it's about time

Workforce Management Release Notes

for Version 5.9.6

Supporting over 1500 organisations of all sizes and sectors for 50 years

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Workforce Management Release Notes for Version 5.9.6

Scheduled for Tuesday 29th April 2025

The update will start at 18:30 and could take up to 30 minutes.
During the update, the Workforce Management Manager's Administration screen and the Employee Self-Service screen will not be available.

The release notes have been sent to you as a designated administrator on the system. Administrators can opt out of receiving release notes by selecting 'Me' then 'Preferences'. on the Admin screen and unticking 'Receive Release Notes'.

New Features and Improvements

Enhanced Navigation

T&A, Flex & Access Control

This release brings a major upgrade to the navigation making it faster, more flexible, and easier to use.

Previously, Imperago featured a traditional top navigation bar. While familiar, it had its limitations, especially as the system has grown. To improve this, we've introduced two key enhancements:

1. **Search Functionality** – A new search bar has been added to the existing navigation, allowing you to quickly find menu items and employees without needing to browse manually.

2. **Optional Sidebar Navigation** – You can now switch from the top navigation bar to a new, highly customisable sidebar. This gives you greater control over how you navigate, with more layout and styling flexibility and the same integrated search experience.

These changes are designed to help you move around Imperago more efficiently, no matter how you prefer to work.

Classic Navigation

Although we've introduced a new sidebar navigation option, it is **not enabled by default**. To maintain familiarity and minimise disruption, the classic top navigation bar remains active when you first log in after the upgrade.

The only visible changes at this point are two new controls on the existing navigation bar:

1. A search icon, which opens the new quick search feature.

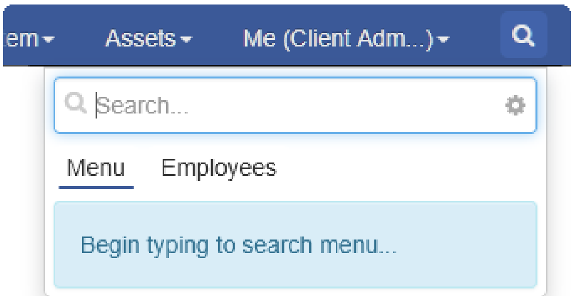
2. A "Try new mode" toggle, which lets you switch to the new sidebar layout when you are ready.

This allows you to explore the updated experience at your own pace, without forcing any immediate changes to how you work.

Using the Search Bar

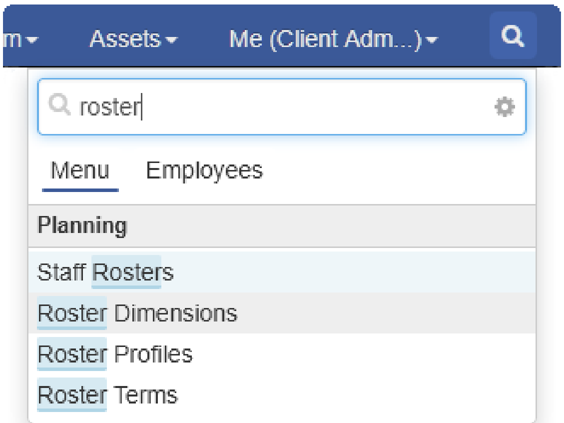
The new search bar helps you quickly find menu items or employees, depending on your permissions and licence.

To get started, click the "search icon" on the navigation bar. A dropdown will appear.



Searching the Menu

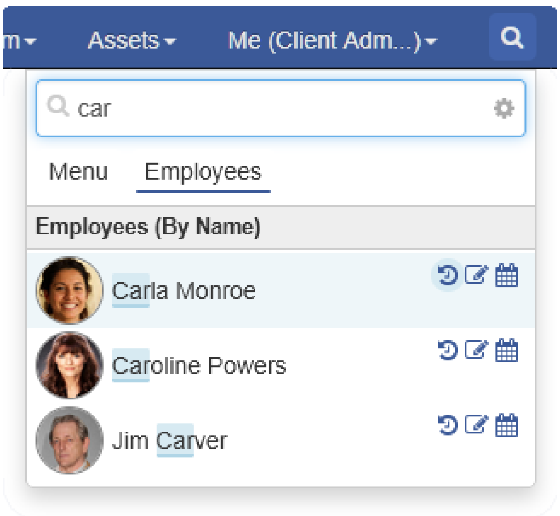
By default, the search is set to look through the menu. Simply start typing, and matching items will appear below. You can click any result to jump straight to that page.



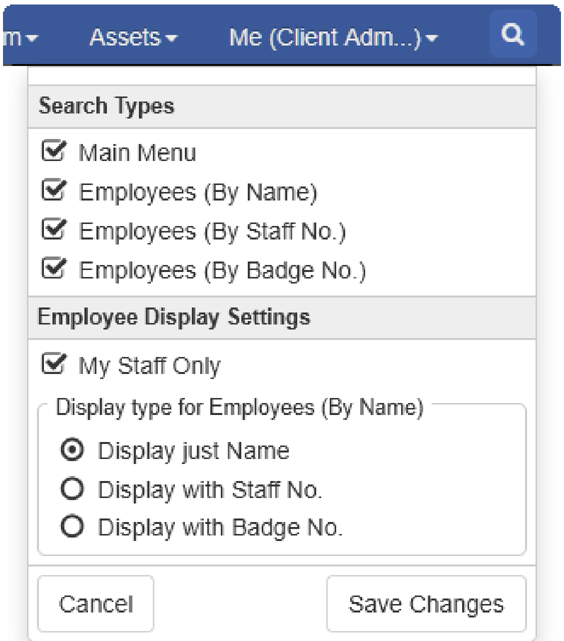
Searching for Employees

If you want to search for employees instead, click the tab to switch to employee search. As you type, matching employees will be listed.

Each employee result includes familiar actions such as "History", "Edit", and "Calendar" (the same icons you'd normally see on the employee list page). You can click an icon to go directly to that section or click anywhere on the employee block to open their default page.



Settings
You can customise how the search behaves by clicking the cog icon in the top-right corner of the search dropdown. This opens the search settings panel.



Within the settings, the “Search Types” checkboxes allow you to control what kinds of searches are available. For example, in addition to the standard employee search, you can also enable searches by “staff number” or “badge number”, depending on your preference.

These options give you more flexibility in how you locate information — especially useful if you're working with large teams or different identification methods.

When at least one employee search type is enabled, an additional section appears in the settings: Employee Display Settings. This allows you to control which employees are shown in the search results, and how they are displayed.

- **My Staff Only** – When this is checked, the search will only return employees you manage. Leave it unchecked to see all employees (subject to your login permissions).

- **Display Options** – By default, only the employee’s name is shown in the results. However, you can choose to display either the “Staff Number” or “Badge Number” instead. This is especially useful in cases where multiple employees share the same name, making them easier to identify at a glance.

These settings give you more control over the search experience, helping tailor it to your needs.

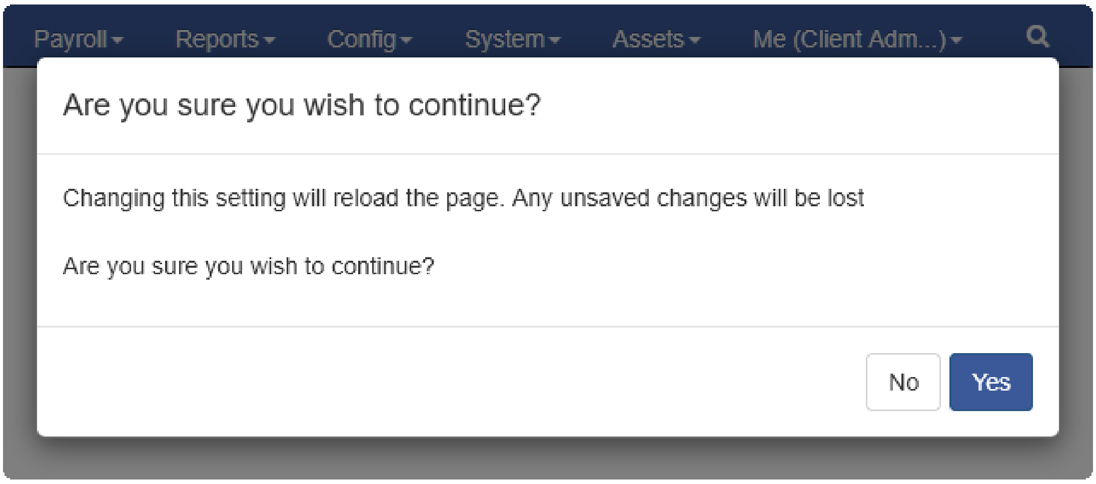
Once you are happy with the settings, pressing save will return you to the search menu.

Your Last Search Mode is Remembered
When you switch between “menu” and “employee” search, Imperago will remember your preference. So, the next time you open the search, it will default to the last mode you used.

Keyboard Shortcuts
You can use keyboard shortcuts to open and navigate the search quickly:

- Press **"?"** anywhere (except when typing in another input box) to open and focus the search bar.
- Use **TAB** to switch between the menu and employee tabs.
- Use the **↑/↓ arrow keys** to move through the results.
- Press **Enter** to select the currently highlighted item.
  (The first result is always selected by default, so you can hit Enter straight away if it's the one you need.)

"Try New Mode" Toggle
Clicking the **"Try New Mode"** toggle will switch you to the new sidebar navigation.
Before the change is applied, you'll see a prompt confirming that the page will reload.



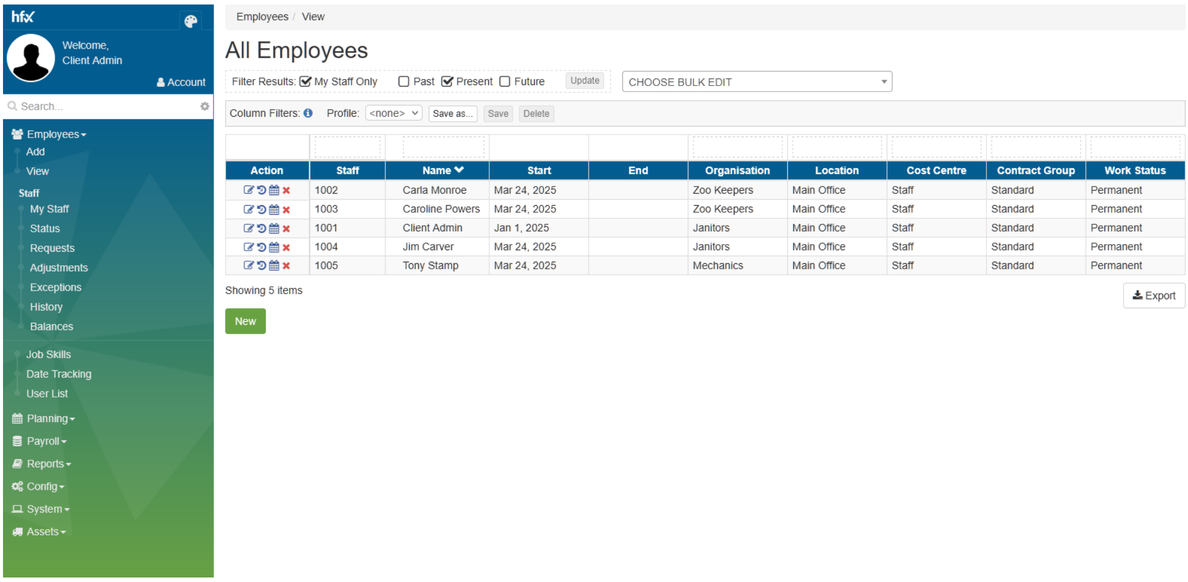
This is important to note, as **any unsaved changes will be lost** when switching modes. Once confirmed, the page will reload, and the new navigation layout will be enabled.

it's about time

New Sidebar

The new sidebar comes with a range of modes and themes that can be mixed and matched to suit your preferences.

When the page first reloads after enabling the new mode, you'll see the wide sidebar paired with the HFX theme by default. From there, you can explore different layout and style combinations to find what works best for you.



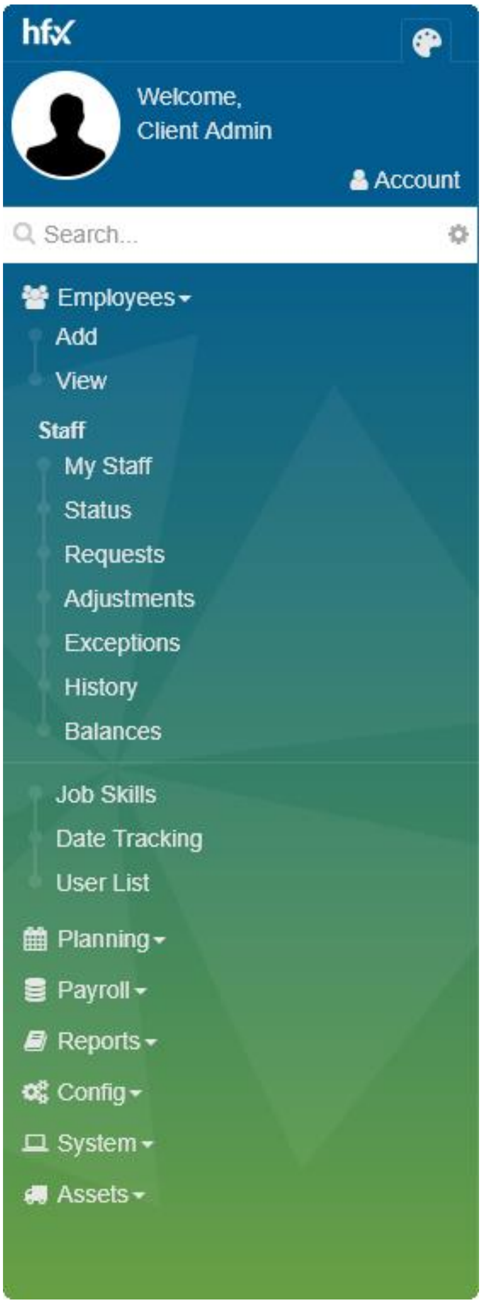
Sidebar Modes

There are three sidebar modes to choose from, each offering a different experience depending on how you like to work.

The three modes are, Wide, Narrow and Hover.

You can switch between modes at any time, depending on what suits you best. If you prefer things the way they were, you can always return to the classic top navigation.

Wide Mode



Wide Mode displays a full-height sidebar with all top-level menu headings visible. Sub-menus are hidden by default, but once you click to expand them, they'll stay open for future visits — making it easy to keep your most-used sections readily accessible.

The search bar is always visible at the top of the sidebar. When searching the menu, results will automatically filter the menu itself, allowing you to navigate directly without a separate dropdown.

If you switch to employee search, results will appear in the space below the search bar, temporarily replacing the menu content.

You can return to the dashboard at any time by clicking the HFX logo in the top-left corner of the page.

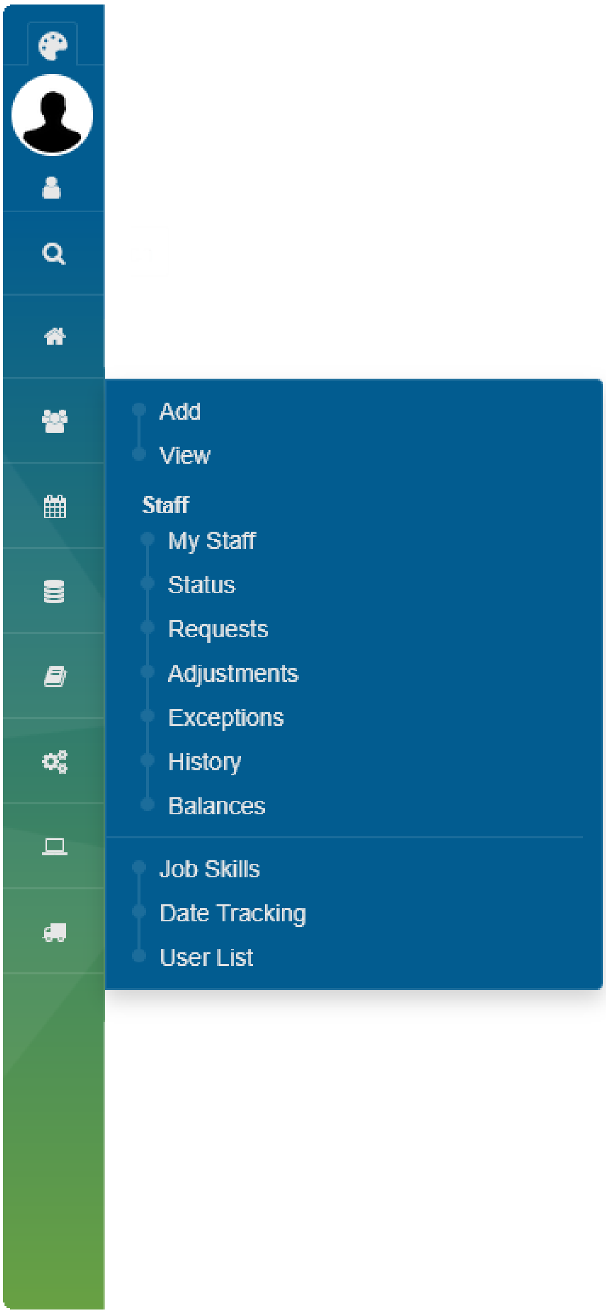
To change the sidebar's theme or mode, click the paint palette icon at the top of the sidebar.

Account

To log out, update your preferences, or change your password, click the "Account" link near the bottom.

it's about time

Narrow Mode

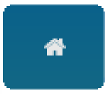


Narrow Mode offers a more compact sidebar that maximises space while still giving you access to all your menus. In this mode, only icons are shown by default.

Menus do not stay open between sessions; each time you return, they will start collapsed.

To open a menu, you must click the icon. Hovering over it will show you which menu it represents but will not expand it.

The search bar is not visible by default in Narrow Mode. To use it, click the search icon at the top of the sidebar.

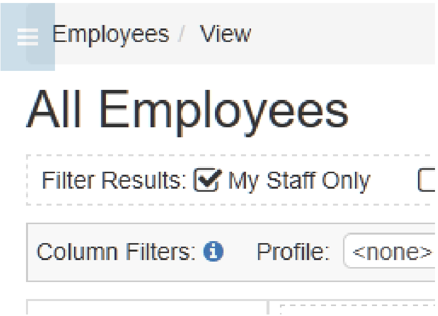


You can return to the dashboard by clicking the home icon at the top of the sidebar.

To log out, update your preferences, or change your password, click the user icon below your display picture.

To change the sidebar's theme or mode, click the paint palette icon at the top.

Hover Mode



Hover Mode keeps the sidebar completely hidden by default, giving you a clean, uncluttered workspace. To access the sidebar, simply hover over or click in the top-left corner of the screen, it will slide out temporarily, allowing you to navigate.

Aside from how it appears, Hover Mode functions the same as Wide Mode: top-level menus are visible, sub-menus can be expanded and are remembered, and the search bar behaves in the same way.

As with all modes, but especially helpful in this mode, the search shortcuts work as described for the classic navigation mode. As such pressing “?” will automatically open the sidebar.

Themes

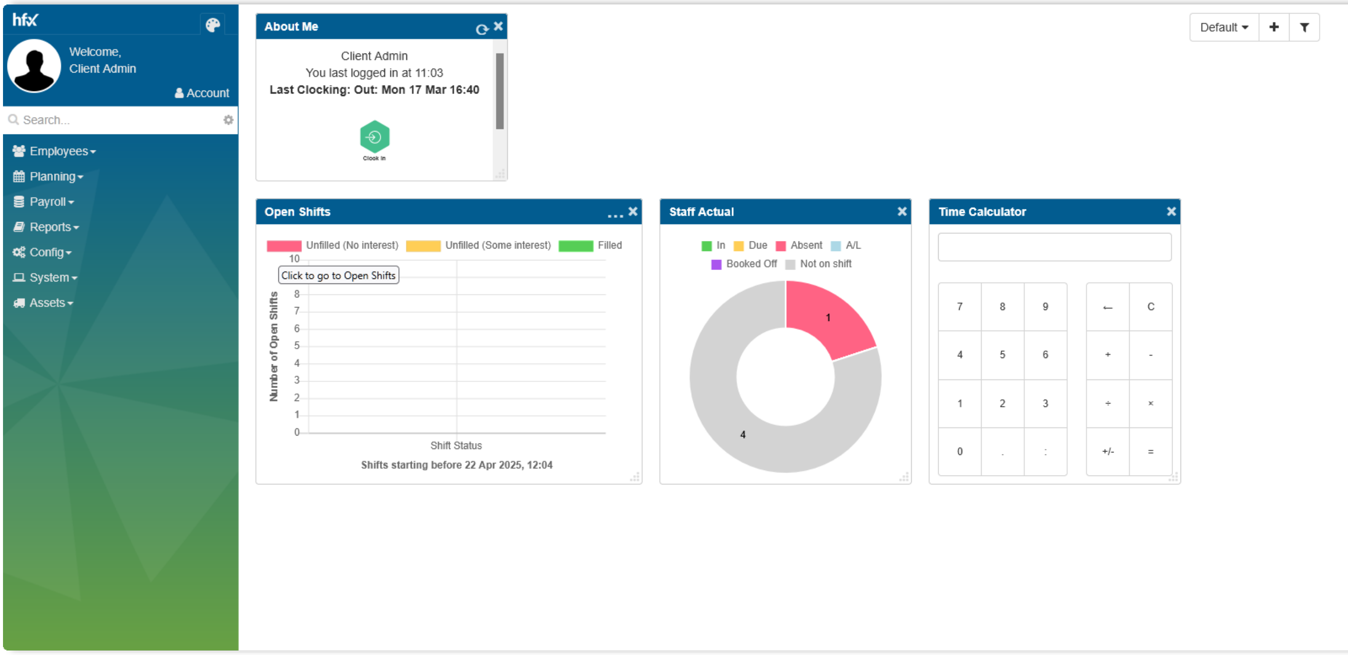
To help you personalise your workspace, the sidebar includes twelve different themes, each offering a unique colour scheme and style.

When combined with the three available modes (Wide, Narrow, and Hover), that gives you 36 different ways to customise the look and feel of your sidebar.

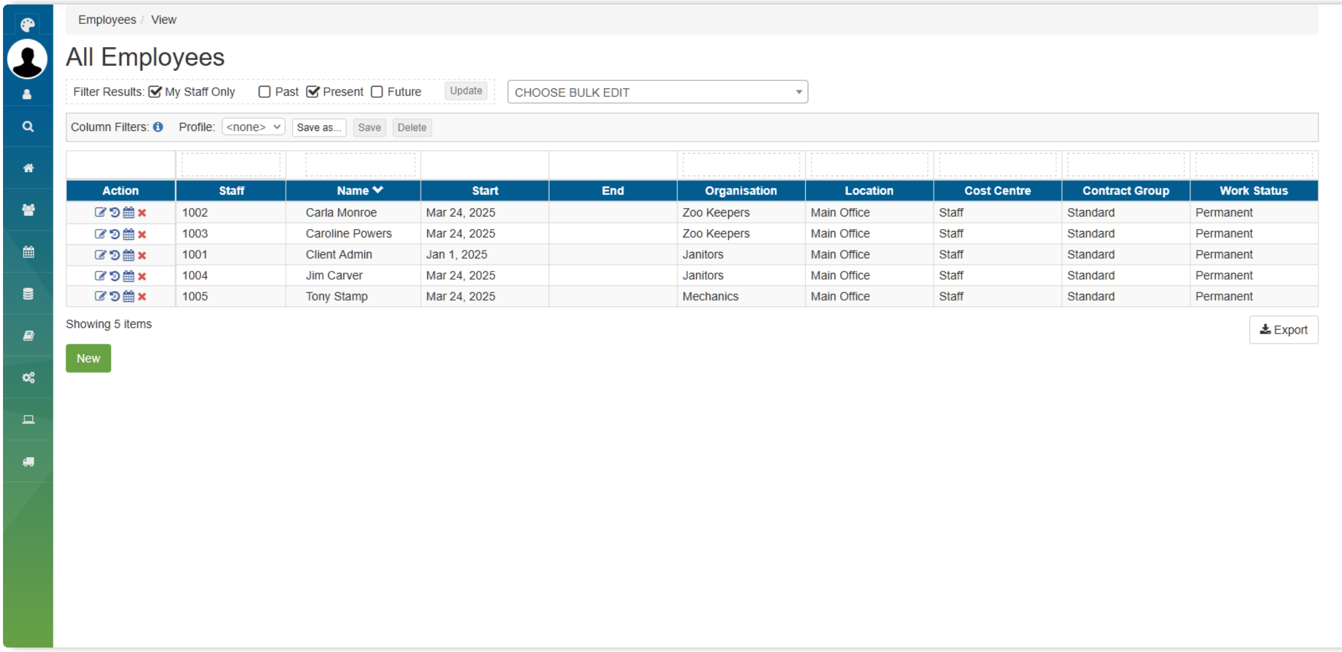
You can explore and apply themes by clicking the paint palette icon at the top of the sidebar. Theme changes are applied instantly, so you can quickly find a combination that works best for you.

The styles are HFX, Deep Blue, Sunset Purple, Forest Green, Crimson Red, Winter Wonderland, Spring Awakening, Summer Sands, Autumn Harvest, Slate, Neon Blue & Night Sky.

HFX Theme – Default



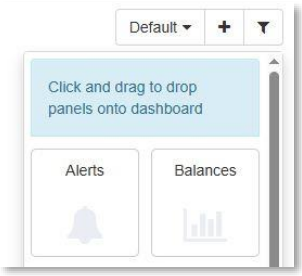
HFX Theme with Wide Sidebar



HFX Theme with Narrow Sidebar

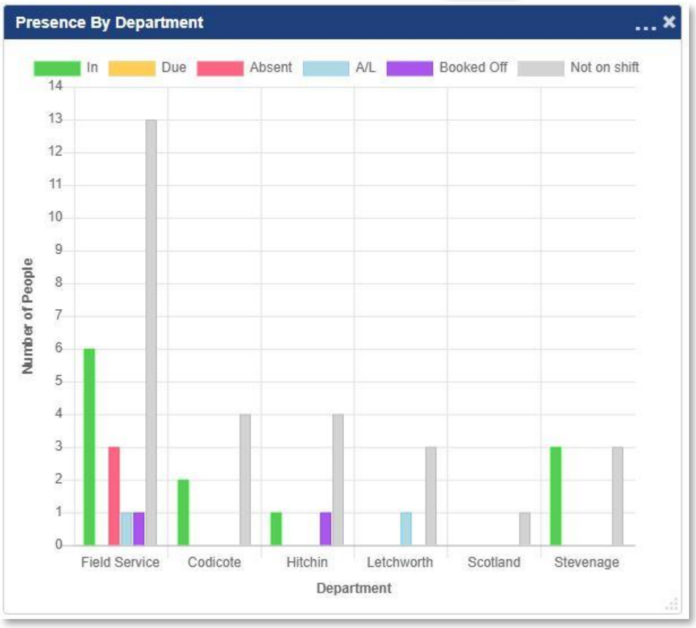
The new themes are not available for customers who have previously purchased a bespoke theme.

New Home Screen Panels



From the Home Screen there are three new panels, Presence by Department *T&A & Flex*, Open Shifts *T&A* and Balances *T&A*. These can be added to a dashboard by clicking on the + 'Add Panels' icon and dragging the icon of the required panel onto the dashboard.

Presence By Department panel



The new Presence By Department panel show groups of staff by multiple attributes in one chart. For example, the chart below shows the details for the organisational group Field Service and then split by 5 locations.

The selection of what to include in the chart is made using the filter icon next to the plus. The default is My Staff.

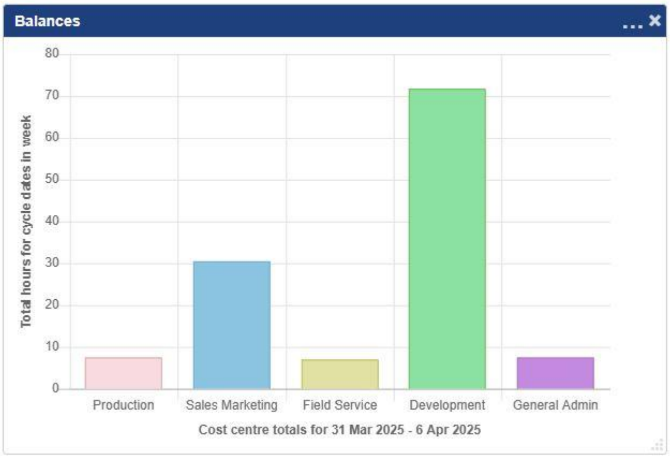
Attributes that can be selected are Organisation, Location, User Defined Group, Cost Centre & Payroll Group.

When making the selection for the chart if individual Actuals panels are also displayed, but not required, turn off the User Preference 'Home Page Actuals show each Group filter in its own Actuals Panel'

Open Shifts Panel

For customers using Open Shifts there is a new Open Shift panel which gives an overview of the status of future Open Shifts. The panel can be configured to show the number or percentage of Open Shifts, the number of days/hours ahead and the status. The three types of status are Unfilled (No Interest), Unfilled (Some Interest) and Filled. The new Open Shifts Chart filters can be set up to group the open shifts by. One example of filtering is "Location equal to Stevenage, Birmingham, Exeter" – to group by location and then the chart will only show shifts for the three locations. Another example is "Cost Centre equal to " to group by cost centre and show all the cost centres. Multiple charts can be set up filtering for different attributes or locations. Clicking on the chart drills down to the Open Shifts page to show details of Open Shifts.

Balances Panel



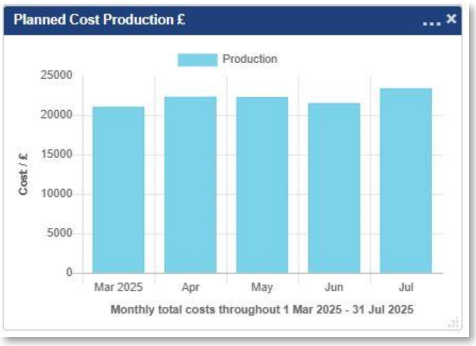
The new Balances panel has options to show group totals for Location, Cost Centre, Contract Group, Payroll Group or Job Role for a single day, a week or a month. The other option is to show top 10 assignments by their total for the period.
This can be today (or current week/current month) or offset back by any whole number of periods.
For example, interval=day, offset=3 means 3 days before today.
interval=week, offset=1 means last week.
Daily and cumulative balances can be supported using an optional cycle.
For example if a cumulative balance of Weekly Basic is chosen, which is reset on Saturday and then accumulates up to and including Friday (via a contract rule), a Friday date cycle should be used.
To add this panel the person will need to have permissions for Balances.

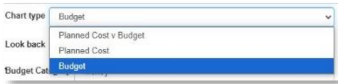
Other Changes to Panels

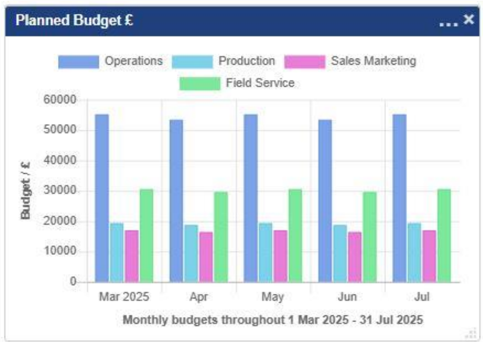
Costs vs Budgets Panel

T&A

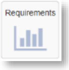
The Costs vs Budgets panel can now be configured to also display only costs or budgets by changing the chart type.



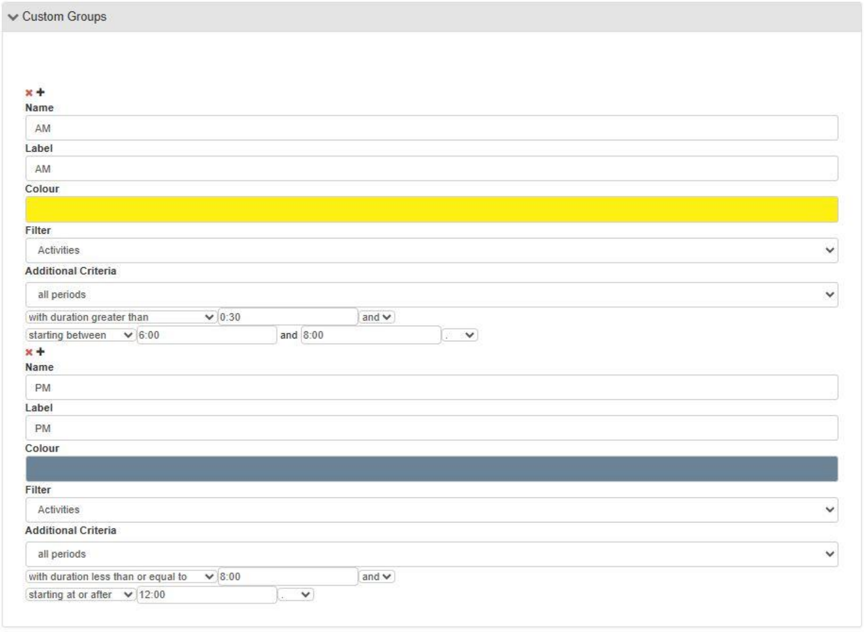


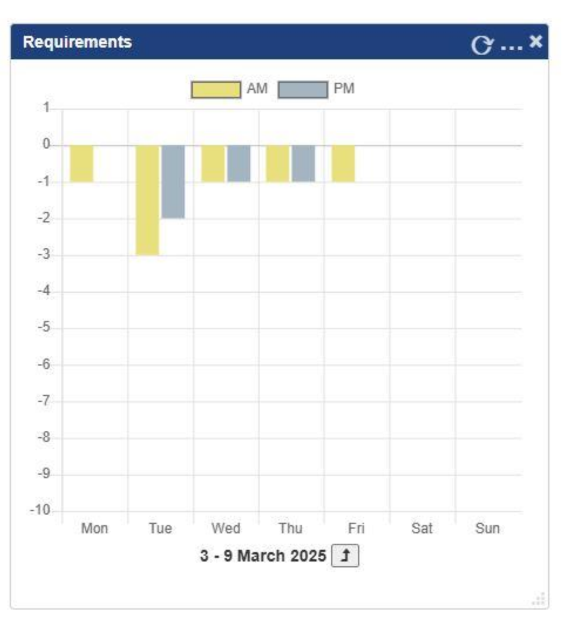


The Requirements Panel *T&A*



can now be used to group and compare identical requirements from different parts of the day to help plan for peak demand times. The new configuration can be selected in the Requirements Chart Definition (under the Planning menu tab), Custom Groups set up.





The example shows the configuration used to compare AM and PM requirement periods
The chart produced from this configuration displays that on Tuesday 4th March there were more unmatched AM requirements than PM.

When clicking on the chart in a Requirements Panel the Staff Roster screen is opened from the start date used for the chart.

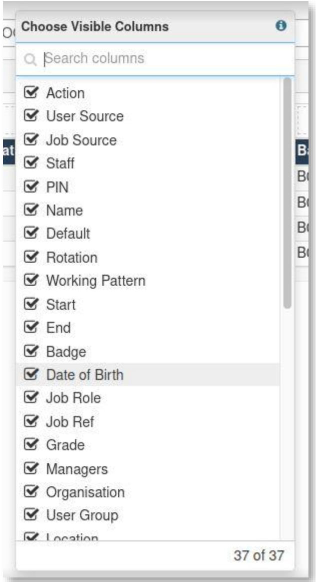
About Me - One Button Clocking

T&A & Flex

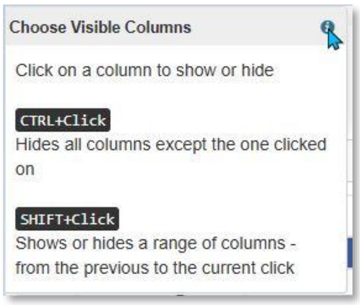
Managers/Administrators with permission to clock from the Self-Service site can now clock in the Admin site on a Clocking icon displayed in the About Me panel on the Home Page. The icon will be displayed for the appropriate direction dependant on the previous clocking. The clockings made on the Admin site will be displayed in the history screen as if they are Self-Service clockings. This feature is not available for customers using Clocking Attributes or Geo-Location.

Resizing Home screen panels horizontally and vertically can be done by dragging the right or bottom edge of the panel. The panels can still also be resized by dragging the bottom right corner.

The Column Chooser for grids, (right click to view), has a search facility added when there are more than 15 columns to select from. The bottom right corner shows the count of visible columns.



A new information tip displays how to change multiple columns.



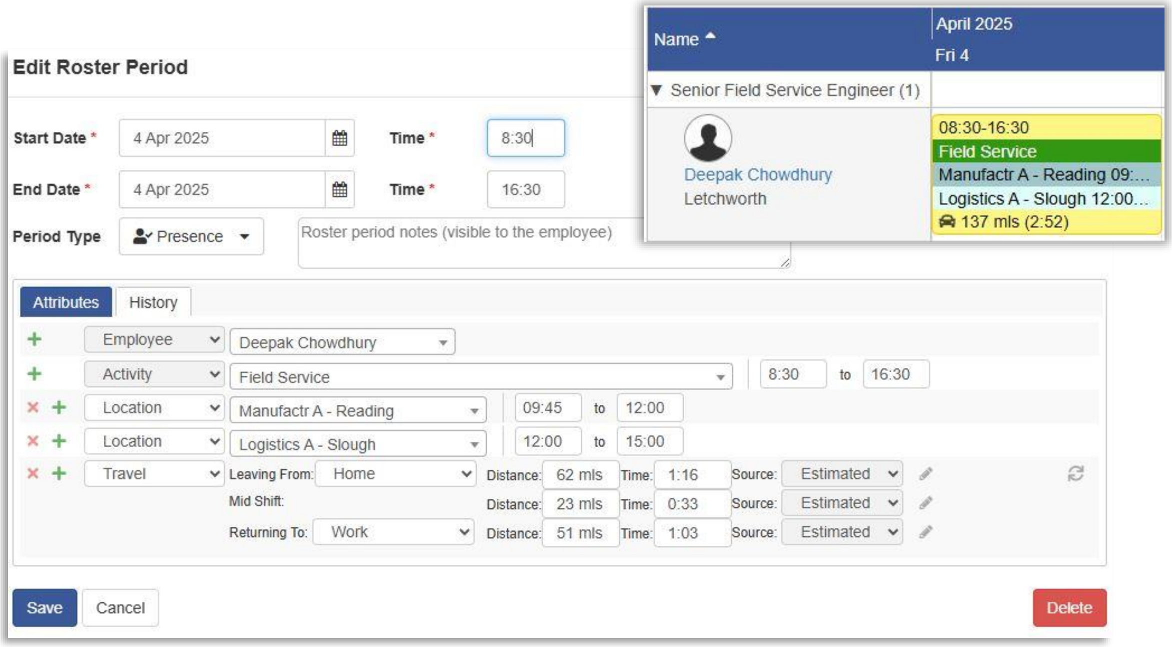
New Travel Module

T&A

The Travel Module is a new feature which calculates driving times and or distances between sites.

Travel can be configured for specific employee groups by cost centre or location. Mileage can be calculated from an employee's home address, work address on their assignment location or another fixed address entered against the group. Travel can be calculated between multiple locations on a shift for different work sites. The calculations can be written to specified balances for each employee.

Below is an example of an employee travelling from their home address in Hitchin to two customer sites and then returning to work.



Please contact Sales for further information on this module.

Improvements to the Roster Planning Screen *T&A*

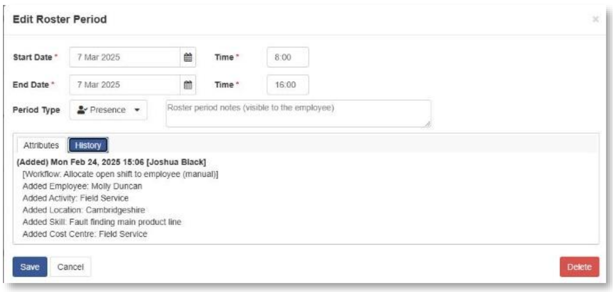
Key for Roster Screens

On the bottom row of the Roster screens there is a new Key icon 

When selected a pop up appears on the roster screen showing a key of the colours of the primary attribute of the period types displayed. In the example below this is colour assigned to Activities for Presence periods and Absence Reason for the Absences.

Open Shifts

T&A

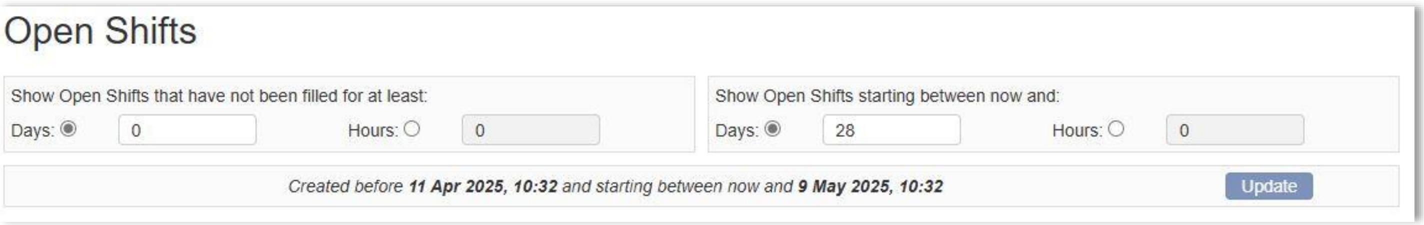


Open Shift Email Links Audit

Links in emails used to Accept or Decline requests and Open Shift invitations, previously displayed as System in audits when the user was not logged on, will now show as the person actioning the link.

Open Shifts Screen Filters

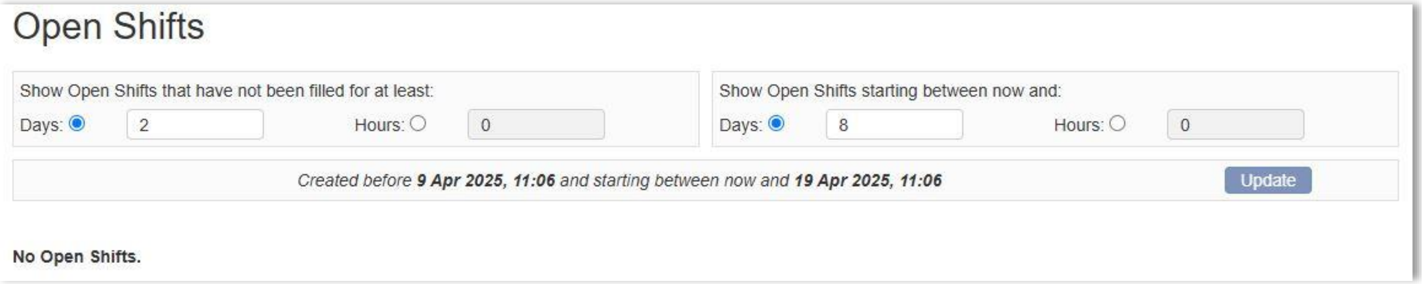
The Open Shifts screen has been updated with two filters that can work in conjunction to help manage Open Shifts that have not been filled yet. The filters are Show Open Shifts that have not been filled for at least and Show Open Shifts starting between now and. The default is to display Open Shifts for the next 28 days as shown below. The filters can be set for Days or Hours to give finer selection control.



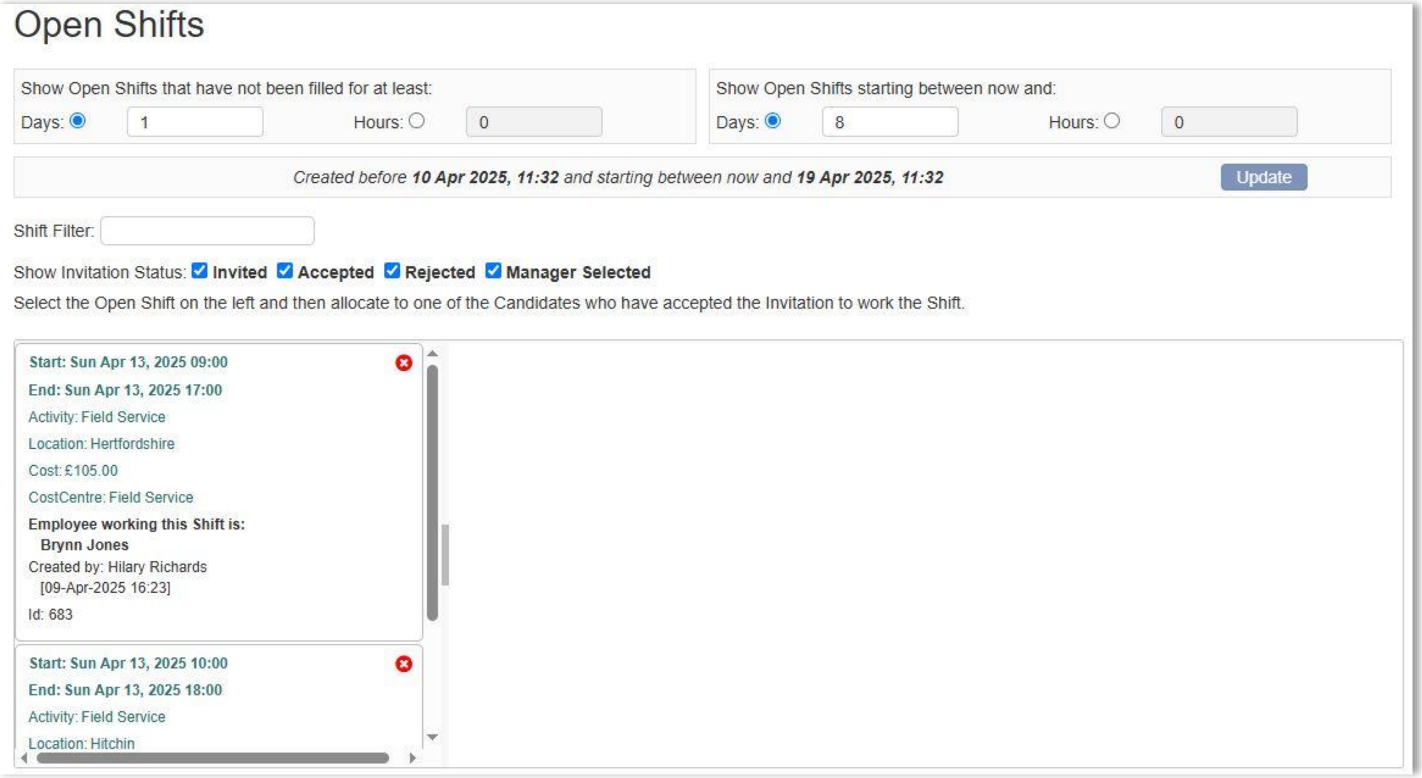
When changing the filters select the Update button. The list of Open Shifts will still display with the Open Shifts closest to now at the top.

hfx it's about time

On the example below, no open shifts are displayed as none were created that have not been filled more than two days ago to start in the next 8 days.



By changing the first filter to 1 day rather than 2 days the Open Shifts set up before the time yesterday and not yet filled are displayed. The hours filter could be used instead and for example set to 27 hours to show Open Shifts created before yesterday 3 hours earlier than the time now.



Open Shifts email and SMS messages for invitations, deletions and employee selection now include the day of the week as well as the date.

Self-Service Changes

T&A & Flex

Employee Staff Numbers are now displayed on the Home Screen in Self-Service

End Dated Jobs

The Staff Requests screen on end dated jobs/assignments no longer has the New button to help stop mistakenly making a request against it.

Hide Geo-Location Map *T&A*

For customers with the Geo-Location license there is a new client setting, “Self-clocking in Employee Self Service: If geo-location is being recorded, inform employee and show map”. This is by default set to on for all permission profiles that have , “Self-clocking in Employee Self Service records current geo-location if available” set. With the new permission switched off, when clocking in on Self-Service the employee will see a message “Your clocking has been recorded” but not see a map. The location is still recorded and visible on the Admin history screen by clicking on the pin icon in the Info column.

Absences

T&A & Flex

Auto Closure of Open Ended Absences

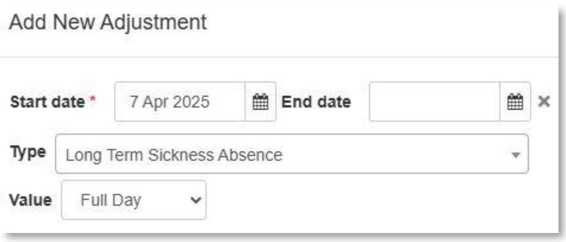
There is a new feature where open-ended absences can be added on the history screen. To enable the feature, contact your Project Manager or Support.

A client setting “Open-ended absences default to N days after today” will be available for Client Admin permission profiles.

The Adjustment types suitable to be used as open-ended will also need to be updated with a new setting “can be entered as open-ended on the history screen”.

Once enabled an absence entered on the history screen has a compulsory start date, indicated by the red star but does not have a compulsory end date.

The Open ended absence will be automatically closed when there is a clocking. Below for example, the person had an open-ended absence on a Friday with no shifts on the Saturday and Sunday, on Monday they clocked in. The overnight calculation detected the clocking and closed the open-ended absence on the Friday.



Date	Planned	Actual	Clockings
Mon 24 Feb 2025	Office Admin 0900-1700 +	Long Term Sickness Absence	+
Tue 25 Feb 2025	Office Admin 0900-1700 +	Long Term Sickness Absence	+
Wed 26 Feb 2025	Office Admin 0900-1700 +	Long Term Sickness Absence	+
Thu 27 Feb 2025	Office Admin 0900-1700 +	Long Term Sickness Absence	+
Fri 28 Feb 2025	Office Admin 0900-1700 +	Long Term Sickness Absence	+
Sat 1 Mar 2025	+		+
Sun 2 Mar 2025	+		+
Mon 3 Mar 2025	Office Admin 0900-1700 +	Office Admin 0900-1700	09:00 17:00 +
Tue 4 Mar 2025	Office Admin 0900-1700 +	Office Admin 0900-1700	08:59 17:02 +

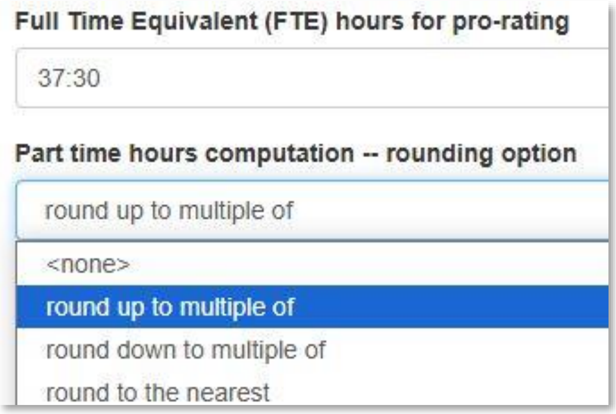
Prevent Duplicate Full Day Adjustments

Duplicate Full day, AM or PM adjustments of the same type can be prevented by enabling a new client setting “Staff Adjustments -- Prevent duplicate Full Day, AM or PM adjustments from being created”. An employee adding a duplicate request in Self-Service will see a message on the request seen that there is an existing adjustment. If the message is ignored and the request is accepted again only 1 adjustment is created. If a manager attempts to add a duplicate absence it will fail. For duplicate adjustments sent via an API an absence is not added and the Imperago system responds with a 422 message, for example, "A full day Absence of type Annual Leave from source User already exists on 20250314".

General Changes

Entitlement Schemes Rounding

T&A



When an entitlement scheme is pro-rated from full time to part time the value can now be rounded and is useful for hours based entitlements. The rounding has three options, round up to a multiple of, round down to a multiple of and round to the nearest. The second setting which works in conjunction with the first is value. With a value set to 60 if the Full Time Equivalent value before rounding was 84:22 and the round up option was selected the rounded value would be 85:00.
Please do not change any existing running schemes without contacting Support or your Project Manager.

The **Calculation start date override** for a job/assignment is now displayed in the All Employees screen in the Calc Override column. Right click in the grid to add and then save it to your grid profile.

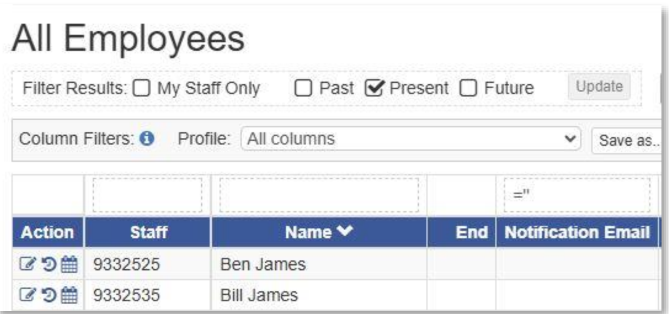
Roster Period Times Using a Non-UK time Zone

T&A

Previously in Imperago roster period and exception times created on a PC not on GMT during wintertime or GMT+1 during summertime were converted from the time entered on the system to the local time zone of the PC. For example, on a PC set to Central European Time a shift could be entered as 09:00 – 17:00 but would be converted to display 10:00 – 18:00. In this release the time entered for roster periods and exceptions will not be converted to the PC local time.

Grid Filters

T&A, Flex & Access Control



Grids such All Employees can now filter their columns to show which employees don’t have a value for example against their notification email, mobile or payroll group. To check a column for an empty cell at the top type equals symbol and a single quote mark twice =’’
A column can also be checked for cells that are not empty by typing using the symbol for exclamation mark, the equals symbol and a single quote mark twice !=’’
On the grids which support it there is now an information tip for Column Filters which shows searches that can be used.

Replace "TXT" with your text:

Operator	Syntax	Operator (1)	Syntax
Like	TXT	Equal **(1)**	=TXT
Like	~*TXT*	Not equal **(1)**	!=TXT
Like from the left	~*TXT	Greater than or equal **(1)**	>=TXT
Like from the right	~TXT*	Greater than **(1)**	>TXT
Not like	!~*TXT*	Less than or equal **(1)**	<=TXT
Not like from the left	!~*TXT	Less than **(1)**	<TXT
Not like from the right	!~TXT*	Between **(1)**	TXT1<>TXT2
In list of values **(1)(2)**	=(TXT1,TXT2...)	Is empty	=''
Not in list of values **(1)(2)**	!=(TXT1,TXT2...)	Is not empty	!=''

(1) Case sensitive
(2) If a comma exists in the cell, wrap it in single quotes.
Example: you wish to filter all rows where the Employee Name is "Joe Bloggs" or "John, Smith"...
To pass in the comma enter filter as "=(Joe Bloggs,John',' Smith)"

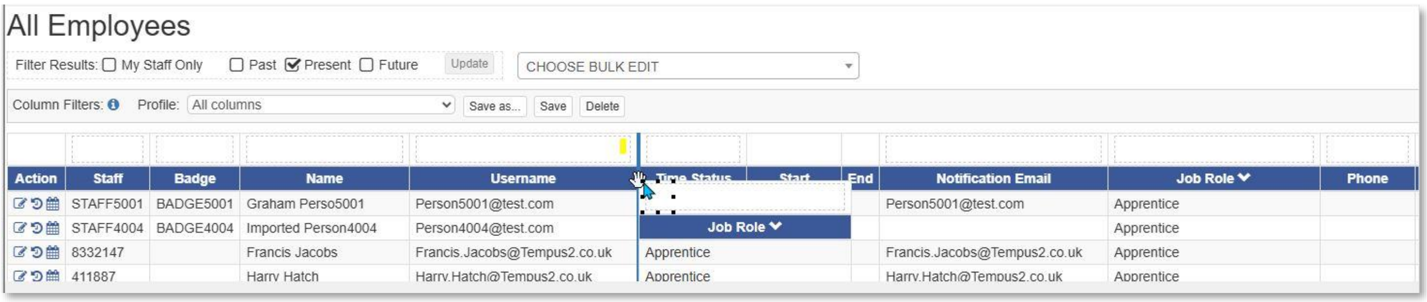
hfx
it's about time

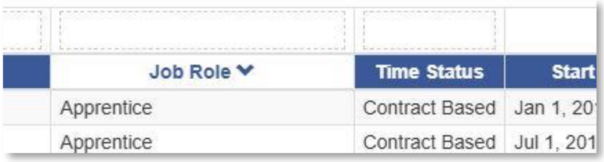
Changes to Appearance

Moving History Screen Columns

T&A & Flex

On the History Screen now when moving a column by clicking in the title box , a hand icon is displayed to show it can be dragged. The grid scrolls to the complete left or right making it easier to position the column. The position of where the column can be dropped is shown by a vertical blue line. The column header box colour is highlighted in white to make it easier to distinguish which was the last column to be moved.



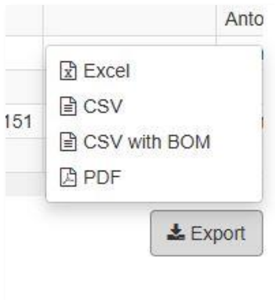


Display of Page Numbering

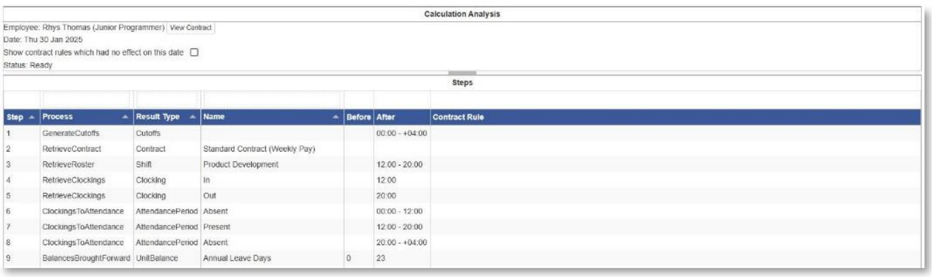
T&A & Flex

Page numbering on screens will show the first and last numbers and a new icon ... which when clicked on displays a number picker control. A page number can be entered directly or the up and down arrows used.

The last number entered will be highlighted in blue.



Exporting from grids now shows as a pop up when clicking the Export button

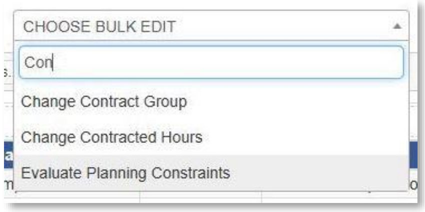


The Calc Analysis screen *T&A* displayed when clicking on the history microscope icon on the history screen is now displayed to look like the grids with blue title columns and alternate striped rows.

Bulk Edit Drop Down Selection

T&A & Flex

On the All Employees page the Bulk Edit option now has a drop down selection with a search facility.

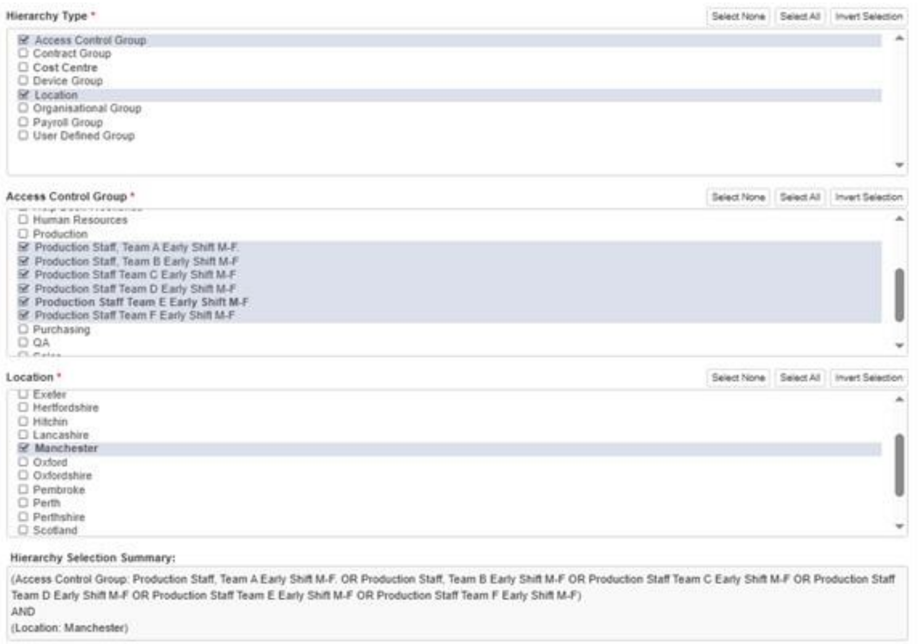


Reports

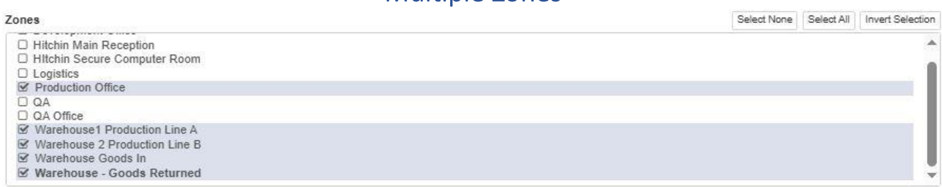
The Access Control Report now has additional selections for employee and hierarchy. Multiple zones can now be reported on as well.

Employee selection

Employee hierarchy types, e.g. Access Control Group & Location.



Multiple Zones



History Report Latitude/Longitude - For customers with the Geo-Location license there is a new client setting, “Clocking Status & History reports: show latitude & longitude next to Clockings”. This setting is off by default. The reports will show in square brackets the latitude and longitude of a clocking with the accuracy in brackets afterwards, e.g. [51.2222,10.4444 (1000m)].

Resolved Issues

- Exporting from the Staff Roster Screen to Excel or CSV files did not include the Employee fields for Job Role, Panned Hours, Contracted hours and Cost.
- Open Shifts requests that have been accepted and are in the past used to disappear from the Requests Lists page.
- Absences migrated from a previous assignment would show in the History screen but not on the Staff Roster, now show on both.
- The Grid filter to display items that do not match is resolved, for example filtering the All Employees Location column using !=(Birmingham,Manchester) will displays employees without Birmingham or Manchester as their location.
- Clicking on an acceptance link in an email notification for an employee’s request will no longer allow the request to be accepted if the request has been cancelled by the employee.
- The Manage Job Skills page will now only display current employees with skills.
- Queued Reports can now be deleted from the Queued Reports list page.
- Date cycles that have been used in date tracked records can no longer be deleted, for example a Public Holiday Calendar.
- When employees have delegated for another employee, this is logged in the Delegation Episodes screen, this screen can now be exported.
- For Hours based Annual Leave Entitlements using a timed absence if the shift was slipped this was previously not subtracted from the annual leave deduction.
- The permission for Employee field - annual leave allowance - edit' now controls the Bulk Edit options for Change Annual Leave Basis and New Annual Leave Allowance.