



WORKFORCE SOLUTIONS | TALENT MANAGEMENT | SELF SERVICE



**CONNX V6.3
RELEASE NOTES**

2022

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ConnX Pty Ltd

Level 8

303 Coronation Drive

MILTON QLD

PO Box 1122

MILTON QLD 4064

AUSTRALIA

Ph: 1300 CONNXHR

1300 266 694

Intl: +61 7 3368 2623

Web: www.connx.com.au

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INTRODUCTION

Document Purpose

This document outlines the new features and changes in ConnX V6.3.

Audience

This document is intended for existing clients with ConnX V6.3.

Background

This release includes changes made since ConnX V6.2.SP2

Please refer to the Release Notes provided with that release for a complete list of changes.

[Download the ConnX V6.2 Release Notes](#)

[Download the ConnX V6.2 SP1 Release Notes](#)

[Download the ConnX V6.2 SP2 Release Notes](#)

Compatibility

Please refer to the technical specifications document for more information.

[Download the ConnX Technical Specifications](#)

Security

Please refer to the security overview document for more information.

[Download the ConnX Security Overview](#)

ConnX Support

Please contact the ConnX Product Support Team if you require any assistance.

Contact	Address
Ph: 1300 CONNXHR 1300 266 694 Intl: +61 7 3368 2623 Email: support@connx.com.au	Level 8 303 Coronation Drive MILTON QLD 4064 AUSTRALIA PO Box 1122 MILTON QLD 4064 AUSTRALIA

1.0 MAJOR CHANGES

1.1 New Module Added: Variations

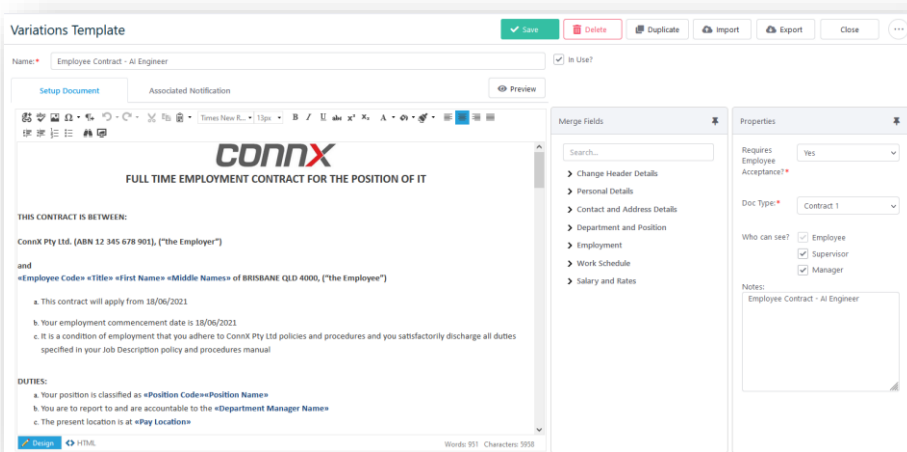
ConnX Variations Module allows to you quickly construct and issue variations to employment contracts, remuneration changes, and employment conditions electronically and efficiently. The intention of this module is to reduce the administrative burden of varied contract changes and allow you automate responses (If needed).

Existing employees will be notified of the changes and have the option of asking for employee acknowledgment prior to making the change, or just be informed of the change in a professional and automated way.

In ConnX Variations stores repository of change templates or you can create your own when required. The security settings automatically apply to ensure only the people who should have access will be able to see the completed document.

- All variations can be quickly created and issued electronically
- Employees can accept variations via their desktop or mobile securely online
- Accepted and Completed variations will be automatically stored in the employee documents file for later reference
- Employees will be able to access their completed variations when they require

This is a new module as part of the ConnX suite – please contact our Sales and Relationships team on 1300 CONNHR or sales@connx.com.au to discuss how Variations can benefit you and your team.



1.2 Employee Vaccinations

ConnX has added the ability to keep track of employee vaccinations. The **Vaccinations** page (*My Details > Personal Information > Vaccinations* on Desktop, *Profile > Vaccinations* on Mobile) allows employees to add their own vaccination details.

Your organisation can decide which types of vaccinations it will record for its employees and who has access to this information. You can customise the Vaccination Type, Dose, and Brand information as well as information on Issuing Bodies. Employees can enter information on when the vaccination was administered, when it is due to expire, when a booster is due, and include further information on the vaccine, including up to five document attachments per record.

The following screen shows the Add New Vaccination screen for an employee.

The screenshot displays the 'Add New Vaccination' form. The form is titled 'Add New Vaccination' and has a close button (X) in the top right corner. The form fields are as follows:

- Type: COVID-19 (dropdown)
- Dose: Dose 1 (dropdown)
- Status: Current (dropdown)
- Date Given: 01/12/2021 (calendar icon)
- Effective until / Expiry Date: (calendar icon)
- Booster/Catch up Due Date: (calendar icon)
- Brand: Pfizer (dropdown)
- Comments: (text area)
- Issuing Body: (not set) (dropdown)
- Workflow Status: (dropdown)

The Attachments section shows a file 'COVID-19 Digital Certificate 20211116.pdf' with a 'Remove' button and a 'Select' button. Below the attachments is a file upload area with the text: 'Drop files here. Remaining Files: 5. Maximum File Size: 100MB'. At the bottom of the form is a green 'Save' button.

The Add Vaccination screen on ConnX Mobile provides the same fields and can be used in the same way as the Desktop screen.

Vaccinations can be set up for workflow approval, in which case one or more approvers have to approve any additions or edits to the vaccination details.

ConnX will automatically send notifications for employees who are due to have their vaccinations expire or are due for a booster or catch-up.

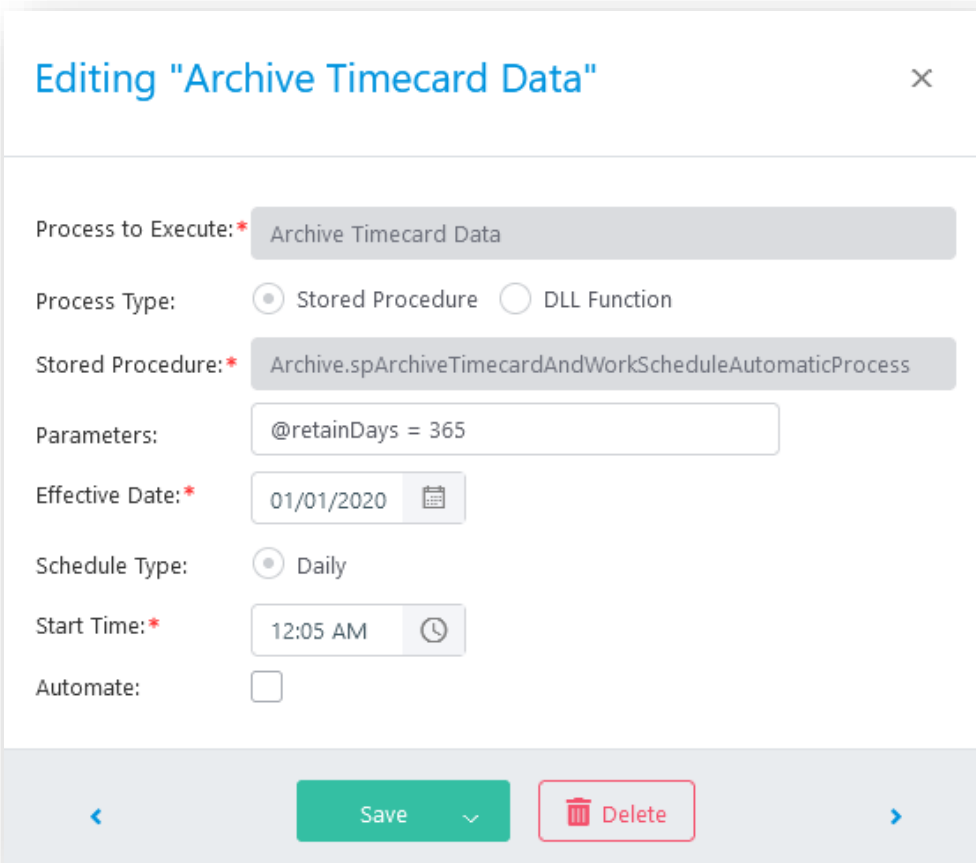
A new report – Employee Vaccinations (ID 41) – has been added to enable reporting users to see the vaccination status of employees.

For more information on Vaccinations in ConnX, please see Appendix A - Vaccinations.

1.3 Timecards Performance Improvement through Archiving

The performance of ConnX's Timecards module, from Timecard entry to Timecard report generation, has been significantly improved by introducing a process to archive older data held in the system. For example, if your organisation decides that any Timecards-related information held in the system for more than 90 days is not necessary for current operations, it is possible to archive information on Timecards from more than 90 days prior.

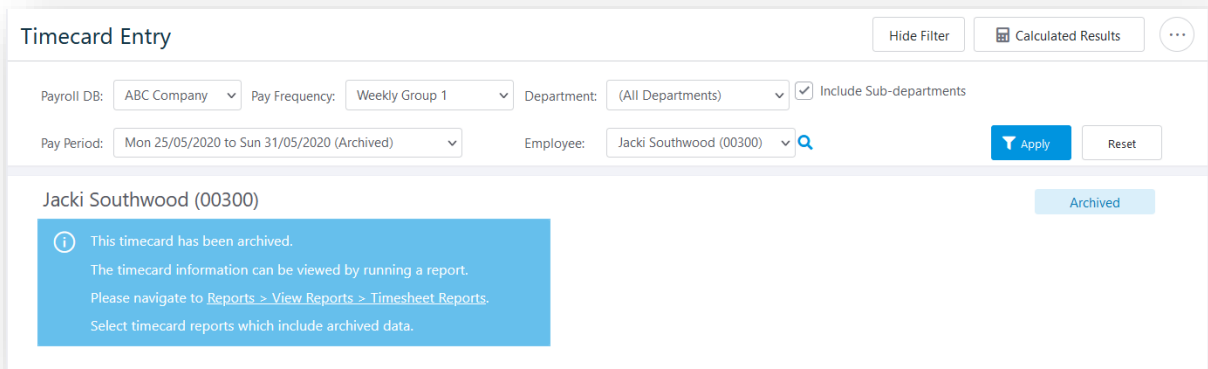
To accommodate archiving Timecard data, a new process - **Archive Timecard Data** - has been added to the ConnX Automated Process Scheduler (*Admin > Setup > Settings > Automated Process Scheduler*). This process allows you to customise the number of days for which current Timecard data is held in the system using the @retainDays parameter. Note that this parameter has a minimum value of 90 days.



The screenshot shows a configuration window titled "Editing 'Archive Timecard Data'". The window contains the following fields and options:

- Process to Execute:** Archive Timecard Data
- Process Type:** Stored Procedure DLL Function
- Stored Procedure:** Archive.spArchiveTimecardAndWorkScheduleAutomaticProcess
- Parameters:** @retainDays = 365
- Effective Date:** 01/01/2020 (with a calendar icon)
- Schedule Type:** Daily
- Start Time:** 12:05 AM (with a clock icon)
- Automate:**

At the bottom of the window, there are navigation arrows and two buttons: a green "Save" button and a red "Delete" button.



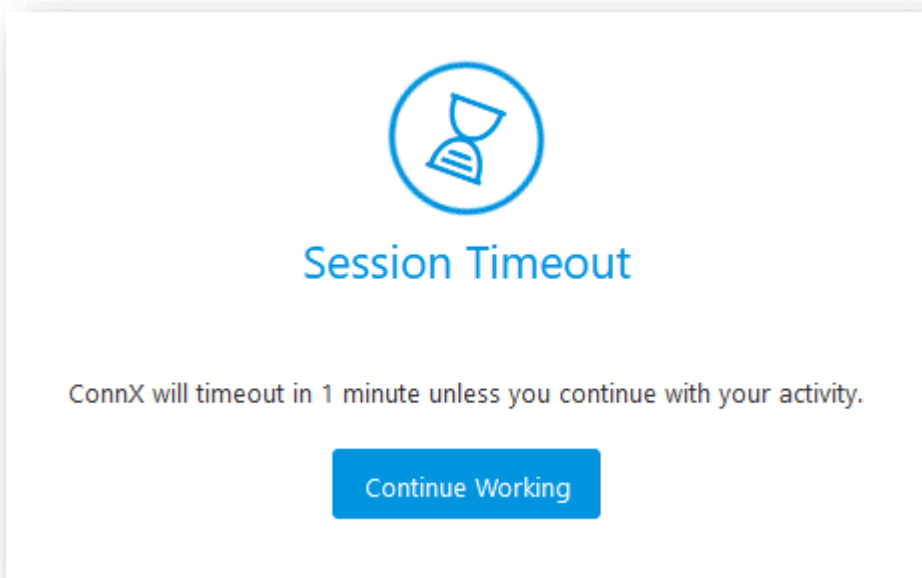
Several reports have been added to the Reports Manager that are similar to existing Timecards reports, but will include archived data. For a list of reports, see 8.1.4 Timecards Reports Including Archived Data.

1.4 Document Viewer

The document viewer has been added to all pages in ConnX where a document can be viewed.

1.5 Session Timeout

The **Session Timeout** popup, which was a browser pop-up window in previous versions, has been changed to a modal, which will only pop up in all open ConnX tabs. This allows users to use ConnX without disabling the popup blocker in their browser.



2.0 BASE

2.1 Welcome Page

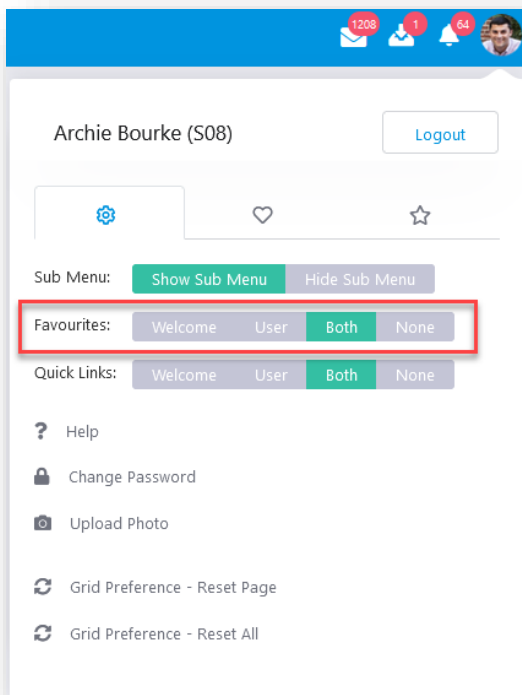
2.1.1 Favourites

The Favourites panel has been re-introduced to the **Welcome** screen. Administrators can set up whether to display the Favourites Panel from the **Welcome – Options** tab in *Admin > Setup > Settings > Display*.

If **Display Favourites** is set to **Show**, the User Menu will display a **Favourites** section. Users will have four options for the display of favourites:

- **Welcome** will show the **Favourites** panel on the **Welcome** screen
- **User** will show the **Favourites** on the **Favourites** tab (heart icon) on the **User** Menu
- **Both** will show both the **Favourites** panel and the **Favourites** tab
- **None** will show neither.

If **Display Favourites** is set to **Hide**, the **Favourites** section in the User Menu will be hidden.



The **Favourites** panel on the **Welcome** screen and on the **Favourites** tab on the **User** menu have also been made more user-friendly.

2.1.2 Issues Resolved

Daily News

Birthdays and Leave will now be correctly displayed even when there are multiple leave applications for an employee.

Trivia

The **Points for each Attempt** fields in the **Welcome –Trivia** tab of *Admin > Setup > Settings > Display* will now accept 0 (zero) as a value in **Three Strikes** mode.

Welcome Widgets

Added support for MP4 videos to be directly uploaded through a widget.

Login Page

Fixed an issue (“Validation of Viewstate MAC failed”) that prevented users from logging in.

2.2 Workflow

2.2.1 Workflow Tasks

My Team > My Team > Monitor Workflow Tasks

The notifications sent for Workflow Tasks will now contain the employee the workflow task is for, unless the workflow task is for the user themselves. The notifications will now contain a reference or a link to the My Tasks/Reminders page.

2.2.2 Issues Resolved

Removed unwanted HTML tags from the **Description** column that appeared when the grid on the **Task Set Monitor** page was exported to MS Excel (.xls).

A manager monitoring the tasks for his employee can now see all tasks in the task set that have already been triggered.

2.3 My Details

2.3.1 Bank Accounts

My Details > Pay > Bank Accounts

To make the **Bank Accounts** screen more user-friendly, the filters at the top of the grid have been removed. Furthermore, when there is an unprocessed request to change bank accounts, the yellow alert message will be displayed above the grid rather than below it, so that it is more visible.

BSB Code	Account #	Bank Name	Account Name	Type	Pay Amount	Balance of Pay	Pay Order
036-189	987887744	WBC	BOURKE, ARCHIE		\$0.00		0
084-293	818292839	NAB	BOURKE ARCHIE		\$180.00		1
084-090	121213333	National Australia Bank	Knight Zane		\$50.00		2

2.3.2 Issues Resolved

My Details > Leave > Leave Application - New

An employee applying for more than 999.99 hours of leave is now able to do so.

RDO now calculates the correct hours for leave applications that are split over multiple pay periods.

The **Leave Relationship** dropdown will now display correctly when applying for multi-day leave.

2.4 My Team

2.4.1 Employee Notes

My Team > My Team > Employee Notes

My Details > Personal Information > Employee Notes

Basic rich text functionality has been added to the **Add**, **View**, and **Edit** screens of **Employee Notes** to allow text to be customised according to user needs.

Add New Employee notes ×

Who can see: Employee Supervisor Manager HR Admin Admin

Employee: ▼

Include Terminated

Title/Short Description:

Category: ▼

Notes:

Follow Up/Responses:

Attachments:

Drop files here.
Remaining Files: 1
Maximum File Size: 100MB

2.4.2 Disciplinary Events

My Team > My Team > Disciplinary Events

My Details > Personal Information > Disciplinary Events

Full rich text functionality has been added to the **Add** screen of Disciplinary Events, allowing customised content to be added to disciplinary events, in terms of formatting.

Add New Disciplinary Event

Employee:* Category:*

Recorded By: ARCHIE Bourke Date:*

Details:*
 -apple-syste... 13px B / U abc x² x₂ A -
 Written Warning given to Andy Taylor for incident at Ritz Hotel.
 Design HTML Words: 11 Characters: 65

Employee Can View this Disciplinary Event?

Attachments:

 Drop files here.
 Remaining Files: 1
 Maximum File Size: 100MB

2.4.3 Employee Qualifications

To improve access and usability, the **Attachments** column has been added to the grid on the **Employee Qualifications** screen (*My Team > List Employees – Personal > Documents*). This removes the need to open the qualification to see any attachments included. All documents attached will be displayed on one cell and selecting an attached document will open it in the in-built document viewer. Furthermore, on the **Qualification Approval** page, the **Employee Name** will be set to Preferred Name + Surname if there is a preferred name set up.

2.4.4 Issues Resolved

Leave Notifications

The subject line of the notification sent when leave is rescinded by a manager has been changed from "Notification of DENIED Leave Application" to "Notification of Rescinded Leave Application".

My Team > My Team > Leave Forecast

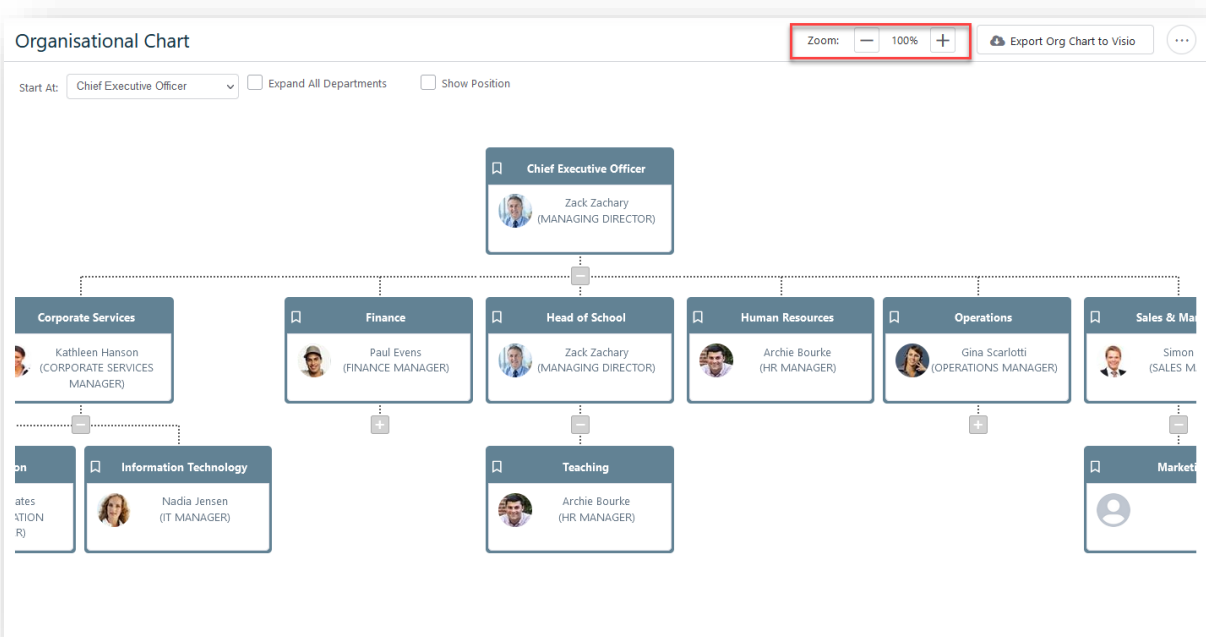
The grid in the **Leave Forecast** page will now show the correct values regardless of if **Display** is set to **Hours** or **Days**.

2.5 Company Info

2.5.1 Org Chart by Department

Company Info > Company Information > Org Chart by Department

The **Org Chart by Department** now includes Pan and Zoom Functionality. The Zoom function allows users to zoom out to as much as 30% and zoom in to as much as 1500%. The current zoom level is indicated between the **Zoom In** and **Zoom Out** buttons. Additionally, Ctrl + mouse scroll will also zoom in and out of the chart. The Pan function allows users to click and move the chart. Scrolling the mouse will pan the chart up and down.



2.5.2 Issues Resolved

Company Info > Administration > Departments

ConnX will no longer allow a department to be deleted if it has a cost account linked to it.

Company Info > Company Information > Employee Directory

The grid on the **Employee Directory** page can now be exported to CSV or an Excel file including all records regardless of the number of records in the grid.

2.6 HR Admin

2.6.1 Issues Resolved

HR Admin > HR > File Import

The import log has been fixed so that it contains the list of errors when an import has failed.

HR Admin > HR > Perform Export

The **Export Transactions** page now prints with the correct page formatting.

HR Admin > HR > Manage New Employees

To improve compatibility with MicrOpay, the **New Starter** page now allows spaces to be added to the middle of an employee code, but will truncate any leading or trailing spaces.

When the details of a manager are being sent from ConnX to Onboard Centre, the manager's work mobile number will be sent.

The grid in the **Leave & RDO Details** section of the **New Starter** page has been improved for visibility and compatibility with smaller displays.

HR Admin > HR > Workflow Approval Items

Fixed an issue that was causing the Workflow Approval Items screen to time out for restricted Administrators and restricted HR Administrators.

Workflow Forwarding

It is now possible for HR Administrators to Forward Workflow using the following pages:

- Workflow Approval Items (*HR Admin > HR > Workflow Approval Items*).

- Maintain Employees (*HR Admin > HR > Maintain Employees – Select Employee - Workflow > Current WF Approval Items*).
- Pending Leave Report (*HR Admin > HR > Process Leave Applications – Select **Pending Leave** on the top menu – Select Leave Application and select **Forward** in the row you want forwarded.*

2.7 Admin

2.7.1 Workflow Actions

Admin > Setup > General > Workflow Actions

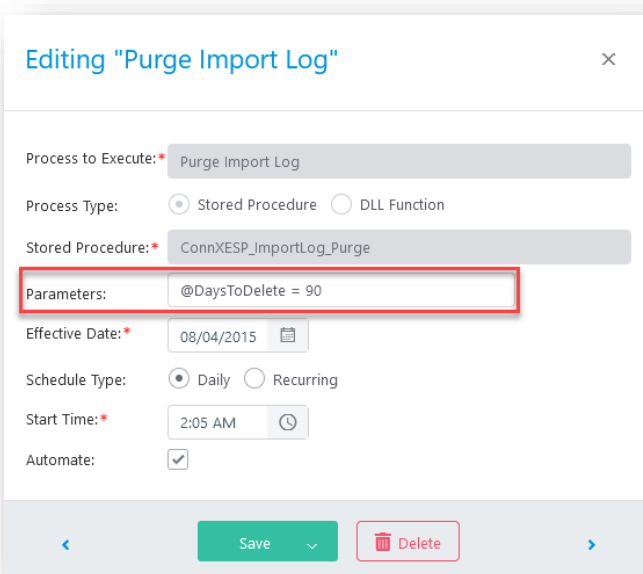
The **Exceptions** sections will be hidden for **Workflow Actions** where **Use Org Chart** has been set to **Y**. When a **Workflow Action** is selected from the grid, the **Exceptions** sections will be shown or hidden accordingly.

2.7.2 Automated Process Scheduler

Admin > Setup > Settings > Automated Process Scheduler

Clean up of Import Log

The Purge Import Log process in the Automated Process Scheduler has been updated so that the number of days for which import data is logged in the system can be specified. The Parameter @DaysToDelete can be used to specify the number of days that you want to retain the import log. Note that this number has to be greater than or equal to 31.



The screenshot shows a dialog box titled "Editing 'Purge Import Log'". The dialog contains the following fields and options:

- Process to Execute: * Purge Import Log
- Process Type: Stored Procedure DLL Function
- Stored Procedure: * ConnXESP_ImportLog_Purge
- Parameters: @DaysToDelete = 90 (highlighted with a red box)
- Effective Date: * 08/04/2015
- Schedule Type: Daily Recurring
- Start Time: * 2:05 AM
- Automate:

At the bottom of the dialog, there are "Save" and "Delete" buttons.

Automated Process Scheduler - Issues Resolved

CAP will now check if an employee has been terminated before tasks are triggered for them.

The birthday and anniversary reminder notifications will contain an employee only once even if they report to the same manager in multiple departments.

2.7.3 Issues Resolved

Admin > Setup > Settings > User Defined Fields

The User Defined Field template **Terminate Employee** has been removed from ConnX, as it is no longer in use.

Admin > Setup > Settings > Page Security

Fixed a full-page error encountered on the Page Security for Additional Information when there are records of additional information fields from payroll system but none from ConnX.

iCals with Leave Notifications

iCals will now be attached to custom leave types as per the Email Settings on the leave type.

3.0 BUSINESS INTELLIGENCE

No substantial changes have been made.

4.0 LEARNING & EDUCATION

4.1.1 Courses

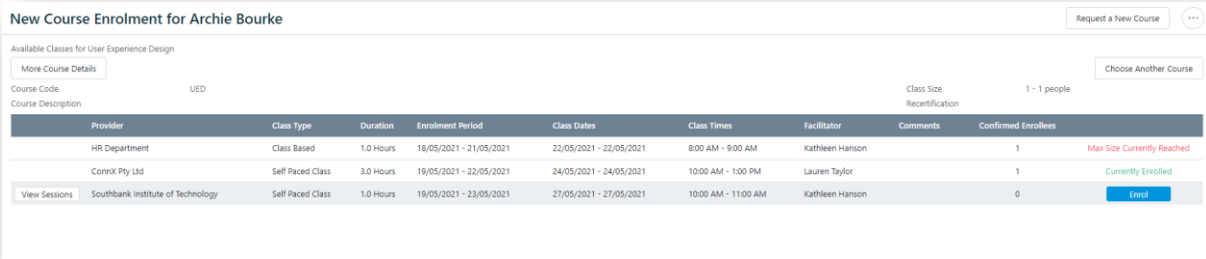
Learning > Courses > Courses

To control the number of enrollees to a course, a control has been added that will restrict the number of people who can be enrolled in a course. While it was already possible to specify the maximum number of enrollees to a course, this number was not enforced from within ConnX. The **Restrict enrolment when the number of confirmed enrollees reached max size** checkbox has been added for this purpose. This restriction has been reflected in other areas of the Learning and Education module, as detailed below.

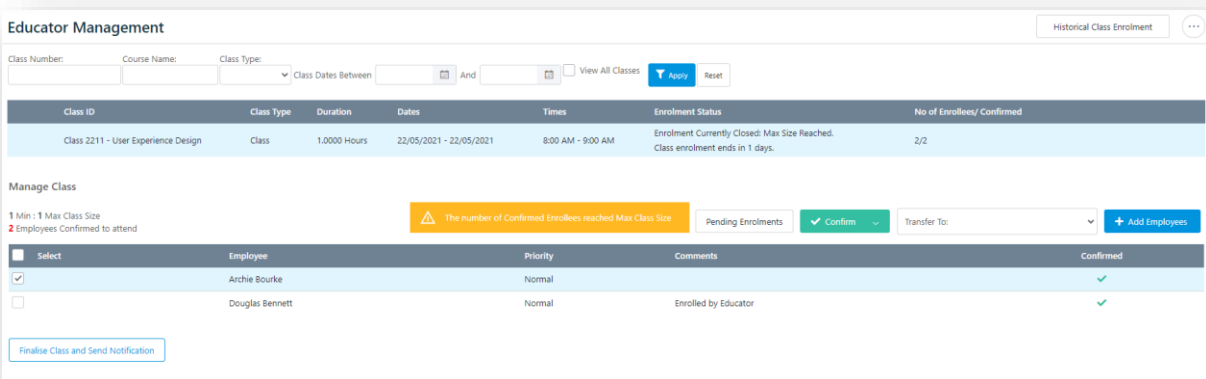
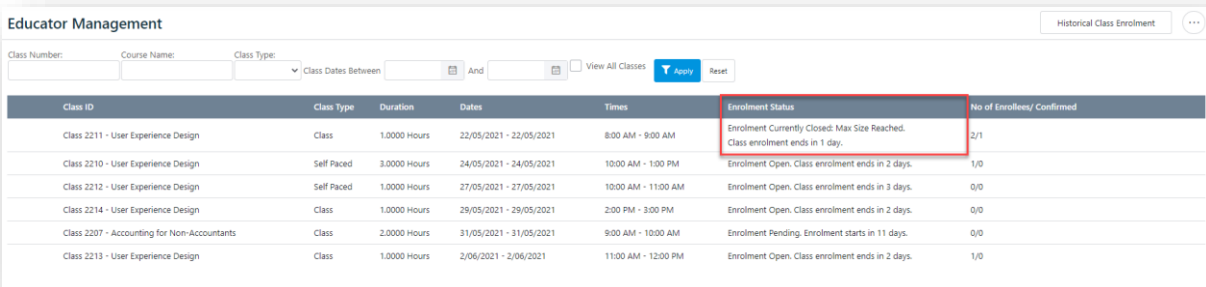
The screenshot shows the 'Training Courses' configuration page. The 'Restrict enrolment when the number of confirmed enrollees reached max size' checkbox is checked and highlighted with a red border. Other visible fields include 'Course Category' set to 'Finance', 'Course Code and Name' set to 'ACC5', 'Course Description' with a text area containing 'Provides a thorough understanding to managers on business accounting practices, etc.', 'Course Web' set to 'localhost/ConnX44b1/policies/Training/Litigatio...', 'Exclude Course from Waiting list' unchecked, 'Min and Max Size' set to '5 to 15', and 'Internal or External' set to 'External'.

The **Confirmed Enrolees** column has been added to the grid in the **New Course Enrolment** screen, which indicates the number of enrollees for that course. The last column of the grid now includes the enrolment status, which can be **Currently Enrolled** (Green Text), **Max Size Currently Reached** (Red text) or the blue **Enrol** button, which

allows you to enrol for that course. The **Max Size Currently Reached** text will appear only if **Restrict enrolment when the number of confirmed enrolees reached max size** is selected in the Courses screen.



In the Educator Management screen, the Enrolment Status of a course with **Restrict enrolment when the number of confirmed enrolees reached max size** selected and has reached the maximum allowed number of enrolments will be set to “Enrolment Currently Closed: Max Size Reached. Class Enrolment Ends in X days”, where X is the number of days remaining. Furthermore, when the course is selected from the top grid in the page, a yellow warning alert message will be displayed above the grid of enrolees, stating “The number of Confirmed Enrolees reached Max Class Size”.



The search function in the **Courses** screen has been changed to search for the record where the **Course Name** contains the search criteria.

4.1.2 Issues Resolved

Learning > Courses > Course Skills

Skills linked to a course will now flow into the skills register of employees when they finished the course even if the skills do not have a level specified. Also, the **Skill** and **Level** fields in the **Add Skill to a Selected Course** section are now mandatory fields.

Learning > Learning & Education > New Course Enrolment – Request a New Course

The **Course Name** field in this screen is now a mandatory field.

Request a Course

Requested By	Requested	Code	Course	Description
ARCHIE Bourke	1/08/2014		MS Excel	Excel basics
ARCHIE Bourke	6/09/2018	BS001	Business management	Business management

Requesting Course Details

Course Code

Course Name*

Course Description

Course Starts

Course Web

Cost per Employee \$

Course Comments

Request a Course

Course Details

Removed the **Approvers** section that users saw when they viewed details of a course in which they are enrolled.

Historical Learning Classes

Historical Learning Classes can no longer be created with a start date later than the end date.

Importing Historical Training Courses

When importing employee historical training courses, if the course name and course code combination does not exist in ConnX, only one new course record is created, even if the combination appears in the import file multiple times.

5.0 MOBILE

5.1.1 Issues Resolved

Company Info > Employee Directory

Improved the performance of the **Employee Directory** screen by changing the way employee images are stored in the system.

Timecard > Timecard Totals

Timecard based employees accessing their timecard totals (*Timecard > Timecard Totals*) will now see their totals displayed correctly for each day.

Administrators logged in to the Timecard Totals page (*Timecard > Timecard Totals*) are now able to see users with access level Supervisor, Manager, and HR Administrator in the **Employee** drop-down list.

Mobile Workflow Approval

If the Approval Password setting is enabled, users will no longer be able to approve or deny Workflow items from the Mobile Workflow Inbox without a password when a password has not been set.

Mobile Timecards

The Timecards Quicklinks icon will now be displayed on the Mobile welcome screen, if enabled.

6.0 PERFORMANCE REVIEWS

6.1.1 Review Forms

Performance > Administration > Review Forms

Older review forms that are no longer used can now be set to not in use by un-checking the **In Use?** setting on the review form. Not in use review forms will be shown at the bottom of the forms list under a "Not In Use" separator on the following pages: Review Instances, Extract Review Answers, **Departments/Participants**, and **Review Forms**. This will not affect any current or past review forms already released to employees or managers.

Instructions have been added to inform users how to set a Review Form to be not in use:

"This review form can be set to not in use after all Employee Review Instances are locked in *Performance > Officer > Review Instances*"

6.1.2 Next Due Dates

Performance > Officer > Next Due Dates

The following warnings will appear when selecting a Review Type if invalid configuration is detected

- "The selected review type does not have a review form. You will be unable to create a due date record using this review type"
- "The selected review type does not have a review form that is in use. You will be unable to create a due date record using this review type."

6.1.3 E-Mail Notifications

Email notifications have been updated so that participants receive better information. Notifications now include due date, role of the employee under review (for notifications sent to participants only), and instructions on how to access the review form.

6.1.4 Review Instances

Performance > Officer > Review Instances

Show not in use checkbox has been added as a filter to this page.

6.1.5 Performance Review Meeting

Performance > Performance > Performance Review Meeting

Character limits have been applied to the **Place**, **People**, and **Comments** fields as

- 50 characters for **Place** and
- 50 characters for **People** and
- 200 Characters for the **Comments** field

6.1.6 Issues Resolved

Performance > Performance > Current Reviews

HTML tags are no longer displayed in tooltips and labels

Increased the character count for answers in **Goal Review** section from 2000 to 5000.

Notifications are now sent to all participants correctly when standard and custom participant names are used, participants with custom names were previously not receiving some notifications.

Performance > Administration > Review Forms

You no longer need to refresh the Review Form page before Previewing the review.

Performance > Officer > Next Due Dates

Selecting the **Review Type** now correctly re-calculates the **Calculated Creation Date** in all circumstances.

7.0 RECRUITMENT

7.1 Recruitment

7.1.1 Vacancies

Recruitment > Recruitment > Vacancies

The **Advertising** section of the **Advertising and Agencies** tab for **Vacancies** has been revamped to make publishing vacancies more intuitive. The Media form has been changed from using multiple tabs to showing the relevant fields for the selected **Media Source** in a single form. The Advertising grid has a new column **View Job Ad** with buttons to link to job advertisements published on Seek or ConnX Careers.

After publishing to Seek, a new Actions dropdown list will show after the vacancy has been advertised and includes options to view the Seek log or remove the vacancy from Seek.

The changes to each of the media is described below:

Seek API 2017

The form now has four sections:

- Media Source
- Select your Seek Search Criteria
- How your Ad will look
- Contact Details.

Once published, the advertisement status will appear at the top of the section. The **Actions** drop-down will have the options **Remove from Seek** and **View Log**.

The new **Candidate Apply Process** field sets the how applications will be received from candidates. The options are:

- **Use Seek** – The candidate will apply directly on the Seek website.
- **Use ConnX Careers** – The candidate be linked to job on ConnX Careers. To use this option a ConnX Careers advertisement must be created at the **Vacancy Status** must be set to **Accepting Applicants** before creating the job advertisement for Seek.

- **Use Custom Website Link** – The candidate can be linked to any website or applicant tracking system by specifying a URL of the webpage where the candidate can apply.

Media Source: Seek

Expired

Expires On: 07 October 2021

Published On: 07 October 2021

Actions ▼

Budget Remaining: \$0.00

Advertising Cost: * Update Defaults:

Standout?: ▼

Process Applicant Email: *

Notification: Notify Recruiter when Published

Candidate Apply Process: ▼

Seek Screen ID:

Select Your Seek Search Criteria

Classification: * ▼

Sub-Classification: * ▼

Work Type: * ▼

Seek Location: EuropeRussia/RussiaEasternEurope

Salary Type: * ▼

Show Salary?: ▼

How your Ad will look

Video URL:

Video Position: ▼

Seek Extra Details: Display message in Seek regarding Residents Only applicant
 Job is applicable to recent graduates and entry level candidates

Contact Details:

Name:

Mobile:

Work Phone:

Email Address:

Media Comments:

ConnX Careers

The form now has a single section. Once published, the advertisement status will appear at the top of the section.

Media Source: **cxcareers.com**

Current
View Job in Careers

Budget Remaining: \$0.00

Advertising Cost: * Update Defaults:

Advertising Start Date: *

Advertising End Date:


Publish To: Available Jobs Expression Of Interest

Media Comments:

Broadbean

The Broadbean form is now contained in a single section.

Media Source



i
You need to advertise the vacancy on ConnX Careers before you can advertise it on Broadbean.

Select Media: *

Industry:

Job Types:

Media using Custom eRecruitment source templates and media not using eRecruitment

These two types will have similar forms, which have two sections **Media Source** and **Contact Details**.

7.1.2 Applicant Correspondence

The **Applicant Correspondence** screen has made more user-friendly and intuitive. Among the major changes are

- Revamping the page heading to be more succinct and informative
- Reducing clutter (e.g., the word "STEP" in all steps)
- Replacing the black box with the grey background that contained the correspondence types with a more streamlined radio button group
- Removing unnecessary bold text from the labels in step 3.

Applicant Correspondence: Maintenance Officer (VAC0058)
Finalise Vacancy
Close
⋮

1. Select Correspondence Type:

Send Other Correspondence
 Send Unsuccessful
 Send Successful

2. Select Applicant(s) you wish to Notify:

Drag a column header and drop it here to group by that column

Code	Name	Status	Notified	Ranking	Offered Role	Salary Offered	Accepted Offer	Applicant Media / Agency	Applicant Score	Is Employee
<input type="checkbox"/> APP0138	Ben SIMMONS	Application Received	<input type="checkbox"/>	3	<input type="checkbox"/>		<input type="checkbox"/>		7	No
<input type="checkbox"/> APP0139	Jack MILLER	Application Received	<input type="checkbox"/>	2	<input type="checkbox"/>		<input type="checkbox"/>		0	No
<input type="checkbox"/> APP0135	Jenny JONES	Offered - Awaiting Acceptance	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	58000.00	<input checked="" type="checkbox"/>		22	No
<input type="checkbox"/> APP0136	Ritche MCCAW	Short Listed	<input type="checkbox"/>	4	<input type="checkbox"/>		<input type="checkbox"/>		6	No

Refresh

Page 1 of 1, Items 1 to 7 of 7

3. Insert Correspondence

Correspondence Method: Email Manual (Phone, Print, etc.)

Select Notification Template: (Not Set) Or [+ Create New](#)

Subject:

Body:

Insert into Subject/Body:

- <@ApplicantName> Applicants Name
- <@ApplicantFirstName> Applicant First Name
- <@ApplicantSurname> Applicant Surname
- <@VacancyName> Vacancy Name
- <@SenderName> Senders Name
- <@PositionName> Vacancy's Position Name
- <@RoleName> Vacancy's Role Name
- <@Date> Current Date at time of Sending

Note: all tags are case sensitive

On Send Email, update Vacancy Status

[Send Email](#)

7.1.3 Recruiter Notifications

When a new job application has been received and if a recruiter has set up email notifications, the email notification sent will now contain a link to the ConnX login URL allowing quick access to view the application within ConnX.

7.1.4 Dashboard

Recruitment > Recruitment > Dashboard

The pie charts on the two tabs in the **Recruitment Dashboard** has been improved so that the sections of the pie chart will have distinct colours regardless of the number of sections.

7.1.5 Vacancy Noticeboard Settings

The message next to the **Only show to Employees with an Employee Security Level** setting in the **Vacancy Noticeboard Settings** for a given vacancy has been slightly modified to read "(System Admin, HR Admin and Recruiters will still see the vacancy)".

The **Responsibility** field on the **Vacancy Noticeboard Settings** has been modified to accept up to 4000 characters.

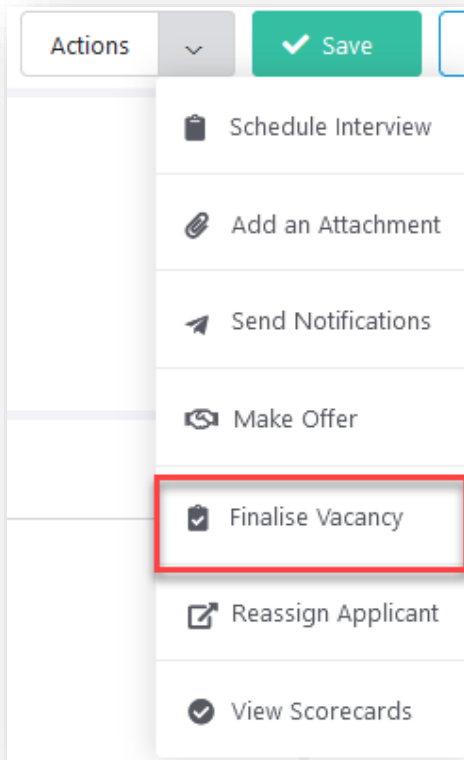
7.1.6 Vacancy Noticeboard

Recruitment > Recruitment > Vacancy Noticeboard

When the **Advertise Date** specified for a vacancy is a future date, the vacancy will be posted from the date specified instead of posting all vacancies on the Vacancy Noticeboard immediately if **Display on Noticeboard** is selected.

7.1.7 Finalise Vacancy

Finalise Vacancy has been added to the **Actions** drop-down list in the **Vacancies** and **Applicants** pages. Select **Finalise Vacancy** to go to the **Finalise Vacancy** page.



7.1.8 Additional Fields

To accommodate larger set sizes, the character limit of the **Lookup Options** field in **Additional Fields** has been increased from 1000 characters to maximum.

7.1.9 Issues Resolved

Recruitment > Recruitment > Applications

The preferred name, if available, will always be used in the **Panel Member** field in the **Scorecards** grid.

Recruitment > Recruitment > Vacancies

Every vacancy created will now automatically have the vacancy checklist attached to it.

Users will now be able to edit the search term being typed into the search textbox of the Vacancies page using arrow keys without the cursor jumping to the right.

ConnX will always check for duplicate vacancy codes when adding a new vacancy and show an error message if the vacancy code already exists.

Screening questions in a vacancy published to ConnX Careers will always appear in the correct order.

For vacancies published to Seek, the **View Log** button would previously appear only when a vacancy has been successfully published. This has been changed so that the log can be seen regardless of whether the vacancy has been successfully published.

Recruitment > Administration > Locations

Users are now unable to delete locations that are in use within ConnX.

Recruitment > Administration > Media

The **Standard Cost** field in the **Media** page will now allow decimal numbers only, with the exception of a leading "\$". E.g., "\$50.00"

Screening Tab

The Override Column setting will now retain its value after being saved in all instances.

Resolved an issue which sometimes caused an error to display when attempting to add a new vacancy with an unsaved vacancy open.

Applicant Correspondence

Choosing **Manual** Correspondence Type, will automatically populate **Contact Date** and **Contact Time** with current date and time.

Selecting **Set Applicant as Notified** when **Contact Date** is blank, the current date and time will be inserted to the grid, and the selected applicant(s) will be flagged as notified.

When an applicant is successfully notified – by email or manually – **Applicant Notified** will be checked for the applicant in the grid. If email notification fails, applicants will not be flagged as notified.

Left Panels of Vacancies and Applications Pages

The filtered results in the left panels of the **Vacancies** and **Applications** pages will always move to the top of the results to make the results immediately visible.

Vacancy Noticeboard Settings

Several issues have been found and corrected in the **Applicant Correspondence** screen. When **Manual** is chosen as the Correspondence Type, the **Contact Date** and **Contact Time** fields will now be automatically filled with current date and time. When **Set Applicant as Notified** is selected and the Contact Date field has been set to blank, the current date and time will be inserted to the grid, and the selected applicant(s) will be flagged as notified. Furthermore, when an applicant is successfully notified in either method – Email or Manual – the applicant notified checkbox value should be checked for the applicant in the grid. In case the Email notification fails, applicants will not be flagged as notified and the notified checkbox will not be checked.

Employees in a specified department and its sub departments can now see the vacancy in the **Vacancy Noticeboard**.

Email Notifications

Recruitment notification emails sent to candidates will no longer have links to ConnX.

7.2 ConnX Careers

7.2.1 Issues Resolved

If an applicant applies for the same vacancy more than once from ConnXCareers, the application will now be updated with the newest information submitted. If the applicant is a non-employee, all changes will be reflected. If the applicant is an employee, only the screening data and attachments will be updated.

It is now possible to set the maximum number of applications to import at each interval, enabling subsequent imports to process the additional applications. This maximum number (default 30) can be changed in the ConnXCareers Admin User Management area by a super user by changing the value of the newly added **Max no. of applicants per import** text field.

Fixed an issue that was causing the **Thank You** popup in ConnXCareers to not open in certain instances.

If a job listing in ConnXCareers displayed in an iFrame has an **Apply with Seek** link, it will now open the link in a new browser tab. This resolves an issue that caused **Apply with Seek** links that were within iFrames to not open.

8.0 REPORTS MANAGER

8.1.1 ID 40 – Employee Master Information

To improve clarity, the **Formulas** and **Description** text for the Employee Master Information report (ID 40) has been changed to the following:

- **Formulas:** "Employee is not terminated. Sorted by employee's first name."
- **Description:** "This report is designed to export to Excel. List of current employees with employment and personal details."

The default security settings have also been changed so that Manager and Supervisor user access levels are left unchecked.

8.1.2 ID 59 – Turnover Index Report

The Turnover Index report (ID 59) has had several descriptions added to it to improve user understanding. These include notes on

- Employee Turnover by Year graph
- The crosstab per year broken down by department
- The Employee Turnover by Month and Year graph
- The crosstab per month and year broken down by department.

8.1.3 ID 359 – Employee FTE Establishment

The Employee FTE Establishment report (ID 359) now includes the Position Code.

8.1.4 Timecards Reports Including Archived Data

Several new Timecard Reports, which are similar to existing Timecards reports, but will include archived data, have been added. These reports include the following:

- ID 600 – Interpreted Timecard Report – Includes Archived Data
- ID 601 – Interpreted Timecard Report by Department - Includes Archived Data
- ID 602 – Interpreted Timecard Report by Date - Includes Archived Data
- ID 603 – Interpreted Timecard Report by Employee - Includes Archived Data
- ID 604 – Interpreted Timecard Report with Cost Account - Includes Archived Data
- ID 605 – Interpreted Timecard Report by Cost Account - Includes Archived Data

- ID 606 – Interpreted Timecard Report with Cost Account by Employee - Includes Archived Data
- ID 607 – Timecard Approval Report - Includes Archived Data
- ID 608 – Timecard - Annualised Salary Cost Summary (Included) - Includes Archived Data.
- ID 609 – Timecard - Annualised Salary (Included) - Includes Archived Data
- ID 610 – Timecard - Annualised Salary (Excluded) - Includes Archived Data
- ID 611 – Timecard - Annualised Salary (Included and Excluded) - Includes Archived Data

It should be noted that since these reports include archived data, the generation of these reports may take significantly longer.

8.1.5 Issues Resolved

Multiple Reports

Fixed the filter **Include Sub Positions**, which was causing errors for several reports owing to an issue in passing parameters.

ID 29 – VISA Details by Department and Employee

Corrected an issue where the **Visa Type** filter, which had been correctly set up to show in the filter criteria for the report, was not being displayed.

ID 450 – Incidents by Incident Type

Fixed an issue where in rare instances, this report would display a blank **Person Involved** field even though an employee or person has been assigned to an incident.

ID 507 - Employees Actual Hours vs Rounded hours per shift

Fixed an issue with this report erroneously showing unit-based clockings.

9.0 ROLES & POSITIONS

9.1.1 Additional Fields

To accommodate larger set sizes, the character limit of the **Lookup Options** field in **Additional Fields** has been increased from 1000 characters to maximum. The **Lookup Options** field for **Roles** is the only field that is editable, and a warning is displayed stating that changing lookup options may affect existing records.

Editing "Branch"

Page: Roles

Sub Heading *

Field Description *

Database Field Name * (no spaces)

Field Type
(Lookup Options format: "Option 1","Option 2","Option 3")

Field Size (in characters)

Required?

Default Value

You cannot edit the Field Type, Field Name and Field Size

Changing Lookup Options may affect existing records.

9.1.2 Positions

Company Info > Roles, Positions & Skills > Positions

If the **Department** field is changed while editing, the following notification will be shown:

"Changing the department of this position does not automatically update employee details. You will need to transfer all linked employees on this position into the new department."

Edit "Accounts Receivable"

Position Name:* Accounts Receivable

Reports To: Finance Manager

Department:* Administration

Screening Template: (not set)

Headcount/Staff: Salary Info

Hours Remaining: 0.00

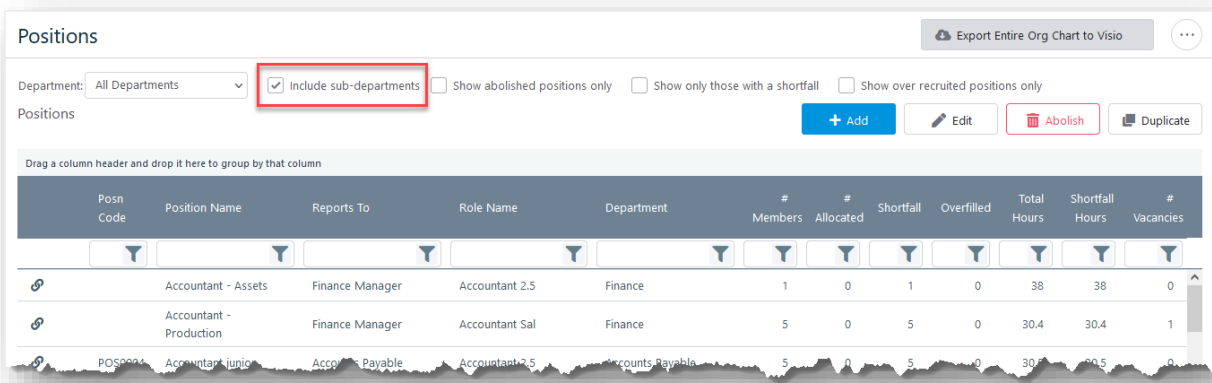
Save Delete

Users are now able to display positions that are in a specific company or department, including positions within sub-departments by adding the **Department** drop-down list and the **include sub-departments** checkbox. Selecting a department from the list will immediately show positions that are only in that department. Note that for users restricted to a department, the **Department** drop-down will default to that department, and the **All Departments** option will not be available.

It is now possible for an employee to report to another employee who has the same position name as positions are distinguished using a position code.

The **Add Position** and **Edit Position** screens will allow the position name to be the same as the position that it reports to. If the position is being edited, it will validate whether the position is reporting to itself and display an error message that reads "You cannot have a position reporting to itself, please change 'Reports To:'"

The **Include Sub-departments** checkbox has been moved from below the Department drop-down list to its right, as in the screen below to make it more intuitive.



9.1.3 Positional Chart

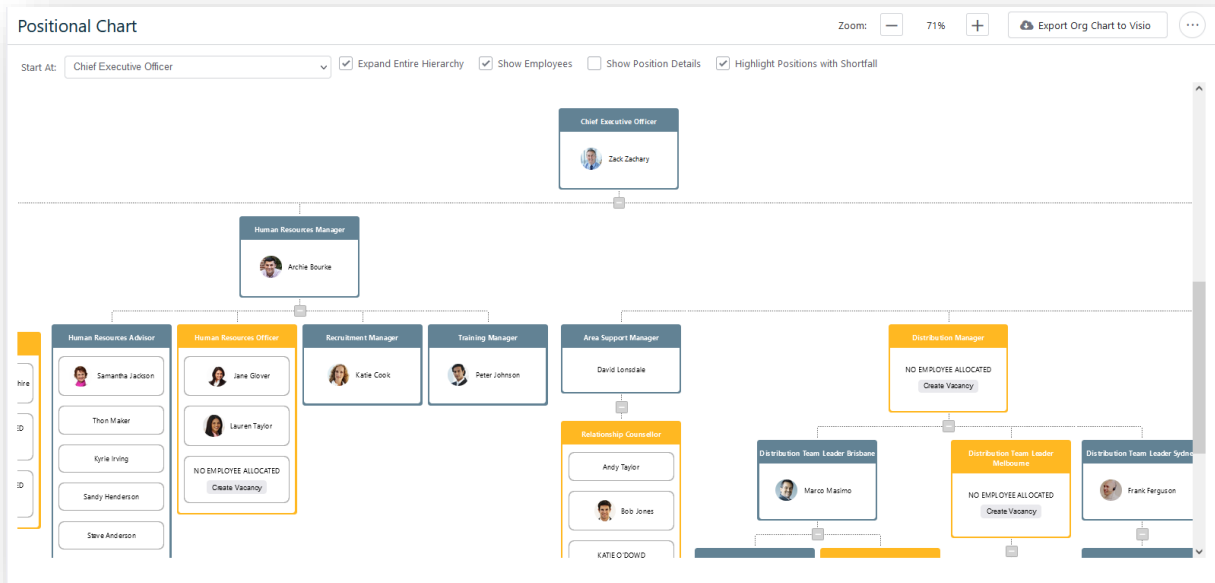
Company Info > Company Information > Org Chart by Position

The Positional Chart now includes Pan and Zoom Functionality among a host of other indicators that help users with access level Manager and above with making recruitment decisions.

The Zoom function allows users to zoom out to as much as 30% and Zoom in to as much as 1500%. The current scale is indicated between the **Zoom In** and **Zoom Out** buttons, and clicking on the scale will reset zoom to 100%. Additionally, Ctrl + mouse scroll will zoom in and out of the chart.

The Pan function allows users to click and drag to move the chart. Scrolling the mouse will pan the chart up and down at the current zoom level.

Users with access levels Recruiter, HR Administrator, and Administrator will see the option **Highlight positions with Shortfall**, which makes all positions in the chart with a shortfall display with a yellow header and border. These users will also see the option to **Highlight Positions with Vacancy**, which puts a clipboard icon to the left of the header for all positions which have an active vacancy.



9.1.4 Positional History

Company Info > Roles, Positions & Skills > Positional History

The **Employee Position History** screen has been updated so that an HR Administrator or above can see only employees who are active on the position history grid. It is now also possible to **Include Terminated Employees** in the grid and the drop-down list. The **Position Code** and **Role Grade** columns have been added to the grid, which has been redesigned so that it is more compatible with smaller displays.

9.1.5 Roles

Company Info > Roles, Positions & Skills > Roles

The role name and code are now visible in the title of the **Roles** page. Users can now see which tab they are currently in even when scrolling down as the title and tabs will be visible.

9.1.6 Skills

Skill descriptions have been added to several pages to allow users to distinguish which skill to add. The drop-down lists of the following pages have been updated to be Multi-column drop-down lists that include the skill and the skill description:

- Role Details – Skills tab – Skill field
- Applications – *Screening Tab > Skills* – Name field
- Vacancies – *Screening Tab > Skills* – Name field.
- Course Skills – Add a Skill to the selected Course – Skill field
- *My Details > Skills* – Add New Skill screen – Skill

Furthermore, skill descriptions will appear as tooltips for skill names in the grids on the following pages,

- Role Details – Skills tab
- Applications – *Screening Tab > Skills*
- Vacancies – *Screening Tab > Skills*

9.1.7 Issues Resolved

Company Info > Roles, Positions & Skills > Skill Level Sets

The **Skill Level Set Name** and **Skill Level** textboxes have been set a limit of 50 characters to be compatible with the system character limits.

Company Info > Roles, Positions & Skills > Positions

Resolved an issue where the **Edit** screen would not open fully when **Edit** is selected after selecting a row.

Fixed an issue that occurred when an employee had not been assigned to the department to which the position belongs. This caused the employee's assigned position to not display in their individual employment records.

Company Info > Roles, Positions & Skills > Positional History

An issue causing the **Allocated Salary** field to not be updated upon entering a new value has been fixed. Any changes made to employment details, position, and position history will be propagated throughout the system.

Company Info > Company Information > Org Chart by Position

Speed improvements have been made to the Positional Chart to reduce load and action times.

10.0 TIMECARDS AND AWARD INTERPRETATION

10.1.1 Assign Export Template

Admin > Timecards > Bulk Assignment > Assign Export Template

The Assign Export Template page has been redesigned to make it more user-friendly and intuitive. The changes include adding a **Show/Hide Filter** button at the top of the page, which allows users better visibility of the grid, especially in smaller resolutions. The **Assign or delete template for selected employees** section has been added before the grid for easier access. The grid itself has been replaced with an updated version, with the rightmost column including a **Delete** button that allows users to delete a template from the grid itself.

To bulk assign templates, select employees to assign templates using the checkboxes in the grid, select **Assign Templates** from the **Select Action** radio button group, select the **Template** and **Effective From** date and select **Assign Template**.

To delete templates in bulk, select the relevant employees from the grid, select **Delete Template** from the **Select Action** radio button group, and select **Delete Template**.

Assign Export Template to Employees 5 Current Users of 10000 Maximum Allowed Hide Filter ⋮

Filter on employees matching this criteria

Payroll DB: Meridian Department: (All Departments) Template: All Employees Apply Reset

Include Sub-departments

Employee: (not set) Employment Type: (not set)

Include Terminated

Assign or delete template for selected employees

Select Action: Assign Template Delete Template

Template: Exp All Trans - Do Not Process Autopay Assign Template

Effective From: 01/01/2016

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Employee	Payroll DB	Department	Template	Effective From	Effective To
<input type="checkbox"/>	Adam Gilchrist (AIR03421)	Meridian				
<input type="checkbox"/>	Amy O'Conner (S10)	Meridian	Projects			
<input type="checkbox"/>	AndrewS Watson (A32)	Meridian				
<input type="checkbox"/>	Andy Morris (V61REG6)	Meridian				
<input type="checkbox"/>	Andy Taylor (00151)	Meridian	Support Workers	Exp All Trans - Do Not Process Autopay	01/01/2016	
<input type="checkbox"/>	Ann Anderson (A334)	Meridian				

Refresh 🖨 📄

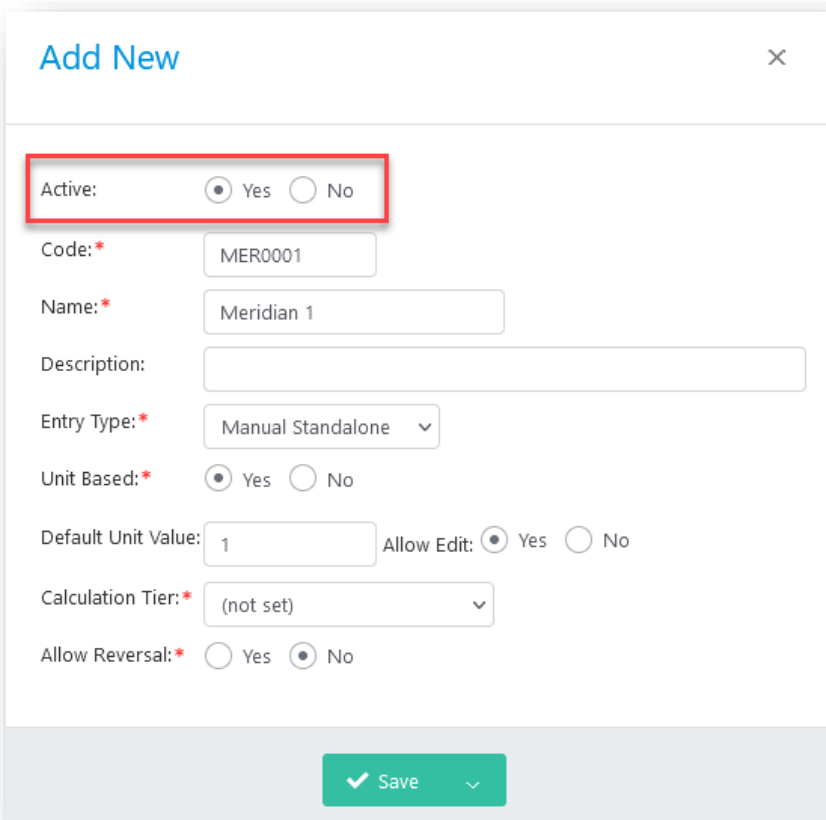
Page 1 of 2, items 1 to 100 of 120

10.1.1 Leave Reason Calculation

It is now possible to copy leave reason calculations from one leave rule set to one or more leave rule sets from the **Leave Reason Calculation** page. Select **Copy** and select the leave rule set to copy from and one or more rule sets to copy to and select **Save**. Furthermore, when you select **Add** in this page, a **Leave Reason** and its **Calculation Tier** can be added to one or more leave set rules by selecting them in the **Copy To** multi-select drop-down list.

10.1.2 Other Allowances

Other Allowance rules that are no longer in use can now be deactivated. Other Allowance rules can also now be created as not active, with the intention of activating it later.



Add New ×

Active: Yes No

Code:*

Name:*

Description:

Entry Type:* ▼

Unit Based:* Yes No

Default Unit Value: **Allow Edit:** Yes No

Calculation Tier:* ▼

Allow Reversal:* Yes No

Save ▼

The **Other Allowances** drop-down lists are also available in the **Add Other Allowance** Screens of **Timecard Period Entry**, **Bulk Transaction Entry**, and **Other Allowances** pages on ConnX Mobile. Inactive Other Allowance rules will not be shown in these pages.

10.1.3 Timecard System Settings

Admin > Timecards > General Settings > System Settings

It is now possible to view a log of Timecard-related events by selecting **View Log** on the **Timecard System Settings** screen. The **Timecard Log** screen has a filter that allows you to filter events by date. It is also possible to send individual log items by email to ConnX support from the leftmost column of the grid on this screen.

10.1.4 Issues Resolved

Special Days and Public Holidays are now distinguishable from each other in Timecards using the texts "(Special Day)" and "(Public Holiday)", respectively as suffixes.

Fixed a rare issue related to the Public Holiday Not Worked rule when trying to add an Other Allowance that returned an error.

Fixed an issue where RDOs were not showing in the Export page when an employee is attached to a timecard.

Timesheets > Timecards > Timecard Summary

The **Rule Set Group** filter in the **Timecard Summary** page will no longer show the rule set groups that are not active.

Fixed an issue where Timecard Summary permission settings were not being properly implemented, causing Supervisors to see rates information for which they had not been given permission.

Fixed an issue where selecting a value from a drop-down list collapses the filters, making it necessary to select **More Filters** each time a value was selected.

Timesheets > Timecards > Timecard Entry

Corrected an issue where negative Manual Entitlement values caused the value shown in the header label to be incorrect.

The Timecard styling for non-working days including Public Holidays now do not apply to leave in the states **Pending**, **Approved**, or **Completed**, especially when a multi-day leave application spans non-working days.

11.0 TIMESHEETS

11.1.1 Issues Resolved

Timesheet Entry

SSO users can now access the Timesheet Entry page via a shortcut by automatically logging in to ConnX using SSO.

Timesheet Copy

All timesheet data, including hours worked, will now be copied when copying a Timesheet.

12.0 WEB SERVICE

No substantial changes have been made.

13.0 WHS

13.1.1 WHS Incidents

WHS > WHS > Incidents

The **Recently Reported Incidents** tab has been made optional and can be set to be shown or hidden in *WHS > Administration > Setup*. This setting is set to show on upgrade.

The screenshot shows the 'WHS Initial Setup' interface. It includes a 'Save' button in the top right corner. The main content area is titled 'Initial set up of WHS' and contains several configuration steps:

- Step 2a:** 'Show Lessons Learnt?' with a dropdown menu set to 'Yes, I want to use WHS Lessons Learnt'.
- Step 2b:** 'Show Report New Incident?' with a dropdown menu set to 'Yes, I want employees to be able to report WHS Incidents'. Below this are three checked checkboxes:
 - Allow Employees to report Incidents
 - Allow Supervisors to report Incidents
 - Allow Managers to report Incidents
- Step 2c:** 'Setup your Incident Type Distribution Lists'. This section includes a dropdown for 'Select a Hazardous Area distribution list' and a checked checkbox for 'Include Reporting Employees Details'.

The checkbox for 'Show recently reported incidents (for last 4 weeks)' is highlighted with a red box in the original image.

The two columns **Occurred On** and **Reported Date** have been added to the **Unprocessed Incidents** tab in the **WHS Incidents** screen (*WHS > WHS > Incidents*).

13.1.1 Additional Fields

To accommodate larger set sizes, the character limit of the **Lookup Options** field in **Additional Fields** has been increased from 1000 characters to maximum.

13.1.2 Issues Resolved

WHS > WHS > Incidents

User are now able to save WHS incidents where the **Occurred on Time** value was midnight.

The current date and time values will be used for the **Occurred on Date** and **Occurred on Time** values rather than using past dates and times.

The WHS Incident Checklist now allows only one of **N/A** or **Completed** options (or neither) to be selected.

An issue was identified where when the person responsible was reassigned for a corrective action (from *WHS > WHS > Incidents* – Select Incident and select **Corrective Actions** tab), the workflow inbox item for the new assignee shows the name of the previous person responsible in the **For** column. This has been corrected so that the new assignee name will be displayed.

The issue where the task is not triggered when changing or reassigning the person responsible for corrective actions if the incident record is created from processing a reported incident is now fixed.

WHS > WHS > Dashboard

Fixed an issue that caused WHS Officers restricted to a location which is currently not in use seeing full-page error when trying to access the **WHS Dashboard**. Users can now see the dashboard indicating incidents related to the location, although the location itself is no longer in use and is not available in filters.

WHS > Administration > Locations

Users are no longer allowed to delete WHS Locations that are in use elsewhere in ConnX.

14.0 WORKFLOW FORMS

14.1.1 Request Employee Changes

My Team > Workflow Forms > Request Employee Changes

Several values in the **Request Employee Changes** screen were too lengthy for the drop-down lists, which are a fixed width and (mostly) disabled. This caused a problem where values could not be seen properly and in full. To improve visibility, the values in these fields will be shown in full in tooltips.

14.1.2 Request to Recruit

My Team > Workflow Forms > Request to Recruit

The **Cost Account** drop-down list in **Request to Recruit** has been re-ordered so that it is grouped by payroll database/company in alphabetical order, then ordered by Cost Account and then by Cost Account Description.

14.1.3 Issues Resolved

My Team > Workflow Forms > Request to Recruit

Users will no longer see the submission popup when trying to submit a **Request to Recruit** workflow form without filling in the mandatory fields.

Users will now be able to delete draft records by selecting **Delete** on the grid.

Request to Create Employee Record

Fixed an issue on the **Request to Create Employee Record** workflow form that caused the page to break due to an error with a user-defined field.

Custom Workflow Forms

A Custom Workflow Form will now be deselected by default and selecting **Complete Selected Items** will not have to force a user to check if they wish to complete the selected items. Selecting **Complete Selected Items** will process all selected requests immediately.

All User-Defined Fields in custom Workflow Forms are now visible on the Page Security page as this allows the appropriate security settings to be set for User-Defined Fields.

15.0 WORKFORCE PLANNING

15.1.1 Performance Development Plan

When adding skills to a **Personal Development Plan** using Gap Analysis, the skill's description will be used as the item description to improve clarity and understanding of the skill.

16.0 PAYROLL INTEGRATION

16.1 Access MicrOpay

Fixed an issue that caused employee terminations to be reflected in E-HR in MicrOpay even though Employee Terminations had not been set to be integrated with payroll.

16.2 HR3pay

No significant changes have been made.

16.3 All Other Payroll Interfaces

No significant changes have been made.

APPENDIX A - VACCINATIONS

A1 ACCESSING THE VACCINATIONS PAGE

There are three different ways to get access to the **Vaccinations** page:

1. An employee can add details for themselves via the **My Details** menu.
2. HR/Payroll Administrators and Administrators can add them by going to *HR Admin > HR > Maintain Employees*, selecting the employee from the drop-down menu and selecting **Vaccinations** under **Personal Information**.
3. Managers/Supervisors/Administrators can add them via *My Team > List Employees - Personal*.

Type	Dose	Status	Date Given	Effective until/Expiry Date	Booster/Catch up Due Date	Brand	Issuing Body	Attachment	Workflow Status
COVID-19	Dose 1	Current	01/05/2021		17/12/2021	Pfizer	Queensland Health		Approved
Tetanus		Current	03/11/2021	03/11/2026					Approved

A2 SETTING UP VACCINATIONS LIST TYPES

Before any user can add a vaccination, the following records must be configured in ConnX so that the information is available on the drop-down lists.

- Vaccination Type (mandatory)
- Vaccination Brand (optional)
- Vaccination Dose (optional)
- Issuing Body (optional)

You can also add user-defined fields to the vaccination record via *Admin > Setup > Settings > User Defined Fields*.

A2.1 Adding a Vaccination Type, Vaccination Brand, or Vaccination Dose

To add items to the drop-down lists on the Vaccinations page:

1. Log on as a user with HR Admin access or more.
2. Go to *HR Admin > HR Admin Setup > List Items*.
3. Select **Vaccination Type**, **Vaccination Brand**, or **Vaccination Dose** from the **List Type** drop-down list at the top of the screen.
4. Select **Add**. ConnX shows the following screen.

5. Complete each of the fields on the screen. A description of each field is shown in the following table.
6. Select **Save**.

Setting	Description
List Type	The List Types for Vaccination details are Vaccination Type , Vaccination Brand , and Vaccination Dose .
Code	The reference code for the List Type item.

Setting	Description
Display Text	The text that is shown for the List Type item. This field is mandatory.
Active From	The first date that the List Type item is available via the Vaccinations page. This field is mandatory for all List Items.
Active To	The last date that the List Type item is available via the Vaccinations page.



There are three Vaccination Status records that are always available in ConnX and cannot be modified or deleted:

NOTE

1. Current
2. Expired
3. Cancelled

A2.2 Editing a Vaccination Type, Vaccination Brand, or Vaccination Dose

To make changes to a **Vaccination Type**, **Vaccination Brand**, or **Vaccination Dose**:

1. Select Vaccination Type, Vaccination Brand, or Vaccination Dose from the List Type dropdown list
2. Select the row you want to make changes to and select **Edit** (alternately you can double-click on the row you want to edit).
3. Make any necessary changes.
4. Select **Save**.

A2.3 Deleting a Vaccination Type, Vaccination Brand, or Vaccination Dose

You cannot delete a **Vaccination Type**, **Vaccination Brand**, or **Vaccination Dose**.

When a **Vaccination Type**, **Vaccination Brand**, or **Vaccination Dose** is no longer required, you can key a date into the **Active To** field. The item will not be available on the drop-down list from the set date.

A3 CONTROLLING ACCESS TO VACCINATION INFORMATION

A3.1 Display Settings

Vaccinations must first be turned on in ConnX.

To do this, go to *Admin > Setup > Settings > Display*, and select the **My Details** tab.

Set the **Vaccinations** setting to **Show** so that the **Vaccinations** link is made available on the **My Details** menu.

A3.2 Page Security

Users are granted permission to view or edit details on the Vaccinations page according to their access level.

To set the page security for the **Vaccinations** page:

1. Go to *Admin > Setup > Settings > Page Security* and select **My Details – Vaccinations** on the **Page** drop-down list.

The screenshot shows the 'Page Security' configuration page for 'My Details - Vaccinations'. It features a table with columns for different user roles and their permissions (Visible and Editable) for various controls. The 'Control' column lists items like Type, Dose, Status, Date Given, Effective until/Expiry Date, Booster/Catch up Due Date, Brand, Comments, Issuing Body, Workflow Status, and five Attach Documents. The roles are Employee, Supervisor, Manager, and HR Admin, each with Visible and Editable sub-columns. Checkmarks indicate granted permissions, while empty boxes indicate denied permissions. Double arrows (») are present in the top row of the table.

Control	Employee Visible	Employee Editable	Supervisor Visible	Supervisor Editable	Manager Visible	Manager Editable	HR Admin Visible	HR Admin Editable	Admin Visible	Admin Editable
Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dose	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date Given	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Effective until/Expiry Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Booster/Catch up Due Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issuing Body	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workflow Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach Documents 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach Documents 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach Documents 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach Documents 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attach Documents 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. For each **Access Level** select the **Visible** checkbox for a specific element to show that information when a user with the selected access level opens the Vaccinations page.
3. For each **Access Level** select the **Editable** checkbox for a specific element to allow users with the selected Access Level to make changes to it.
4. Select **Update** to update the permissions.

**NOTE**

Page Security is applied to all ConnX users as if they were an Employee. When the Access Level setting is set to Admin, it is only applicable to Administrators that are changing information for an Employee.

A3.3 Permission Settings

The Permission Settings can control whether Administrators, HR Administrators, Managers, and/or Supervisors can get access to or edit information for one of their employees on the **Vaccinations** page, and whether to show vaccination information to users with the same access level or above.

For Supervisor and Manager permissions, go to *Admin > Setup > Settings > Permission*, scroll down to **Supervisor and Manager Permissions - Personal Information**.

For Administrator and HR Administrator permissions, go to *Admin > Setup > Settings > Permission*, scroll down to **Admin Permissions**.

A3.4 Workflow Actions

When a user adds vaccination information to ConnX, workflow approvals can be activated. Changes can be made to the default Workflow Action for Employee Vaccinations (ID 108) on the **Workflow Actions** page, available via *Admin > Setup > General > Workflow Actions*.

A4 ADDING A VACCINATION RECORD

Vaccination records can be added to an employee in ConnX in two ways:

1. An employee can add a vaccination record for themselves via the **My Details** menu.
2. A user with a Supervisor/Manager/HR Admin/Admin access level can add vaccination records via the **My Team** menu.

A4.1 Adding a Vaccination Record as an Employee

1. Go to *My Details > Personal Information > Vaccinations*.
2. Select **Add** in the top menu. ConnX shows the following screen.

The screenshot shows a form titled "Add New Vaccination" with a close button (X) in the top right corner. The form contains the following fields and sections:

- Type:** A dropdown menu with "(not set)" selected.
- Dose:** A dropdown menu with "(not set)" selected.
- Status:** A dropdown menu with "(not set)" selected.
- Date Given:** A date input field with a calendar icon.
- Effective until / Expiry Date:** A date input field with a calendar icon.
- Booster/Catch up Due Date:** A date input field with a calendar icon.
- Brand:** A dropdown menu with "(not set)" selected.
- Comments:** A large text area for entering notes.
- Issuing Body:** A dropdown menu with "(not set)" selected.
- Workflow Status:** A label with no input field.
- Attachments:** A section with a "Select" button and a dashed box containing the text: "Drop files here. Remaining Files: 5. Maximum File Size: 100MB".

At the bottom of the form is a green "Save" button with a checkmark icon.

3. Complete each of the fields with details about the vaccination. A description of each field is shown in the following table.
4. Select **Save**.

Setting	Description
Type	The type of vaccination (e.g., Influenza, COVID-19). An HR Administrator can create and maintain options for this field via <i>HR Admin > HR Admin Setup > List Items</i> .
Dose	The dose of the vaccine administered (e.g., Dose 1, Booster). An HR Administrator can create and maintain options for this field via <i>HR Admin > HR Admin Setup > List Items</i> .
Status	ConnX includes Current, Expired, Cancelled .
Date Given	The date that the vaccination was administered to the holder.
Effective Until/Expiry Date	The date until which the vaccination is considered valid.
Booster/Catch up Due Date	The date on which the booster or catch up for the vaccination is to be administered.
Brand	The brand of the vaccination administered. An HR Administrator can create and maintain options for this field via <i>HR Admin > HR Admin Setup > List Items</i> .
Comments	Any comments related to the vaccination.
Issuing Body	Select the issuing body for the vaccination on the drop-down list. The available issuing bodies are determined by an HR Administrator.
Workflow Status	The status of the workflow action (e.g., Pending, Approved, etc.)
Attachments	Up to 5 files can be attached related to a vaccination, with a maximum file size of 100MB.

**NOTE**

Administrators have the option to make Attachments and User Defined Fields available by selecting the desired Access Level and the related checkboxes on *Admin > Setup > Settings > Page Security*.

Any User Defined Fields for Vaccinations must first be configured via *Admin > Setup > Settings > User Defined Fields*.

A4.2 Adding a Vaccination Record as a Manager

The process for adding a vaccination for another employee is essentially the same, but you must get access to the Vaccinations page via the *My Team > My Team > List Employees* page.

1. Go to *My Team > My Team > List Employees* and select an employee
2. Open the **Personal** menu and select **Vaccinations**. ConnX shows the **Vaccinations** page for the selected employee.

Type	Dose	Status	Date Given	Effective until/Expiry Date	Booster/Catch up Due Date	Brand	Issuing Body	Attachment	Workflow Status
COVID-19	Dose 1	Current	02/11/2021		05/01/2022				Approved

3. Select **Add**.
4. In the **Add New Vaccination** screen, complete each of the fields with details about the Vaccination.
5. Select **Save** or use the drop-down to select another save option.

A5 EDITING A VACCINATION

To make changes to a vaccination:

1. Select the row with the vaccination you want to make changes to and select **Edit** in the top menu (alternately, you can double-click the row you want to edit).
2. Select **Edit** on top of the screen and make any necessary changes.
3. Select **Save** or select **Save & Close** to close the screen on save.



NOTE

If Vaccinations have been set up for workflow approval:

- (a) You cannot edit a vaccination if the current workflow status is Pending Approval.
- (b) Upon saving your edit, the approval process will trigger again.

A6 DELETING A VACCINATION

An Employee cannot delete a vaccination once added. A vaccination can be deleted by a Supervisor, Manager or Administrator, if they have been given the permission to do so by giving the appropriate permissions on the **Permission** screen (*Admin > Setup > Settings > Permission*).

To delete a vaccination:

1. Go to *My Team > My Team > List Employees* – Select Employee and select *Personal > Vaccinations*. This will open the **Vaccinations** screen for the employee.
2. Select the row with the vaccination that you want to delete.
3. Select **Delete**. ConnX shows a prompt, asking you to confirm that you want to delete the vaccination.
4. Select **Yes** to delete the vaccination. Alternatively, select **Delete** when editing the record.

A7 VACCINATION REMINDER NOTIFICATIONS

ConnX can be configured to **Send Vaccination Effective Until/ Expiry Date Reminders** and **Send Vaccination Booster/Catch Up Reminders** multiple times. These notifications are sent to the Employee.

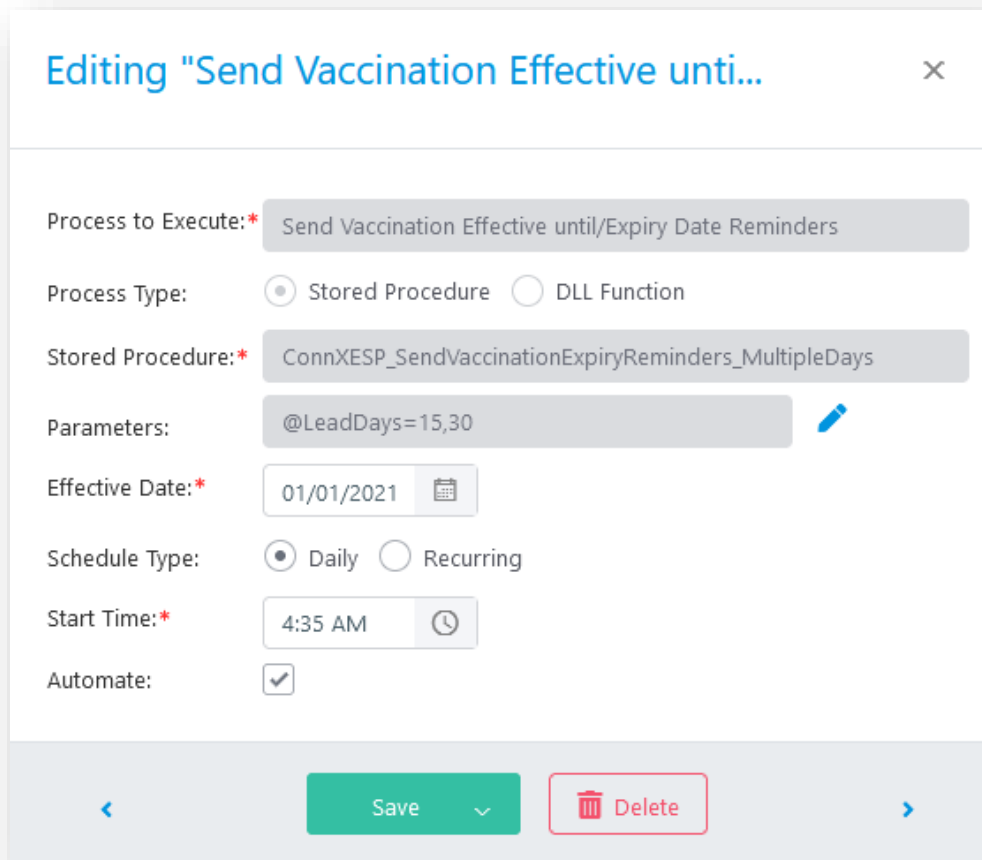
You have the option to make changes to the lead times (e.g., 15 days, 30 days, 60 days) of this process via the **Process Scheduler** page.

Go to *Admin > Setup > Settings > Automated Process Scheduler*.

The screenshot shows the 'Process Scheduler' interface with a table of tasks. The table has columns for 'Execute', 'Process to Execute', 'Stored Procedure/DLL Function', 'Type', 'Schedule', and 'Automated'. The task 'Send Vaccination Effective until/Expiry Date Reminders' is highlighted with a red box.

Execute	Process to Execute	Stored Procedure/DLL Function	Type	Schedule	Automated
	Delete Litmos Interface Log	ConnX_DeleteLitmosAPILog	Daily	4:30 AM	Y
	Send Employee Birthday Notification	ConnXESP_SendEmployeeBirthday	Daily	4:30 AM	N
	Send Vaccination Effective until/Expiry Date Reminders	ConnXESP_SendVaccinationExpiryF	Daily	4:35 AM	Y
	Send Vaccination Booster/Catch up Reminders	ConnXESP_SendVaccinationBooste	Daily	4:40 AM	Y
	Set Vaccinations status to expired	ConnXESP_SetVaccinationExpire	Daily	4:45 AM	Y

Double-click **Send Vaccination Effective Until/ Expiry Date Reminders** or **Send Vaccination Booster/Catch Up Reminders**. ConnX shows the following screen.



The screenshot shows a dialog box titled "Editing 'Send Vaccination Effective unti...". The dialog contains the following fields and options:

- Process to Execute:** Send Vaccination Effective until/Expiry Date Reminders
- Process Type:** Stored Procedure DLL Function
- Stored Procedure:** ConnXESP_SendVaccinationExpiryReminders_MultipleDays
- Parameters:** @LeadDays=15,30 (with an edit icon)
- Effective Date:** 01/01/2021 (with a calendar icon)
- Schedule Type:** Daily Recurring
- Start Time:** 4:35 AM (with a clock icon)
- Automate:**

At the bottom of the dialog, there are navigation arrows, a green "Save" button, and a red "Delete" button.

The Parameters field will contain the parameter **@LeadDays = x, y, ...**, where x, y, etc. are lead times in numbers of days. To change the lead times on which the reminders will be sent, select **Edit** next to the **Parameters** field. The following screen will be displayed:

Editing "Send Vaccination Effective until..."

Process to Execute:* Send Vaccination Effective until/Expiry Date Reminders

Process Type: Stored Procedure DLL Function

Stored Procedure:* ConnXESP_SendVaccinationExpiryReminders_MultipleDays

Parameters: @LeadDays=15,30

Effective Date:*

Schedule Type:

Start Time:*

Automate:

Send Reminder

15	days before		
30	days before		
60	days before	<input checked="" type="checkbox"/>	

Close

To add a lead time:

1. In the **Send Reminder** screen, enter the number of days (e.g., 60) into the enabled textbox and select **OK**.
2. Select **Close**.
3. Select **Save** or use the drop-down to select another save option

To edit a lead time:

1. Select **Edit** next to a saved lead time.
2. Select **OK**.
3. Select **Close**.
4. Select **Save** or use the drop-down to select another save option

To delete a lead time:

1. Select **Delete** next to a saved lead time
2. Select **Close**.
3. Select **Save** or use the drop-down to select another save option

A8 REPORTS

The Employee Vaccinations report (ID 41) has been created, which provides a list of current employees and their vaccination details