was missing.

### Change

This problem is solved. If you create a certificate now, the button for uploading the certificate to PDOL is displayed.



# Release Notes
# Learning Management

## Release 2018-06

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change .....) in our system.**

# Changed and improved

## 1. Issue with date format on Search Employee page (change #800668)

### Message

The date format was hard coded. Changed the date format and also fixed the sort issue due to date format.

# Solved Changes

## 2. Mandatory Training now removed after deletion from training history Page (change #782034)

### Message

Employee's training details where not deleted after deletion of Training from training history page.

### Solution

After deleting the training from the training history page the employee's training details will also be deleted.

## 3. Tile agenda gives blank page to employee role (change #805333 )

### Message

The list was excluding the logged-in employee-id, so he was not able to see his own future session data even though he had access.

### Solution

Correct page is now shown.

# Release Notes
# Learning Management

## Release 2018-05

Version 2.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change .....) in our system.**

# General

## 1. Learning Management release highlights

The highlights of this release in Learning Management are the changes and enhancements done to implement the GDPR Legislation.

You will soon receive more information on this topic.

# Modified and Improved

## 2. Changes to training history import for 'stand alone' customers

### Message

For customers who do not us an HR Core application (stand alone) we should use a unique code as an identifier for an employee instead of the SyncId when importing training history for employees.

### Solution

For these customers a unique code is used instead of the SyncId to identify the employee when inserting or updating training history for employees.

No changes have been made to the previous import process.

## 3. Changes to employee import for standalone customer

### Message

Currently it is not possible to update an employee's manager in the import manager.

### Solution

A new option has been added in the employee import file to enable update of the employee's manager using the import file only.

- A new XML tag in the import file has been added.
- It will override managers for those employees whose department manager is a direct manager (indicated with value 'N').
- The existing csv import will still be there as well.

An example of the XML data is shown below:

```
<directRoleAssignments>
        <directRoleAssignment>
          <supervisorRole>
                <roleID>MGR</roleID>
                <roleName>Manager</roleName>
                <startDate>2018-01-01</startDate>
          </supervisorRole>
          <supervisor>
                <personTk>1045</personTk>
                <personID>1045</personID>
                <lastName>Mitt</lastName>
          </supervisor>
          <employment>
                <personTk>1900</personTk>
                <personID>1900</personID>
                <lastName>Ramirez</lastName>
                <employmentID>9</employmentID>
                <employmentTk>9</employmentTk>
          </employment>
        </directRoleAssignment>
</directRoleAssignments>
```

### Your action

No action needed

## 4. Authorization has been added for reports

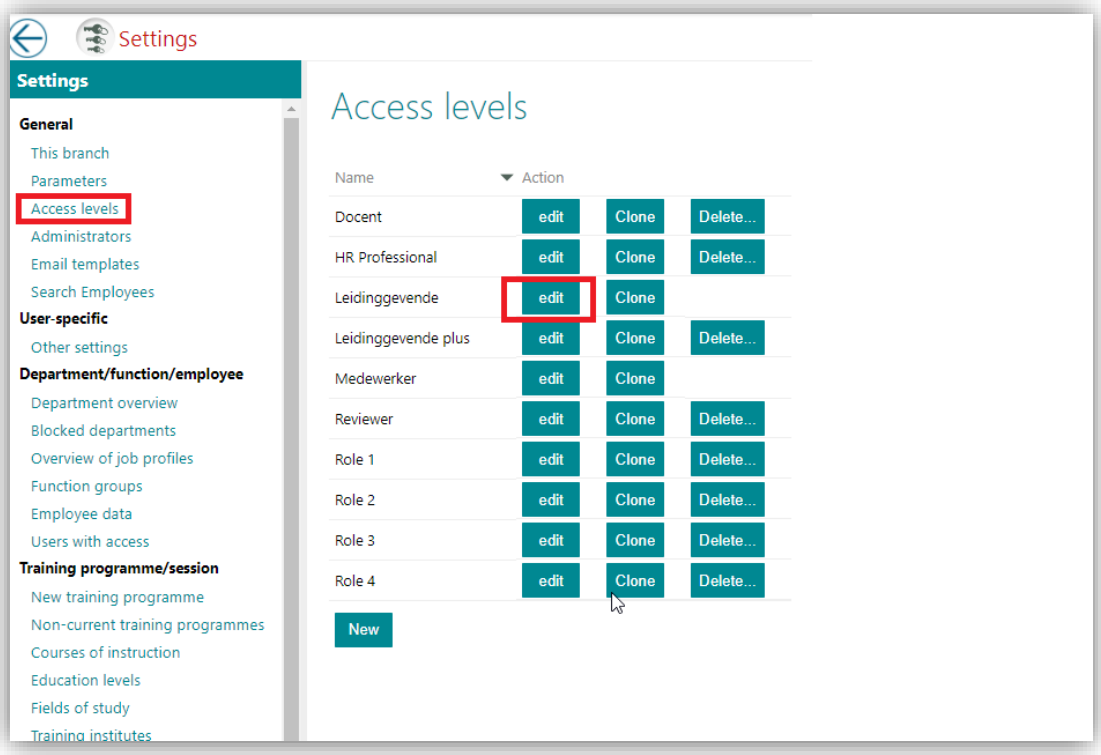
### Message

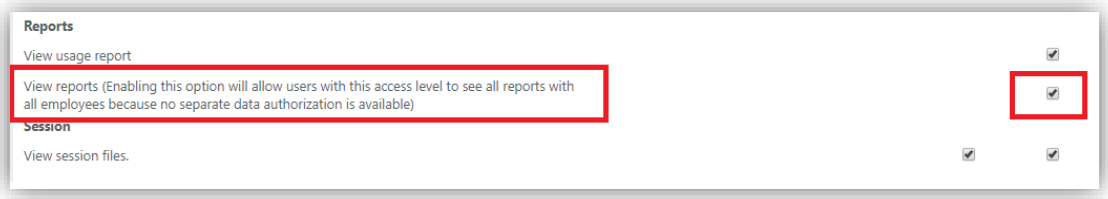
Authorization has to be implemented for accessing reports in Learning Management.

### Solution

Now administrator can provide access to any role, except *Employee* for reports.

**Note:** Full authorization will be given to any role that must have access to all the reports in Learning Management.




# 5. Changes in the Flex report to show cost information

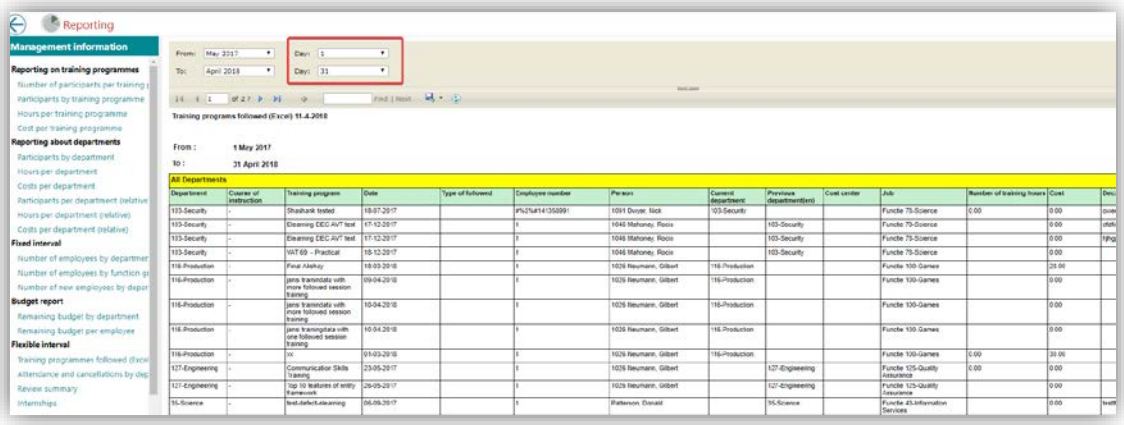
## Message

Currently the Flex report uses the cost from a training and not from the session. This is not appropriate for all customers.

## Solution

If session costs are overridden those values will be considered.

A set of filters has been added: it is now possible to set a specific day of the month.




## 6. Include start and end date of the review cycle in the Performance API card (Home Team API card)

### Message

The start and end date must be included for the review cycle in the Performance API card (Home Team API card).

### Solution

The start and end date (both month and year) of the review cycle have been added. Additionally, a total count of the reviews in each phase is now shown.

# Solved Messages

## 7. Employee training request still in waiting list when session is cancelled (change #622847 )

### Message

The employee's training request is still in the waiting list when the session is cancelled.

### Solution

When a session is cancelled the training request will be removed from the list.

# 8. Training agenda shows repetitive records (change #750373)

## Message

Training agenda shows repetitive records.

## Solution

After this release every agenda item is displayed individually without duplication.

# Release Notes
# Learning Management

## Release 2018-04

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change .....) in our system.**

# General

## 1. Learning Management Release Highlights

The focus of this release is implementation of the GDPR requirements in Learning Management.

# New

## 2. GDPR Implementation in Learning Management - Employee deletion

### Message

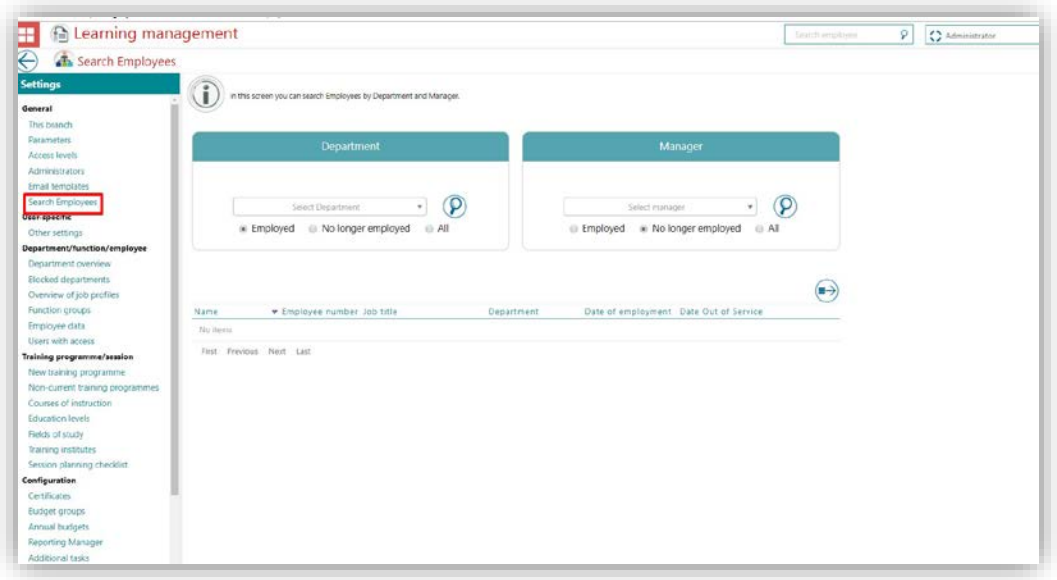
Due to GDPR regulation it must be possible to permanently delete employees which are no longer part of your organisation, including all linked data.

### Solution

Learning Management now offers functionality to permanently delete employees and the linked data.

Follow this path.

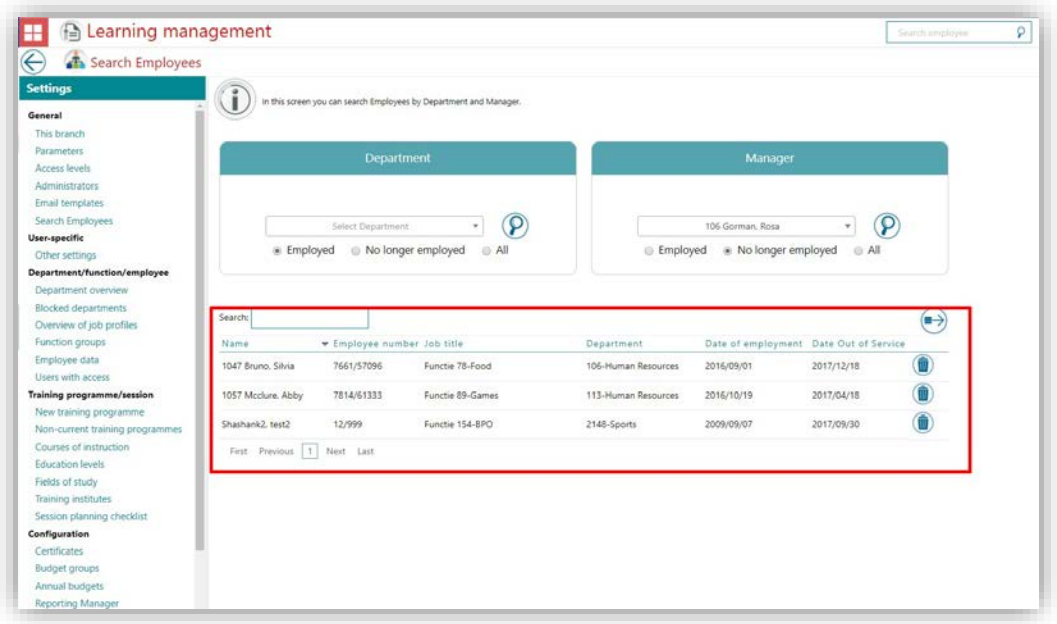
*Learning Management* | *Settings* | *Search Employees*



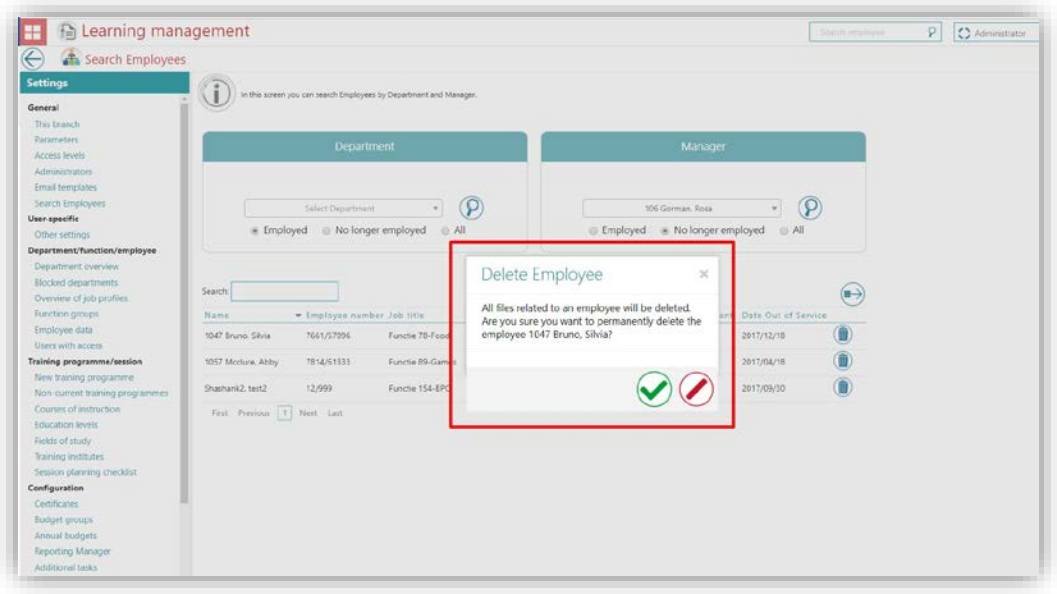

Search the employee that has to be removed. Use the filters *Department* or *Manager* to narrow your search.

Select **No longer employed** to be sure you have the correct employee.

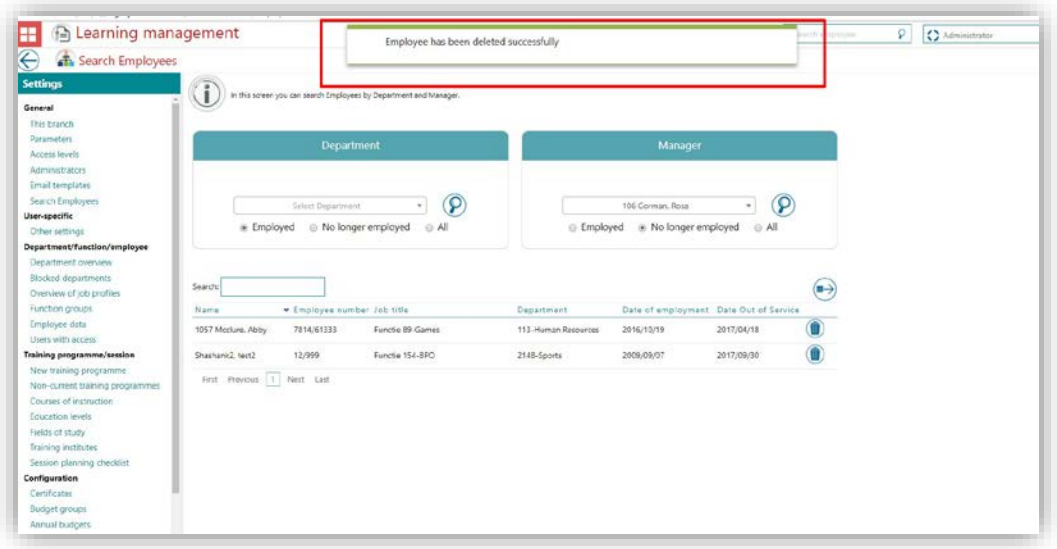
Click the Search option.




All former employees will now be listed.




To permanently delete these employees, click the delete icon and confirm your action.




Once confirmed, the message that it has been carried out succesfully is showed.

**Note:** This is a permanent deletion. Once the employee is deleted, all the information such as scores or personal files linked to the employee will be deleted and cannot be undone.

## 3. GDPR Auto deletion of out of service employees

### Message

As part of GDPR, the out of service employees will be automatically deleted after two years.

### Solution

Learning Management will automatically delete employees who are out of service for more than two years. This process keeps track of all out of service employees and when this period exceeds two years, the employee will be permanently deleted.

**Note**: This is a permanent deletion. Once the employee is deleted, all the information such as scores or personal files linked to the employee will be deleted and cannot be undone.

## 4. Add a certificate to a training

### Message

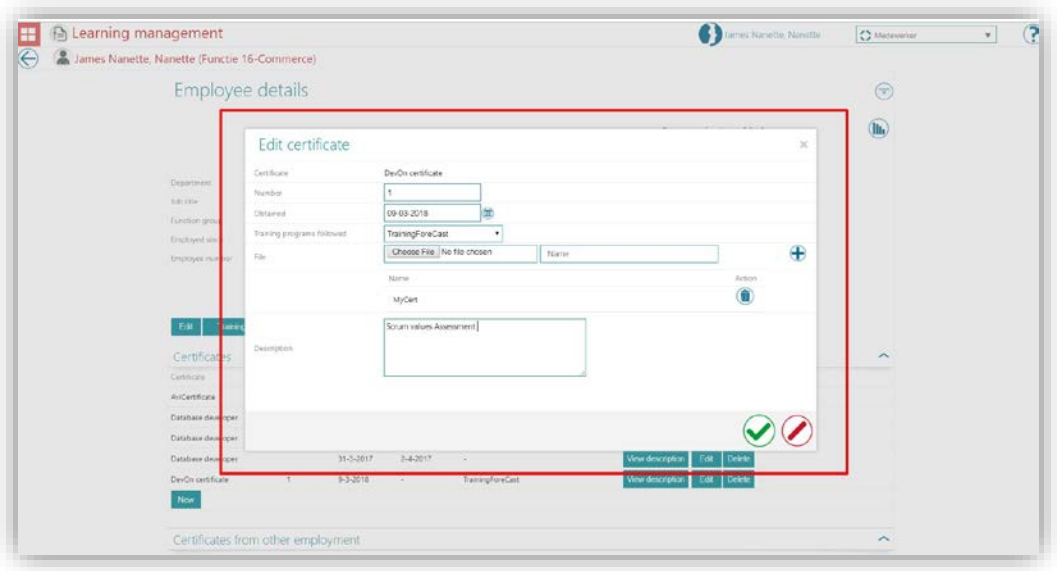
To the *Certificate* tab of the employee's profile page new functionality is added which enables him or her to add a newly earned certificate to the followed training.

### Solution

Your employees can now add their certificate to the training via the *Certificate* tab on their profile page. It is also possible to add attachments.

Employees of your organization can do this using following path.

*Learning Management | My profie page (employee login) | Certificate Tab*




The employee can add his or her new certificate and if required add documents.

**Note**: Employee's that have access to *Add/Edit Certificate* will be able to use this functionality.

# Changed and Improved

## 5. Report *Review summary* translated

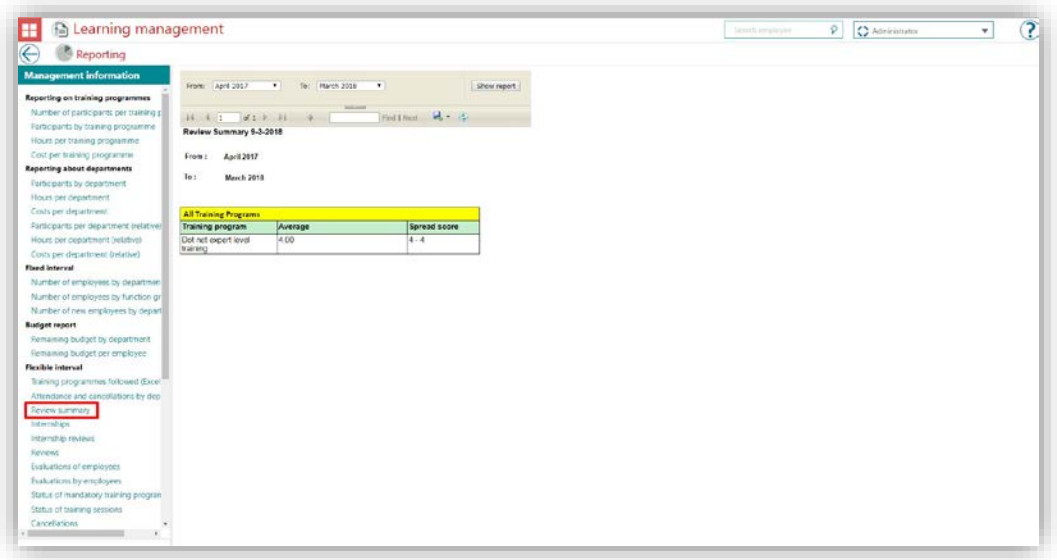
### Message

This report was not yet translated.

### Solution

The header and other texts in the report are available in the languages Dutch, English, German, French and Spanish.

*Learning Management | Overview | Review Summary*




# 6. Report *Internships* translated

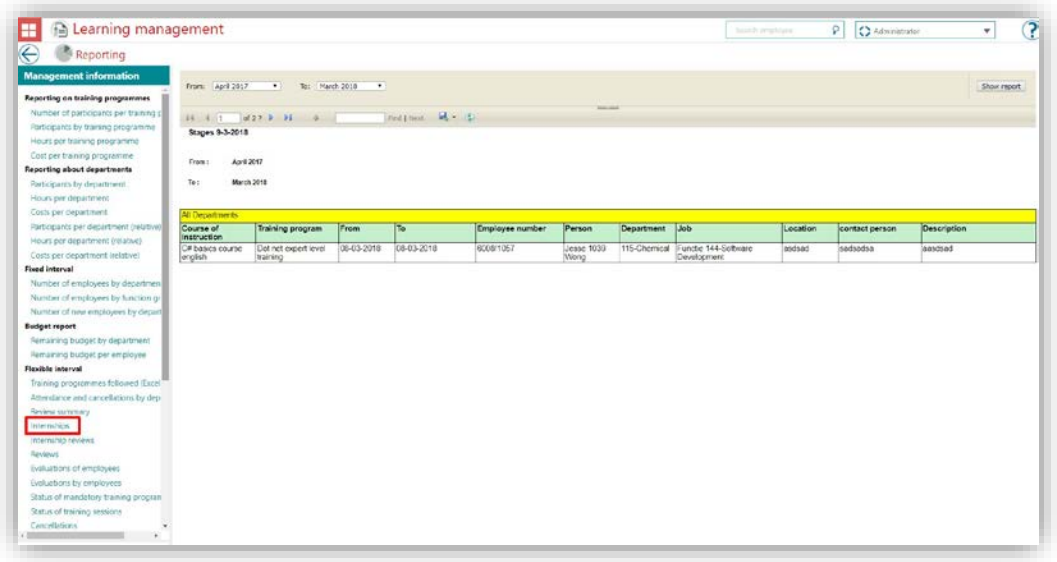
## Message

This report was not yet translated.

## Solution

The header and other texts in the report are available in the languages Dutch, English, German, French and Spanish.

*Learning Management | Overview | Internships*



## 7. Report *Internship reviews* translated

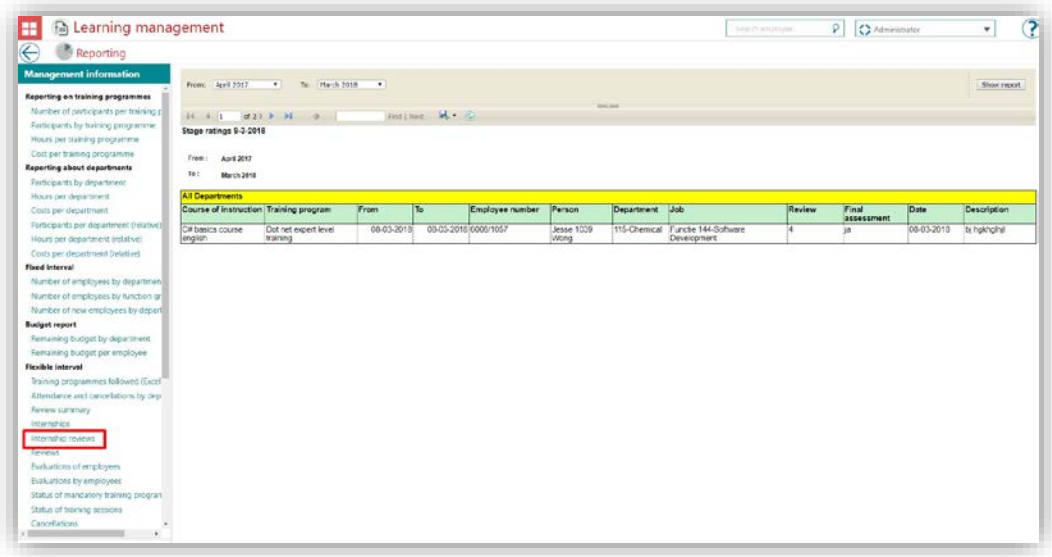
### Message

This report was not yet translated.

### Solution

The header and other texts in the report are available in the languages Dutch, English, German, French and Spanish.

*Learning Management | Overview | Internship reviews*




# Solved Messages

## 8. E-learning module has disappeared (Change #713696)

### Message

The mandatory e-learning disappears.

### Solution

This is fixed and the mandatory e-learning will be displayed.

# 9. Issue with displaying training date (Change #724745)

## Message

The employee was presented the wrong date for a training without upcoming following date.

## Solution

This is fixed. The screen now shows '-' when there is no upcoming following date.

# Release Notes
# Learning Management

## Release 2018-03

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change .....) in our system.**

# General

## 1. Learning Management release Highlights

This release of Learning management will introduce a new feature *Import budgets* which will help organisations to perform a bulk import of employees' budgets in Talent Management. In this release some aspects of the EU General Data Protection Regulation (GDPR) are also implemented.

# New

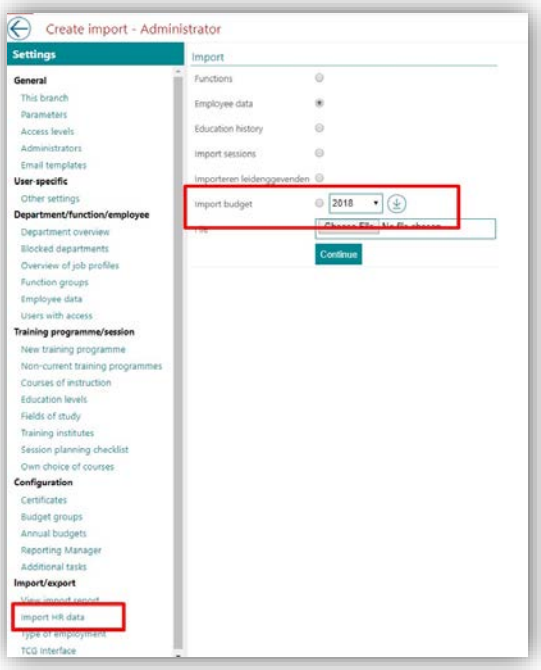
## 2. Importing employee budgets

### Message

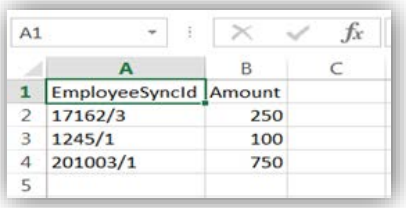
In Talent Management you will now be able to import employee budgets.

### Solution

You can now import employee budgets in Talent Management using the following steps.

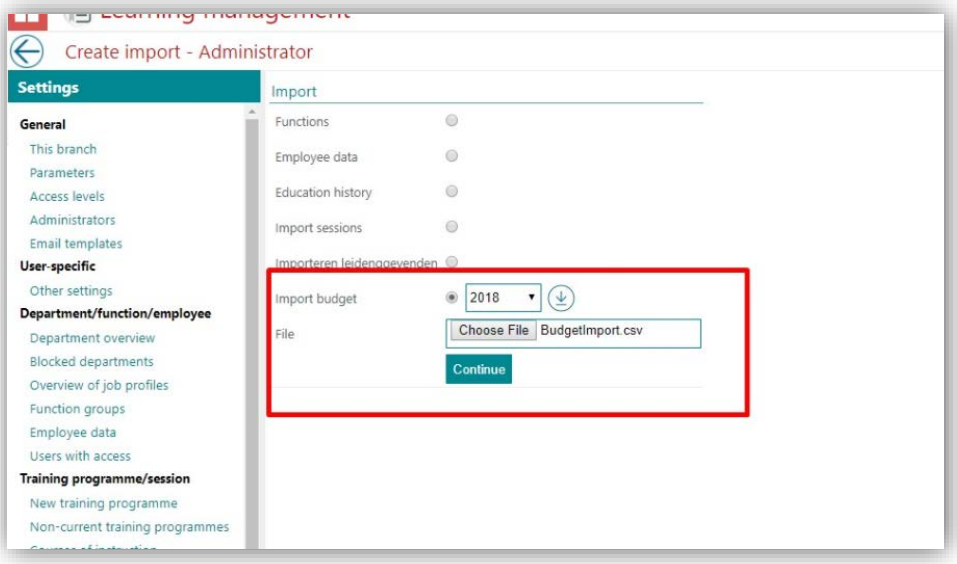



Users can download a sample excel file by clicking the icon.
After you have updated this file with the correct EmployeeSyncid's and Amounts, you can save and upload the file to Talent Management.

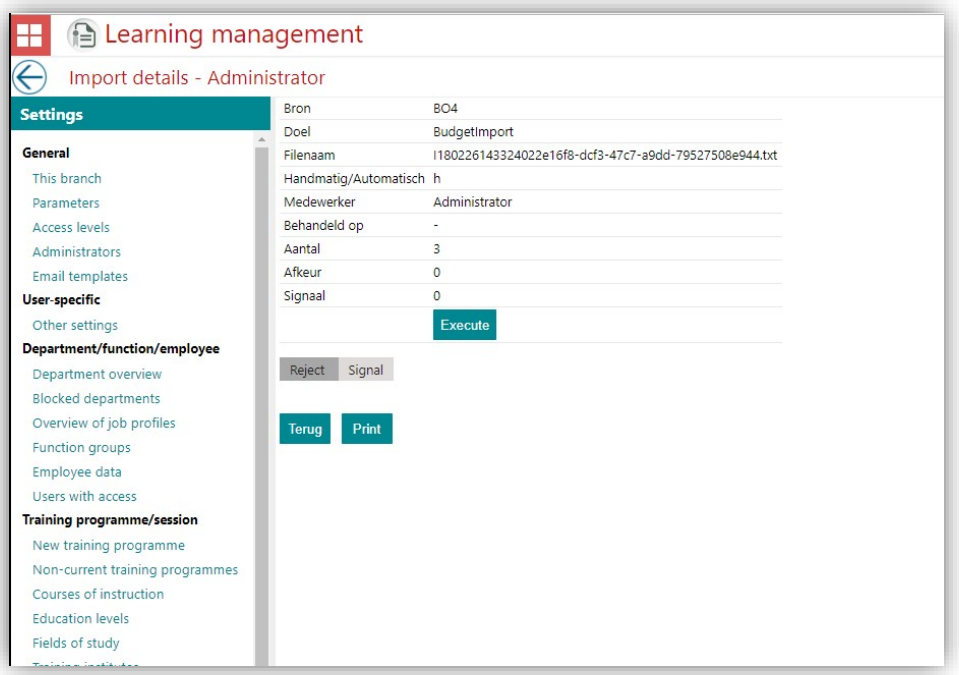


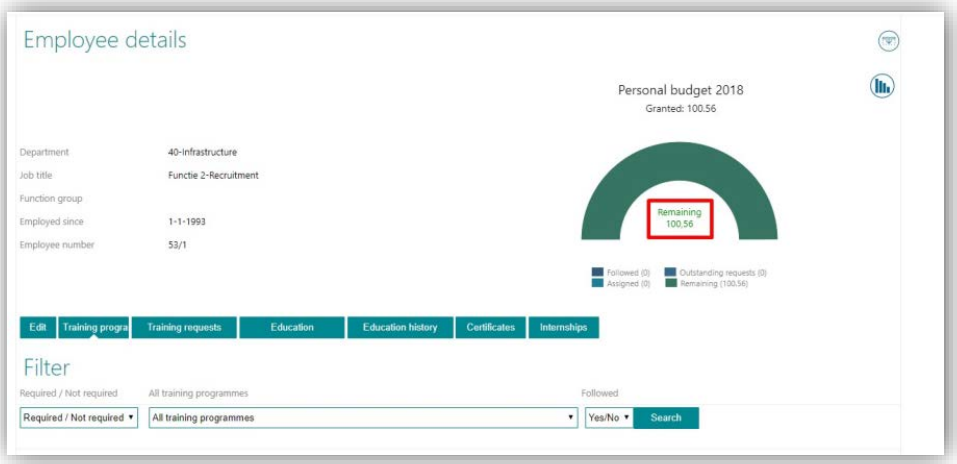
| | A | B | C |
|---|---|---|---|
| 1 | EmployeeSyncId | Amount | |
| 2 | 17162/3 | 250 | |
| 3 | 1245/1 | 100 | |
| 4 | 201003/1 | 750 | |
| 5 | | | |

To import the budgets, select the proper file and click on the continue button.




After the import, you will get an overview of the results and you can then check the budgets of the employees on each employee Profile page.






Note: This functionality is not available for standalone customers.

# Changed and Improved

## 3. GDPR Implementation in Learning Management- Reports

### Message

As part of the GDPR (General Data Protection Regulation) implementation, the access to report is revoked for all the roles other than Administrator and HR professional.

### Solution

Now only the HR Professional and Administrator will be able to access the report. The other roles will not have access. Furthermore, the option to provide access to reports is removed from the Access level page for all roles.

*Learning Management | Setting | Access levels*

# 4. Report - Number of new employees by department - is translated

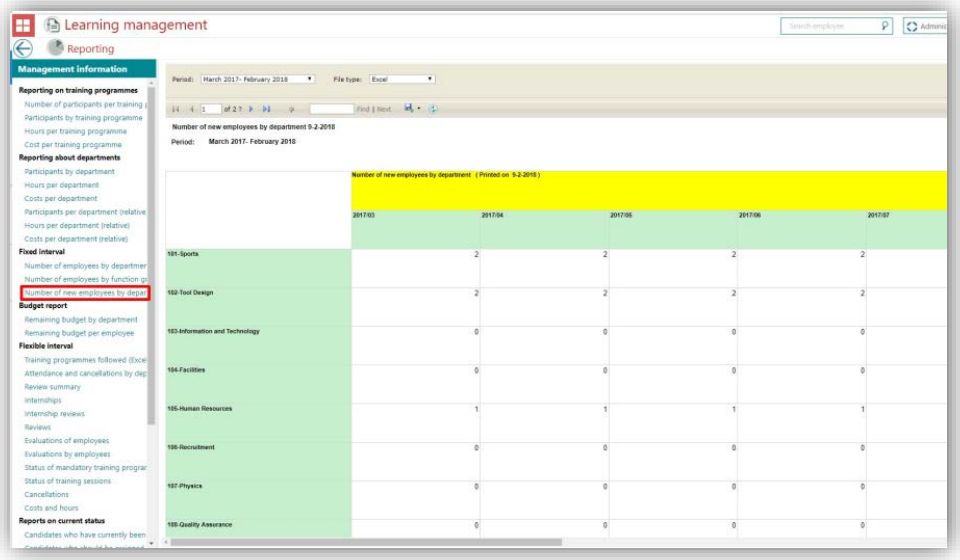
## Message

This report has now been translated. The header and other texts in the report are available in several languages.

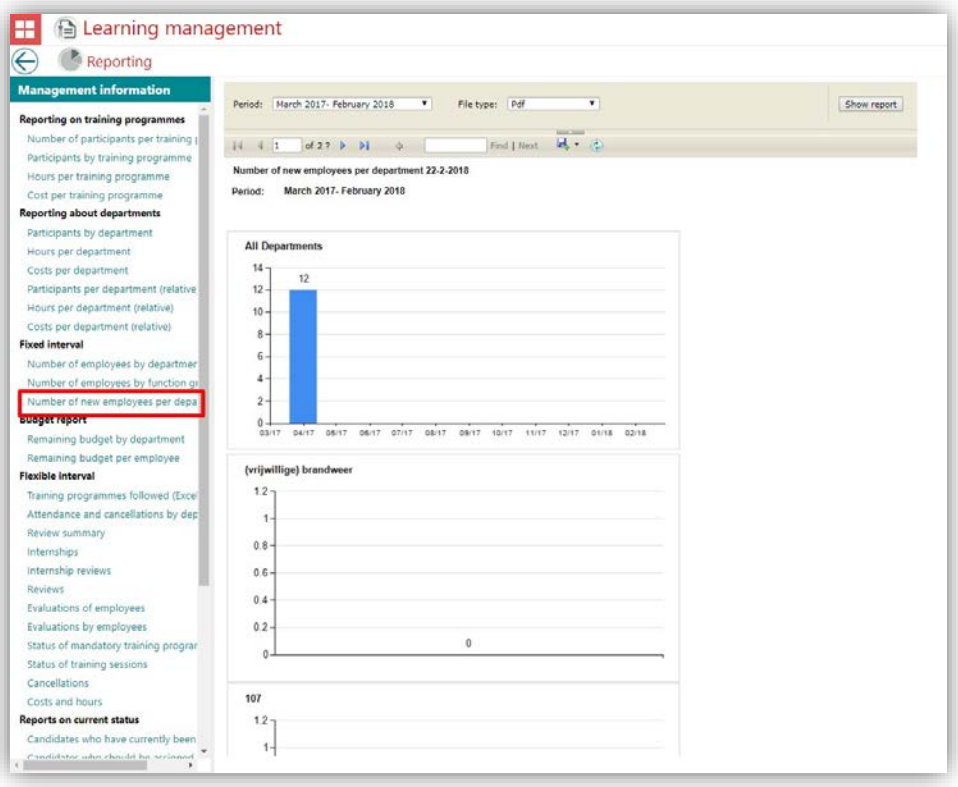
## Solution

The headers in report 'number of new employees by department' have now been translated. *Learning Management | Overview | Number of new employees by department*

As Excel:



As PDF:




**Please note**: The following items cannot be translated due to limitations in the Microsoft Framework.

1. Tool tip of save, forward and backward icons.
2. 'Find text in report' and 'of' text on the report.
3. Also note that, when the report is downloaded, it will be downloaded with the English report name.

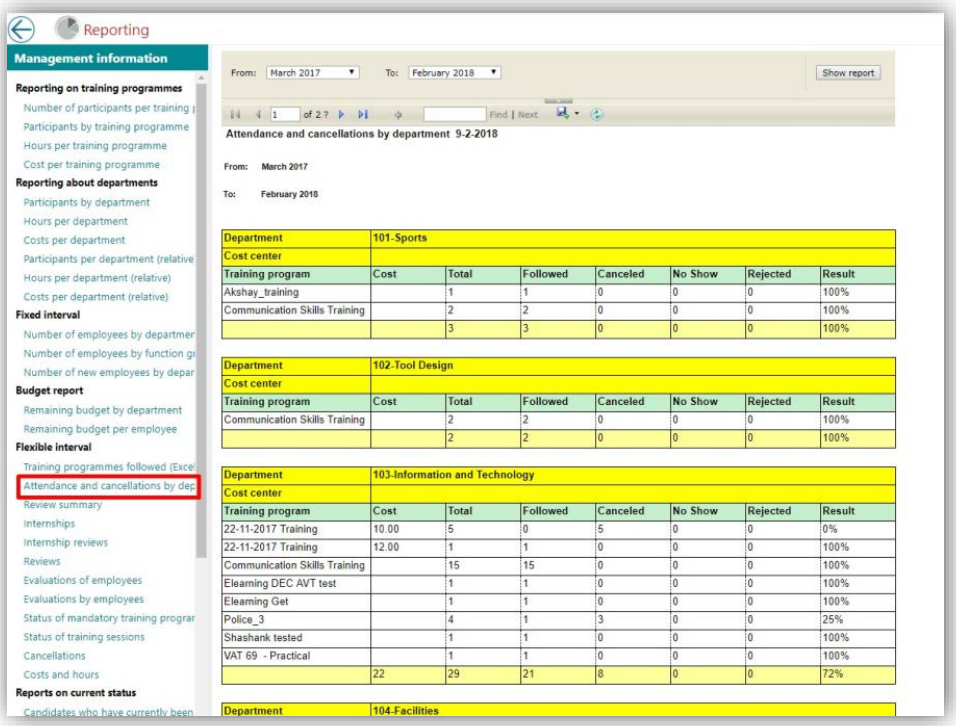
# 5. Report - Attendance and cancellation by department - is translated

## Message

This report has now been translated. The header and other texts in the report are available in several languages.

## Solution

The headers in report *number of new employees by department* have now been translated.




**Please note**: The following items cannot be translated due to limitations in the Microsoft Framework.

1. Tool tip of save, forward and backward icons.
2. 'Find text in report' and 'of' text on the report.
3. Also note that, when the report is downloaded, it will be downloaded with the English report name.

# Solved Messages

## 6. Incorrect budget value shown in email (change # 413878)

### Message

The email information passed onto the employee by an email was showing a wrong budget value. This is also applicable for the department and organizational budget.

### Solution

The email now contains the correct values.

## 7. My function filter was showing no training (change # 414017)

### Message

On the training request page, the training specific for the function profile was not showing any result.

### Solution

The necessary corrections have now been done and the function profile specific training will now be show.

## 8. Deletion of Ad hoc training (change # 418169)

### Message

Even after deleting the ad hoc training, it was still shown on multiple places like the employee profile page and reports.

### Solution

Once deleted the training will now not be shown on employee profile page. The ad hoc training will also not be shown on any reports.

## 9. HTML code presented on training request page(change # 423267)

### Message

Due to an error in creating or editing a training, HTML codes were presented in the training request page

### Solution

Text is now shown in the correct format.

# Changed and Improved

## 10. Show all Ad hoc training – Ad hoc tile

### Message

Any ad hoc training with any status (requested, approved, schedule, reschedule or rejected) will be shown under the ad hoc training page.

## Solution

The current implementation of the ad hoc training page only shows those training courses that are approved and schedule. However, from now onwards, all type of ad hoc training will be shown on the ad hoc training page.
*Learning Management | Adhoc training*

# 11. Show last updated date – Ad hoc report

## Message

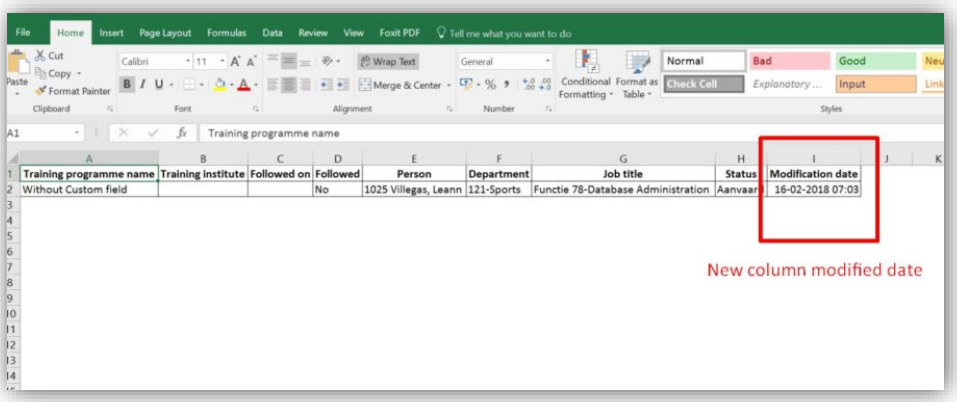
A new column, last updated date, will be shown on the Ad hoc report (excel).

## Solution

When a user downloads an ad hoc report, he or she will be able to see when this training was last updated. This will help the manager or organization to see if any action is needed for that particular training.

**Note:** This column is only available in the report.

*Learning Management | Adhoc training*



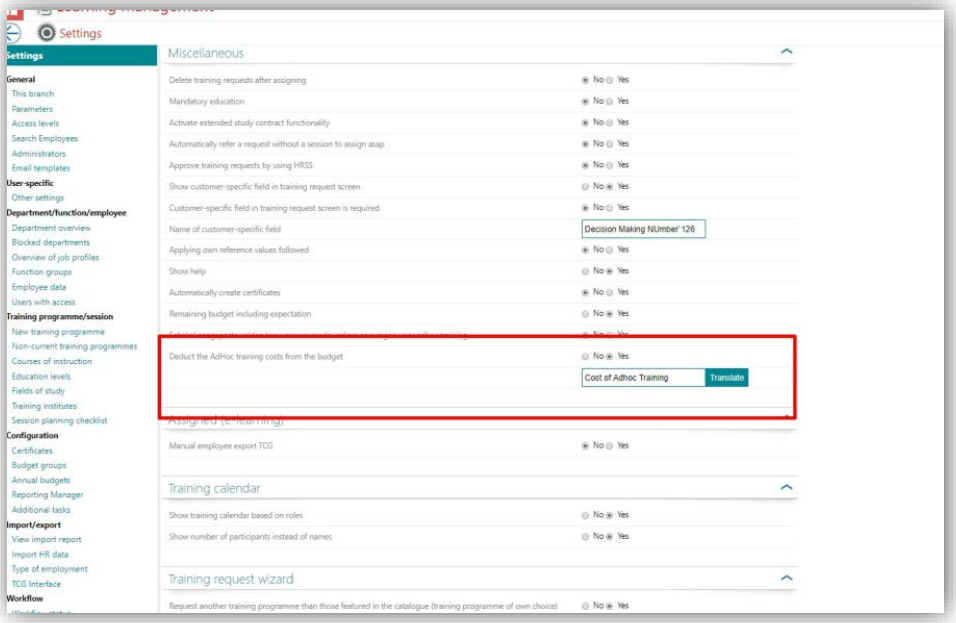

# 12. Own terminology – Cost of Ad hoc training

## Message

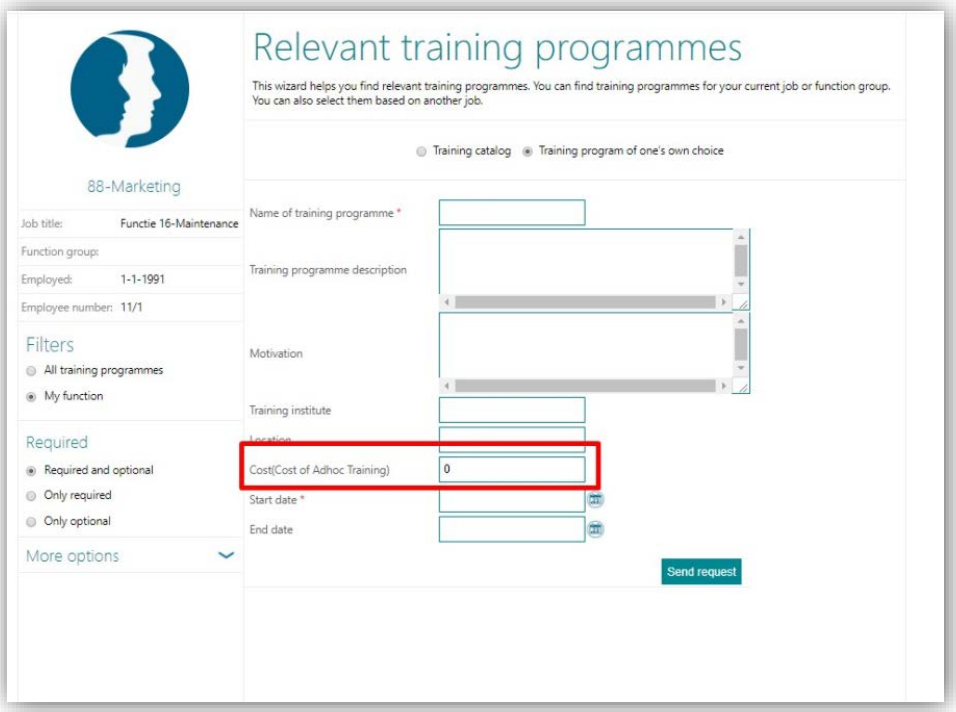
A new own terminology option is added for cost of ad hoc training.

## Solution

The user can now define their own name to the cost of Ad hoc training. The parameter page will provide the option to add this name. Once the user enters this name, it will be used across Learning Management for your organization.
*Learning Management | Setting | Parameter*




After Providing the company specific text the changes can be seen on training request page



# Release Notes
# Learning Management

## Release 2018-02

Version 1.0

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**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change .....) in our system.**

# New

## 1. New option to edit field values entered by an employee

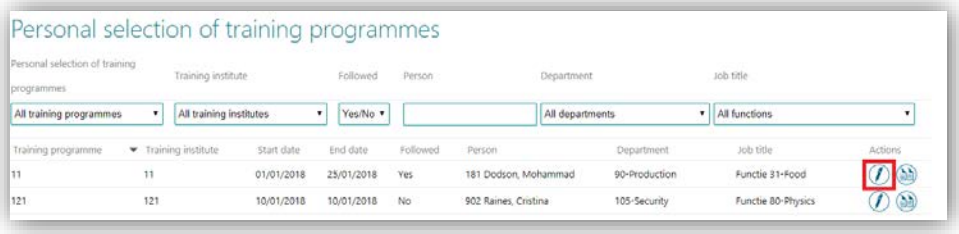
### Why

It must possible for a manager or another authorized user to change some of the values of a personal training course which is requested by an employee.

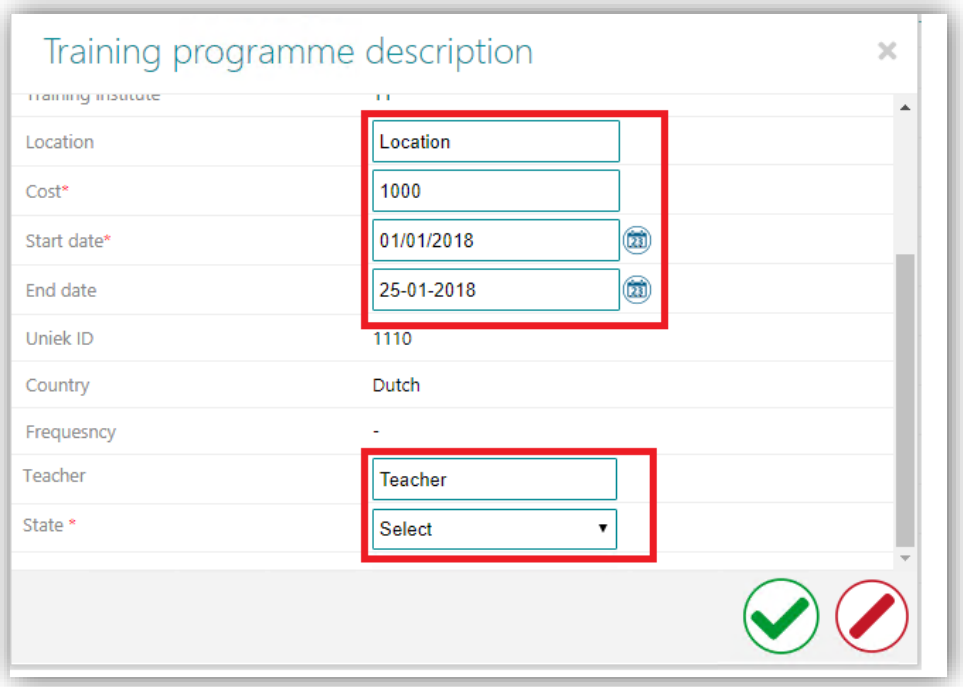
### How

Step 1 : Click on the tile below.

Step 2 : Click the edit icon at the end of the desired row.




Step 3 : You can now make your changes for the indicated fields shown below.




After you have made your changes, you can save these or use the cancel button if changes are not to be saved.

# Changed and Improved

## 2. Two reports translated into Spanish

### Message

Not all reports are in Spanish.

### Solution

The below mentioned reports are now also available in Spanish.

- Number of employees by department
- Number of employees by function group

# Solved Messages

## 3. Wrong date in sending a reminder email (change #399095)

### Message

If an employee followed a training course which took place on several dates, the reminder email for this training course was sent based on the first date instead of the last followed date.

### Solution

The remainder email will be based on the last day that the employee followed this training course.

## 4. Decision making number on requests for training (change #410539)

In Dutch: Besluitvormingsnummer

### Message

When an employee requests a training course, the 'Decision making number' field is not shown.

### Solution

The 'Decision making number' field will now be shown in the description field.

# Release Notes
# Learning Management

## Release 2018-01

Version 2.0

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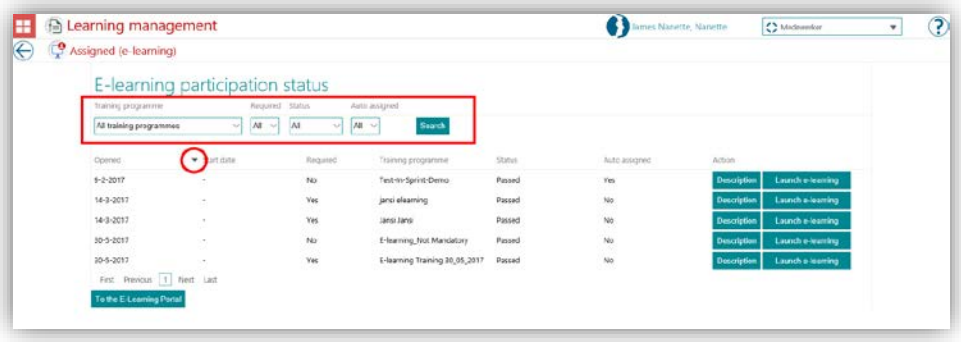
**This document describes the new functionality and improvements introduced by this release. Some of these changes have been inspired by messages and reports from customers. Where relevant, we have included a number in the section title to refer to the identification of the message in question (change .....) in our system.**

# New

## 1. New filters in My e-learnings screen

### Why

In order to improve the search facility in e-learning, employees now can use new filters in the *My e-learnings* screen. Also, each column can now be sorted.




### Your action

No additional action is required. This release automatically provides this new functionality.

# Changed and Improved

## 2. Translated Reports

### Message

The reports are only available in Dutch

### Solution

Currently 7 reports are completely multilingual. We will continue translating the remaining reports in the upcoming releases.

In this release the reports that have been translated are:

- Number of participants per training programme *(Aantal deelnemers per opleiding)*
- Participants per training programme *(Deelnemers per opleiding)*
- Status of current training requirements *(Status actuele opleidingsverplichtingen)*
- Participants by department *(Deelnemers per afdeling)*
- Participants by department (relative) *(Deelnemers per afdeling (relatief))*
- Hours per department (relative) *(Uren per afdeling (relatief))*
- Costs per department (relative) *(Uren per afdeling (relatief))*

# 3. Deduct employee cost of ad-hoc training from the employee budget

## Message

The cost of the ad-hoc training courses are not deducted from the employee learning budget.

## Solution

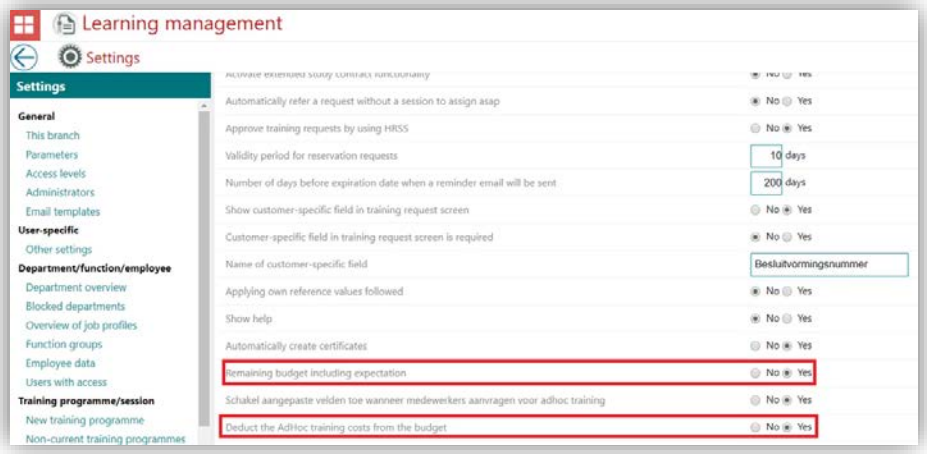
If you want the cost of ad-hoc training courses to be deducted from the employee's budget, you can enable the option within the ***Settings*** page: *Settings* | *Parameters* | *Miscellaneous* | *Subtract the Ad hoc training cost from the budget*

The cost of ad-hoc training courses will be deducted from the employee learning budget according to the *Budget forecast* setting:

- If the *Budget forecast* is enabled:
  - The cost of the ad-hoc training course will be deducted the moment the employee requests the training.
  - If the request is later rejected, deleted, or the employee eventually doesn't follow the training course, the cost of the training is reimbursed in the employee's budget.
- If the *Budget forecast* is disabled:
  - The cost of the ad-hoc training course will be deducted when the employee request is approved and the session is assigned.
  - If the employee doesn't follow the training course, the cost of it is reimbursed in the employee's budget.

The cost will be updated in both the employee budget chart and in the employee budget report.

Note: Remember that you can find the Budget forecast setting in the ***Settings*** page: *Settings* | *Parameters* | *Miscellaneous* | *Remaining budget including expectation*




# 4. Delimiter for Session import file changed into ";"

## Message

The field delimiter for session import was a comma.

## Solution

The fields delimiter in Session import file is now ";". This delimiter is now the same as that already used in the Training import and Training history import files.

# 5. Ad-hoc training requests (export improvements)

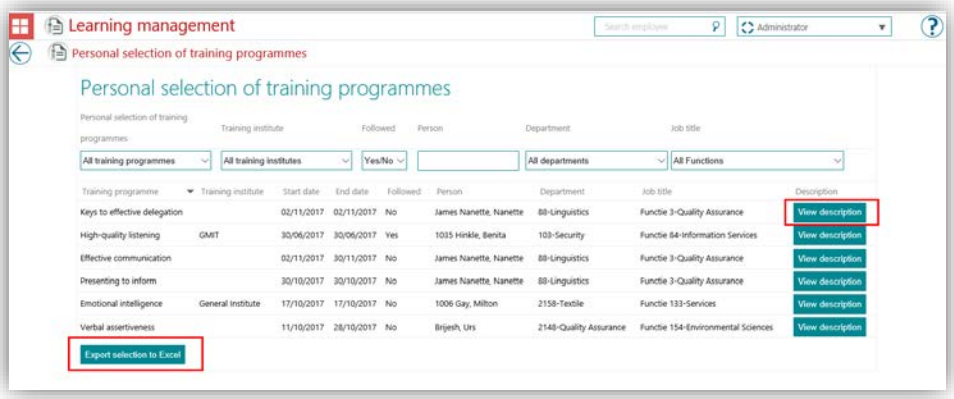
## Message

All custom fields were shown in one column in the Excel file.

## Solution

Once the ad-hoc training is scheduled, managers or admins have an option to see all the custom fields that are requested by an employee in *Personal selection of training programmes* tile. They can also export these additional fields in excel.

To facilitate the data management, **the additional fields are currently exported in separated columns in the Excel file**.



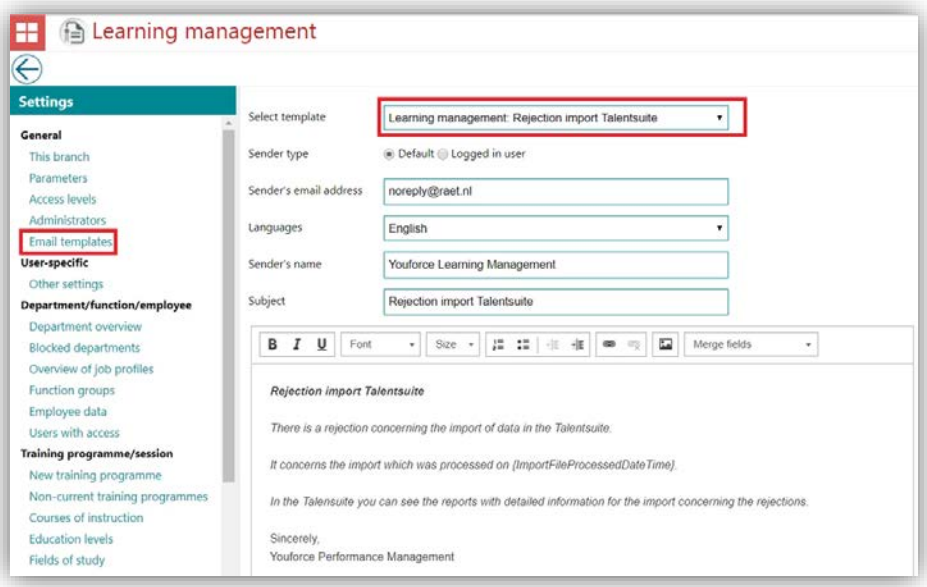

# 6. Email template for import rejections now specific for Learning Management

## Message

When an import operation is rejected, a notification email is sent. This email is however based on a template from Performance Management. There is no specific template for Learning Management.

## Solution

Now there is a specific template for Learning Management available. Customers are now able to define separate email templates for Learning Management and Performance Management.



# Solved messages

## 7. Employee can request already scheduled E-Learnings

### Message

E-Learnings are automatically scheduled for employees. But it is possible to request for the same training once again.

### Solution

With this release the employee is not able to request the training again once it is scheduled.

## 8. Export functionality Certificate page not working correctly

### Message

When exporting to Excel on the Certificate page without applying any filters, the generated Excel file contains empty records.

### Solution

The issue has been resolved. The Excel file will not contain any empty records.