

**Staff Review and Development**  
**Release Note – Release 1.1.1**

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## 1. Release Overview

### 1.1 The Staff Review and Development (SRD) application and its background

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The purpose of the overall Staff Review and Development (SRD) Scheme is to enhance work effectiveness and facilitate career development.

It is a framework scheme, which means that institutions have the flexibility to provide their own guidance in line with the basic framework.

In order to support the scheme, the development of an online SRD support system was proposed. The project has three distinct phases:

- Stage One – Staff Review and Development administration;
- Stage Two – Completion of the review document; and
- Stage Three – Fully integrated recording of development needs.

The goals of the first release in September 2015 were to:

- Increase the efficiency of the administration of Staff Review and Development in the University; and
- Compliment (and run in parallel with) the programme of cultural change to fully embed Staff Review and Development within the University.

Release one therefore focused on:

- The accurate and efficient recording of probationary and SRD review information;
- Replacing the use of CHRIS for recording review outcomes; and
- The generation of reminders for review activities such as face-to-face meetings.

It provided the initial building blocks for the wider talent management objectives outlined in the above. Highlights of Release one included:

For Departmental Administrators:

- The ability to set-up review arrangements for their department;
- The ability to update arrangements when a reviewer or employee moves;
- The ability to assign additional people to the Head of Department or Departmental Administrator roles; and
- The ability to set-up links to local scheme guidance so that it can be displayed to employees with a particular job type within the department.

For Reviewers and Employees:

- The ability to record a review;
- The ability to upload and store documentation related to the review;
- The ability to record training requirements so that these can be reported by the department for planning purposes; and
- The ability for the reviewer and employee to sign off the review.

For Heads of Department/ Institution:

- The ability to see an accurate, up-to-date list of completed reviews;
- The ability to see the review details and documents for a completed review;
- The ability to dismiss a review record from the list once read; and
- Reporting on outstanding reviews and training requirements for the department.

Release 1.1.1 builds upon this functionality by addressing some of the issues raised in briefings and committees and by fixing some of the problems that were raised during initial use of the system.

You can logon to the SRD application using Raven at:

<http://hrsystems.admin.cam.ac.uk/srd-webapp>

Further information can be found on the HR Systems pages at:

<http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/staff-review-and-development-srd>

To find out more about this project, including details of forthcoming training sessions, you can also contact [Anna.Crichton@admin.cam.ac.uk](mailto:Anna.Crichton@admin.cam.ac.uk).

## 1.2 Summary of User Stories/ Fixed Issues/ Improvements

This list shows the user stories delivered in this release along with issues fixed and improvements implemented as a result of feedback.

Key	Summary	Priority	Type	Status
<a href="#">SRD-227</a>	Typo on Head of Department page	Minor	Bug	Closed
<a href="#">SRD-226</a>	Memory usage issues	Major	Bug	Closed
<a href="#">SRD-223</a>	Incorrect validation on selecting department	Major	Bug	Closed
<a href="#">SRD-222</a>	Wording change to employees	Trivial	Bug	Closed
<a href="#">SRD-221</a>	As a departmental admin it would be useful to see some high level statistics about reviews in my department so that I have an overview of what needs to be done.	Major	Story	Closed
<a href="#">SRD-220</a>	As a DA I want the system to show some text to warn me that an email will be sent to both employee and reviewer when an arrangement is set up so that I am not surprised when people start getting emails!	Major	Story	Closed
<a href="#">SRD-218</a>	Super user DA calendar doesn't go past 2015	Major	Bug	Closed
<a href="#">SRD-217</a>	As a report writer I would like to have access to the following fields: PARTY_ID on CHRIS_ORG_UNIT POSITION_ID on CHRIS_POSITION PERSON_ID on CHRIS_PEOPLE So that I can join CHRIS data reliably and quickly when creating reports for the SRD project	Major	Story	Closed
<a href="#">SRD-216</a>	On the HoD page, the overdue (i) doesn't always display (screenshot)	Major	Bug	Closed
<a href="#">SRD-214</a>	When setting up a review arrangement, if the employee is reviewed by someone else you get a message, "Currently reviewed by..." text. If the mouse is over this part of the text when you click it doesn't do anything	Minor	Bug	Closed

Key	Summary	Priority	Type	Status
<a href="#">SRD-213</a>	The filters in the Delegate Departmental Administrator page are not working properly	Major	Bug	Closed
<a href="#">SRD-212</a>	Review indexes and foreign key constraints in database	Major	Story	Closed
<a href="#">SRD-211</a>	As a reviewer or reviewee I don't want the next review due date to be written to my arrangement until both the reviewer and reviewee has signed off	Major	Story	Closed
<a href="#">SRD-209</a>	When adding or removing a delegate via Super users -> Delegate Departmental Admin the table doesn't auto update so you have to manually refresh to see the changes	Major	Bug	Closed
<a href="#">SRD-208</a>	When uploading a file from IE9 the filename contains the entire original path of the file	Major	Bug	Closed
<a href="#">SRD-198</a>	When picking the next review date (screenshot), if you leave the field blank and click OK it just returns you to the previous page (Cancel button function). This button should bring up the validation for the next review date and only work once this is filled	Minor	Bug	Closed
<a href="#">SRD-189</a>	Upload info (i) doesn't always display	Minor	Bug	Closed
<a href="#">SRD-188</a>	DA Completed Reviews search doesn't function well	Minor	Bug	Closed
<a href="#">SRD-187</a>	Incorrect sign off status in pop up display. This view shows the statement, 'Signed off on reviewer's behalf' with the CRSID, however this review was not signed off on their behalf, it was actually signed off by the reviewer	Major	Bug	Closed
<a href="#">SRD-177</a>	As a DA I would like to be able to see a list (and search within it) of leavers for the department	Major	Story	Closed
<a href="#">SRD-175</a>	Under the Head of Department Overview section, if the list is longer than the first page when you select the next page the list doesn't change	Major	Bug	Closed
<a href="#">SRD-173</a>	As the department lists are so long it would be nice if there was a super user search option as well to make it more usable when delegating departmental admins	Major	Story	Closed
<a href="#">SRD-172</a>	On the 'My reviews' page if you have multiple drop down lists of reviews if you open up a drop down and then click on 'View review' the page changes back to the default view rather than the	Trivial	Bug	Closed

Key	Summary	Priority	Type	Status
	previous state			
<a href="#">SRD-168</a>	Email template for completed review - Currently when the second person signs off the review (so that it's completed), the sign off email is sent to both parties which does not make sense as it contains the line: "Please log onto the Staff Review and Development system to sign off in order that this review round can be completed." A new template is needed for when the review is complete	Major	Story	Closed
<a href="#">SRD-167</a>	Email template for sign off from DA. When a DA signs off a review on behalf of the employee or reviewer it does not reflect this in the email. A new template is needed to say that the DA has signed this off	Major	Story	Closed
<a href="#">SRD-153</a>	Need the ability to add the HoD by name as well as CRSid	Major	Story	Closed
<a href="#">SRD-151</a>	Request for a departmental default for review frequency of 1 or 2 years. This will allow departments to have more rigorous review processes than the policy (which is two years). 1) DA will need to be able to set the default 2) This will then be used in calculations	Major	Story	Closed
<a href="#">SRD-148</a>	Add the ability to mark a training requirement as cancelled	Major	Story	Closed
<a href="#">SRD-147</a>	Add the ability to mark a training requirement as complete	Major	Story	Closed
<a href="#">SRD-141</a>	As a DA when I am transferring employers I want to be able to select from the list ... so that I can select a subset of employees to move to a new manager	Major	Story	Closed

### 1.3 Important Information regarding use of SRD Release 1.1.1

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Adoption of the new system is voluntary and the CHRIS screen for recording reviews will remain available for the foreseeable future.

Similarly the existing appraisal burst reports will continue to be generated.

The new SRD application also provides burst reports which you will start to receive at the start of the following month once your department has started to enter review data.

A couple of technical notes:

- When using this release for the first time, please ensure that you clear down the cache of your internet browser. If you have been involved in usability testing, some final changes have been made to the interfaces and you may need to clear the relevant items in cache for this to take proper effect. If you are unsure how to do this please contact your local IT support staff.
- The appendices to this document list the supported browser versions for the application. If you are running a supported browser, but this is in compatibility mode then the application may still work but will not always function correctly or predictably. If you are unsure how to check the mode and update it for your type of browser then please contact your local IT support staff.



## Appendix A – Known Issues/ Improvement Requests

### Known Reproducible Issues/ Improvements requested

The following issues and suggested new features are listed for assessment in any future releases:

Key	Summary	Type	Status
SRD-64	As a reviewer/reviewee I would like the recording of training outcomes to be integrated with the PPD system so that training requirements are easier to report on and the training itself is easier to organise	Story	Won't have (this time)
SRD-83	Make the application mobile friendly as employees may want to access the system via mobile phone	Story	Won't have (this time)
SRD-128	As an employee with multiple jobs in different departments, all the guidance links are displayed in one list. It would be nice if they could be split per department so I know which links relate to which department.	Improvement	Won't have (this time)
SRD-142	As a DA I need to be able to record a review to kick off the process for a manager or employee	Story	Won't have (this time)
SRD-152	Add a default next review date for departments. Some departments require all of their reviews to occur in the same month each year and a default next review date for the department would allow this: 1) DA to be able to enter the date and revise it each period 2) Data to be used in the next review date calculations	Story	Won't have (this time)
SRD-154	As a DA in a large department I want to be able to delegate DA ability to a sub group of employees within my department so that the delegate DA sees only the list of employee reviews for which they have responsibility	Story	Won't have (this time)
SRD-166	Mandatory fields for review record outcome	Improvement	Won't have (this time)
SRD-177	IE9 not displaying button text	Improvement	Won't have (this time)

Key	Summary	Type	Status
SRD-189	Upload info (i) doesn't always display	Improvement	Won't have (this time)
RP-1090	As a DA I would like probationary information to be fed back into CHRIS	Story	Won't have (this time)
RP-1125	As a DA I want to be able to override the next review date	Story	Won't have (this time)
RP-1127	As a DA I want the system to generate a letter to confirm the end of probation so that I do not need to key in the employee details into a word template	Story	Won't have (this time)
RP-1129	As a DA I want the uploaded documents to be unavailable to delegated DAs for viewing	Story	Won't have (this time)
RP-1131	Some departments require all of their reviews to occur in the same month each year and a default next review date for the department would allow this: 1) DA to be able to enter the date and revise it each period 2) Data to be used in next review date calculations	Story	Won't have (this time)
RP-1132	As a DA in a large department I want to be able to delegate DA ability to a sub group of employees within my department	Story	Won't have (this time)
RP-1133	As a DA I need to be able to record a review to kick off the process for a manager or employee	Story	Won't have (this time)
RP-1135	As an employee I wish that my training requirements displayed what job they relate to so that when I have multiple jobs I can easily distinguish what training goes with what job	Story	Won't have (this time)

## Appendix B – Browser Support

The following browsers are supported by the Staff Review and Development (SRD) application:

	Windows			MAC		
Application	Internet Explorer	Firefox	Chrome	Firefox	Chrome	Safari <sup>1</sup>
Staff Review and Development	V9+	V36+	V41+	V36+	V41+	7+

Note: that Front Motion Firefox is not supported although it is part of the standard installed desktop in some areas. If you are using Front Motion please contact your local IT support to arrange for an upgrade to a fully maintained version of the Firefox browser.

If you have any issues with the format or display of the application on these browsers then please contact your local IT support or you can contact the HR Systems Service Desk on [CHRIS.Helpdesk@admin.cam.ac.uk](mailto:CHRIS.Helpdesk@admin.cam.ac.uk) for advice.

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<sup>1</sup> Note that testing was performed on 8.0.5

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## Appendix C – Additional Support

### Support materials and briefings

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In order to support the release of The Staff Review and Development application a series of introductory demonstrations are being held throughout October and November 2015.

These can be booked online via the PPD system at: <http://www.training.cam.ac.uk/>

If you are unable to attend one of these sessions, or have any queries about using the SRD application, please contact the HR Systems Service Desk on [CHRIS.Helpdesk@admin.cam.ac.uk](mailto:CHRIS.Helpdesk@admin.cam.ac.uk)

Further information including getting started guides, FAQs and a copy of this release note can be found on the HR Systems pages at:

<http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/staff-review-and-development-srd>

There is also a video providing an overview of the new system.

### Loading review history

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If you wish to load your department's review history from either CHRIS or another local spreadsheet or database then a copy of the import format and mandatory fields can also be found on the HR Systems pages:

<http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/staff-review-and-development-srd>

Please contact the HR Systems Service Desk on [CHRIS.Helpdesk@admin.cam.ac.uk](mailto:CHRIS.Helpdesk@admin.cam.ac.uk) for more details.

### Loading email contacts

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The Staff Review and Development application relies on the reviewer and employee having valid email addresses to which notifications and reminders can be sent.

If you wish to bulk load email details for contacts in your department or institution please contact the HR Systems Service Desk on [CHRIS.Helpdesk@admin.cam.ac.uk](mailto:CHRIS.Helpdesk@admin.cam.ac.uk) and they will assist with this.