

**Staff Review and Development
Release Note – Release 1**

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1. Release Overview

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

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 are 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 focuses 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 will provide the initial building blocks for the wider talent management objectives outlined in the above.

To find out more about this project, including details of forthcoming training sessions, please contact Anna.Crichton@admin.cam.ac.uk.

1.2 Release 1 Contents

The purpose of this document is to outline the functionality delivered in the first release of the Staff Review and Development (SRD) application. Highlights of this release include:

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.

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>

1.3 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
SRD-1	As a manager/ employee/ department administrator I want the system to remind me when a probationary review or an SRD review is due so that I can make arrangements for the review meeting.	Must have	Story	Resolved
SRD-2	As a manager I want to record on the system probationary and SRD review outcomes with dates and approval information so that an employee's record is kept up to date	Must have	Story	Closed
SRD-4	As a manager/ employee/ department administrator I want to be able to initiate a review and optionally upload an initial assessment/self-assessment. It should be possible for employees with more than one job to have more than one review. Different departments and staff groups have different processes and sequences. Note that if documents are to be uploaded there are other types of document that the reviewee may be asked to supply.	Must have	Story	Closed
SRD-5	As a manager/ employee/ department administrator I want to be able to complete a review by filling out details online. Data recorded should encompass all of the fields currently recorded for appraisals within CHRIS.	Must have	Story	Closed
SRD-6	As a reviewer I want to be able to comment on a review by filling out details online (and possibly uploading documentation)	Must have	Story	Closed
SRD-7	As a manager/ employee/ reviewer department administrator I want to have links to guidance customised for my particular staff group/department at appropriate points in the process.	Must have	Story	Closed
SRD-9	As a Manager or Departmental Administrator I want to be able to nominate reviewers for a review. Departmental admins are defined in CHRIS	Must have	Story	Closed

Key	Summary	Priority	Type	Status
SRD-10	As the Head of an Institution I want to be able to see and approve completed reviews for my area.	Must have	Story	Closed
SRD-11	As a manager/ employee I want to be able to comment on and 'sign-off a review once I am happy with the content.	Must have	Story	Closed
SRD-12	As a Head of Department I would like to see a list of all reviews for my department with the ability to dismiss/acknowledge	Must have	Story	Closed
SRD-13	As an employee I want to be able to view and participate in my review activity from a single personalised page	Could have	Story	Closed
SRD-28	Modify existing job so that when review data is imported from CHRIS staff who have a review date due (and the reviewer) receive a reminder	Should have	Story	Closed
SRD-29	As a user I want the system to be able to handle position changes from CHRIS.	Must have	Story	Closed
SRD-30	As a user of any type I want to be able to login with Raven authentication. Individual records will remain confidential to the reviewee, their reviewer(s) and Head of Institution (or delegate)	Must have	Story	Closed
SRD-34	As the Department admin I need to be able to assign heads of department to departments	Must have	Story	Closed
SRD-37	Delegate access to maintain reviewers and reviewees to non-departmental administrators	Should have	Story	Closed
SRD-38	Configure integration test framework	Should have	Story	Closed
SRD-44	As a DA, I want to be able to see all reviewees that do not currently have a reviewer assigned to them so that I can easily assign reviewers and initiate the review process.	Should have	Story	Closed
SRD-45	As a DA I want to be able to record details of my department's scheme and links so that reviewers and reviewees know what is expected.	Must have	Story	Closed
SRD-46	As a HoD I want reviews to include proposed training details so that I can report on these and provide details to PPD and the careers pathways scheme	Could have	Story	Closed

Key	Summary	Priority	Type	Status
SRD-49	As a departmental administrator I would like to be able to assign a reviewer to a single reviewee.	Must have	Story	Closed
SRD-50	As a departmental administrator I want to be able to see and maintain all of the reviewees for a given reviewer, without having to view each reviewee individually.	Must have	Story	Closed
SRD-53	As an employee/Reviewer I want to be able to record training outcomes on a review record so that the HoD can report on these and plan for training schedules and budgets and so that I understand this element of my development plan for the future.	Could have	Story	Closed
SRD-63	As a reviewee/reviewer I would like to be able to upload documentation against a review so that I can attach relevant documents.	Should have	Story	Closed
SRD-65	As a departmental administrator of the system I want to be able to easily change the reviewer for a reviewee so that we can cater for reviewers leaving without breaking the review process	Should have	Story	Closed
SRD-67	As a departmental admin I would like to be able to specify the initial review date when pairing a reviewee with a reviewer.	Should have	Story	Closed
SRD-68	As a department admin I would like to receive an email periodically (frequency to be decided) to give me an overview of the number of people who need a reviewee attached and of Completed and overdue reviews so that I am prompted to log into the application and configure reviews and chase those that are overdue.	Could have	Story	Closed
SRD-69	As a reviewer or reviewee I would like the system to notify me when the other party involved in a review has signed it off so that I know that the review has either been completed or that I need to sign the review off to complete it.	Must have	Story	Closed
SRD-71	Handling of errors when users have no position set up	Must have	Story	Closed
SRD-72	As a super user I need to be able to emulate access so that I can trouble shoot user issues.	Must have	Story	Closed
SRD-74	Review date's don't align on different screens	Must have	Bug	Resolved

Key	Summary	Priority	Type	Status
SRD-78	DA Review Arrangements subtitle incorrect	Must have	Bug	Resolved
SRD-79	As a reviewer or reviewee I would like to receive an email when a new review arrangement is made so that I know that a review needs to be recorded in the future.	Must have	Story	Closed
SRD-81	Select a review - Currently the calendar pops up and masks everything on the screen	Must have	Improvement	Closed
SRD-82	Field is required on a review to distinguish whether it is a "Probationary" review or a "Staff Review and Development" review	Must have	Story	Closed
SRD-85	Merge "Home" and "My Reviews" pages. It is confusing to have them as separate pages as demonstrated in the demo!	Should have	Story	Closed
SRD-86	Remove the words "Signed off" from the signoff page when the review hasn't been signed off	Should have	Improvement	Closed
SRD-88	As any user, and as a web designer, I want all the help and guidance in the left-hand nav so that it is easy to find and uses otherwise unused space.	Should have	Story	Closed
SRD-90	As owner of the system I want it to handle changes in DA (which come from CHRIS) so that there's always some administrator who can manage review arrangements	Should have	Story	Closed
SRD-91	As a super user I can delegate departmental admin rights so that if the DA leaves or is away I can temporarily assign delegated DA rights for specific department(s).	Must have	Story	Closed
SRD-93	Change headings of all screens to 'Reviews'	Must have	Story	Closed
SRD-94	Tabs not appearing correctly - e.g. HOD tab is always present regardless of your situation	Must have	Story	Closed
SRD-95	Change all references to 'training outcomes' to 'training requirements'	Must have	Story	Closed
SRD-96	When adding the date of the review and saving, the next review date is calculated (currently +1 year). However after the review is signed off, this date is overwritten with the sign off date +1 year)	Must have	Bug	Resolved
SRD-98	As a reviewer I wish to see a list of the completed reviews for my reviewees.	Must have	Story	Closed

Key	Summary	Priority	Type	Status
SRD-99	As a reviewee / reviewer / HOD / DA; I wish to be able to view the details of completed reviews so I can see what documents were attached / training requirements etc. related to that review.	Must have	Story	Closed
SRD-100	As a super user I can manage the list of DA delegates that have been set up so I can view and remove any incorrect ones	Must have	Story	Closed
SRD-101	As a super user, when I type in a CRSid that does not exist the system does not add it but simply refreshes the screen and gives no feedback as to why the addition failed.	Should have	Bug	Resolved
SRD-102	As a super user - clicking on logout after emulation gives a 'something has gone wrong message'	Should have	Bug	Resolved
SRD-103	As a reviewer/ employee I need a drop down list of review types to be available when recording a review outcome so that I can say whether a review is SRD or probationary	Must have	Story	Closed
SRD-104	As a reviewer I need to be able to put in a next review date so that the system does not wait 2 years to send a review reminder when the review is probationary or the department has a scheme policy of reviewing more frequently	Must have	Story	Closed
SRD-106	As a Reviewer I want the system to look at the next review date on the latest review and send an email if it is within the reminder period	Must have	Story	Closed
SRD-107	As a reviewee I want to look at my review history	Could have	Story	Closed
SRD-109	As an employee/ reviewer I want to be able to upload documents against a review record	Should have	Story	Closed
SRD-111	As a DA I want to be able to record a review on behalf of staff who do not have online access	Should have	Improvement	Closed
SRD-112	Logout doesn't return to correct page - When clicking logout, you are presented with the 'Something has gone wrong' page	Should have	Bug	Resolved
SRD-113	Typos / grammar in system	Must have	Bug	Resolved
SRD-116	I can no longer delete a guidance link via the DA tab (Department Schemes)	Must have	Bug	Resolved

Key	Summary	Priority	Type	Status
SRD-117	Flag documents that are uploaded after sign off	Should have	Story	Closed
SRD-118	As a DA I want to be able to sign off a review on behalf of staff who do not have online access	Should have	Story	Closed
SRD-119	As HOD/DA/Reviewer I want to be able to see/ download all documents associated with a Review	Should have	Story	Closed
SRD-120	As a user I want to download a Review pack to include all documents and training for the review	Could have	Bug	Resolved
SRD-124	As a user I want a link to PPD from Training page	Could have	Improvement	Closed
SRD-125	As a reviewer I don't want to create new reviews for people that do not occupy positions	Should have	Story	Closed
SRD-126	As a DA with multiple departments, when you first go to the Departmental Admins tab you choose which department you want and then save. After doing this the department you choose does not show	Should have	Bug	Resolved
SRD-129	Improve search standardisation across screens	Should have	Improvement	Closed
SRD-130	List of DA's have some departments with no CRS ID & name	Must have	Bug	Resolved
SRD-131	It would be nice if on the DA delegate pages if it highlights those whose access has passed their end date. This was it can easily be seen so they can either be removed or new access granted	Could have	Improvement	Closed
SRD-133	Add text to training requirements screen to make it clear that recording requirements do not constitute bookings	Must have	Story	Closed
SRD-135	Reviews displayed in DA list not showing under reviewer	Must have	Bug	Resolved
SRD-137	As a DA when I set-up a review arrangement I want to be able to select any reviewer but have a choice of only reviewees in my department	Must have	Story	Closed
SRD-138	Change wording from reviewee to employee throughout the system	Must have	Story	Closed

Key	Summary	Priority	Type	Status
SRD-143	Next review day to be calculated using the previous due date rather than the date the review was actually held	Must have	Story	Closed
SRD-145	Add contact us details for Helpdesk	Must have	Story	Closed
SRD-146	Add link to HR Systems SRD page	Must have	Story	Closed
SRD-149	Add statement about security to document upload page	Must have	Story	Closed
SRD-150	When an employee is transferred to a new manager all reviews to stay with the old one (even if open)	Must have	Story	Closed
SRD-156	A number of issues were identified such as guidance links not wrapping on IE	Must have	Story	Closed
SRD-157	Change style of text around button as button looks odd if part of a sentence	Must have	Story	Closed
SRD-158	Make it clear in all email that the date is a 'Due date'	Must have	Story	Closed
SRD-160	Facility to add department review data from a spreadsheet as each department goes live	Could have	Story	Closed
SRD-161	Review order of dates on tabs - next review cannot be recalculated until any information has been entered for probation reviews	Must have	Bug	Resolved
SRD-165	Footer help link incorrect	Must have	Bug	Resolved
SRD-169	Add text to review sign off screen "Please note that once both parties have signed off the review, the Head of Department will be made aware that the review is complete."	Should have	Story	Closed
SRD-170	After choosing a reviewer, if I enter % when searching for the employee the search takes a long time to return all the people in the department.	Should have	Improvement	Closed
SRD-171	If logged in as a super user (cab211 in dev), I can only search for people within my chosen department (via the DA tab) on the Delegate department admin page (via Super users)	Must have	Bug	Resolved

Key	Summary	Priority	Type	Status
SRD-174	Sorting of 'My reviews' - It would be clearer if the current review was on top, will the historical ones sorted by date	Should have	Improvement	Closed
SRD-178	Additional text for sign off screen	Should have	Improvement	Closed
SRD-179	Change to text on training requirements screen	Should have	Improvement	Closed
SRD-176	IE9 not displaying buttons	Must have	Bug	Resolved
SRD-181	My reviews due date incorrect	Must have	Bug	Resolved
SRD-191	Random crashes	Must have	Bug	Resolved
SRD-192	Typos / grammar in system	Must have	Improvement	Closed
SRD-193	Default page always goes to 'Sorry - your session has expired'	Should have	Bug	Resolved
SRD-195	No error handling for PDF/A attempted conversion for pwd & encrypted files	Must have	Improvement	Closed
SRD-196	Review date > 24 months not allowed	Must have	Bug	Resolved
SRD-197	Default 24 month for SRD & 1 month for Probation review	Must have	Story	Closed
SRD-199	CRSID search finding users when it shouldn't	Should have	Bug	Resolved
SRD-200	Can't select department when have multiple DA roles	Must have	Bug	Resolved
SRD-202	Update the standard SRD guidance link	Must have	Story	Closed
SRD-203	Add text to Set up review arrangements screen	Should have	Story	Closed
SRD-204	Creating a link with the same address but different name causes crash	Must have	Bug	Resolved
SRD-207	On the "Show employees without a reviewer" page, the popup is not working when filtering was used		Bug	Resolved

1.4 Important Information regarding use of SRD Release 1

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

A1 - 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-141	As a DA when I am transferring employees 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	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-147	Add the ability to mark a training requirement as complete	Story	Won't have (this time)
SRD-148	Add the ability to mark a training requirement as cancelled	Story	Won't have (this time)
SRD-151	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	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 next review date calculations	Story	Won't have (this time)

Key	Summary	Type	Status
SRD-153	Need the ability to add the HoD by name as well as CRSid	Improvement	Won't have (this time)
SRD-154	As DA in a large department I want to be able to delegate DA ability to a sub group of employees within my dept 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-167	When a DA signs off a review on behalf of the employee or reviewer it does not reflect this in the email.	Improvement	Won't have (this time)
SRD-168	Currently when the second person signs off the review (so that it's completed), the sign off email is sent to both parties	Improvement	Won't have (this time)
SRD-172	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 previous state	Improvement	Won't have (this time)
SRD-173	Include a search feature in the department drop down list for Super users	Improvement	Won't have (this time)
SRD-175	Paging not working on HoD overview list, Completed reviews & Delegate DA (super user)	Improvement	Won't have (this time)
SRD-177	As a DA I would like to be able to see a list (and search within it) of leavers for the department	Improvement	Won't have (this time)
SRD-177	IE9 not displaying buttons	Improvement	Won't have (this time)
SRD-189	Upload info (i) doesn't always display	Improvement	Won't have (this time)
SRD-187	Incorrect sign off status in pop up display	Improvement	Won't have (this time)
SRD-188	DA Completed Reviews search doesn't function well	Improvement	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 ¹
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 for advice.

¹ Note that testing was performed on 8.0.5

Appendix C – Additional Support

Supporting materials and briefings

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

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

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 for more details.

Loading email contacts

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 and they will assist with this.

