

Dynamics GRC/HSE Release notes



Human Resource Management

for

**Microsoft Dynamics 365 for Finance & Operations™**

*Dynamics SHR version* 10.33.1620.3

2025-08-22



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| Dynamics 365 FO SHR module SHR is an add-on for Dynamics 365 suite of business application software.  This software provides compelling functionality to support Human Resource Management. |  |
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Release version

**SHR Package version:** SHRDeployablePackage\_10\_33\_1620\_3

This package was created on Microsoft Dynamics 365 for Finance and Operations:

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| **Release** | **Version** | **Build number** |
| Application release | 10.0.42 | 10.33.1620 |
| Platform release | Platform update 66 | 7.0.7452.66 |

# Enhancements:

| **Module** | **Description** |
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| Performance | * A new tab was added to **Human resource parameters** for **Performance**. A field was included to allow a **User group** to be selected to allow members of the group to delete performance appraisal records irrespective of the record status. * The **Performance rating** setup form was enhanced to allow the definition of various rating grids in order to accommodate scenarios where KPIs, making use of measurements to calculate the results; may select rating results unique to that KPI and its measurement. One grid must be defined as the default grid, to be used when a measurement has not been defined for a KPI or a grid has not been defined for a measurement used to calculate the KPI results. * The **Measurements** setup form now includes a **Performance rating grid** field to select an alternate rating grid to be used when the KPI results should be automatically added based on the KPI measurement calculation. The auto calculate combination slider button must be set to Yes to enable the performance rating grid field. * The **Performance scheme** setup form has been enhanced as follows:   + Adding/Removing new lines to the **KPA grid** automatically updates the **KPA sequence number** instead of defaulting to 0 and requiring manual entry.   + Buttons have been added to allow KPAs to be **Moved up or down** in order to display the KPAs in the correct sequence. The KPA sequence numbers are automatically updated.   + A short **Description** column has been added to the **KPAs grid** to allow for easy identification of the KPA at a glance.   + When the **KPA description** is entered, it is automatically added to the **KPA memo box** as well. The explanation in the memo box may then be expanded if required.   + A **KPIs grid** has been added to allow shared KPIs to be set for use when creating performance appraisals thereby improving efficiency and ensuring required KPI’s are included for performance appraisal records.   + Adding/Removing new lines to the **Qualities grid** automatically updates the **Quality sequence number** instead of defaulting to 0 and requiring manual entry.   + Buttons have been added to allow Qualities to be **Moved up or down** in order to display the Qualities in the correct sequence. The Quality sequence numbers are automatically updated.   + A short **Description** column has been added to the **Qualities grid** to allow for easy identification of the Quality at a glance.   + When the **Quality description** is entered, it is automatically added to the **Quality memo box** as well. The explanation in the memo box may then be expanded if required.   + **Horizontal and vertical separator bars** have been introduced in the form to allow the user to decrease or increase grids thereby improving user friendliness of the form. * Performance appraisals enhancements introduced:   + On the **All performance appraisals** list additional columns were added for:     - Position number     - Position description     - Department     - Manager   + When creating a new performance appraisal record, the **Worker** dropdown in the dialogue now includes a filter for managers to see workers that report to them. The filter improves the process of selecting workers and reduces the risk of creating a record for a worker that does not report to the manager. A slider button has been included to **Show all** records, if the filter should be ignored in the dropdown and allow the selection of any worker. * Workers may now change the **Status** of the Performance record from New to **In progress** so as to ensure the process is not delayed. * Once a performance record is in progress (Status is not “Not started”), the record can no longer be **Deleted**, except by members of the user group defined in the HRM parameters for performance. * Label naming conventions in the KPAs and KPIs grid has been standardized and improved. * The **KPAs, KPIs and Qualities grids** will now all include the short **Description** columns to allow identification of the records at a glance. * **KPIs** and related **Measurements** are now automatically added to the performance appraisal grid if it was defined in the Performance scheme used to create the record. * **Measurements** for KPIs now include a **Mid-year and Year-end minimum rating** to cater for calculations where a variance value should be considered and inverse calculations are required. The **calculation** of KPI outcomes have been updated to include the variances and now allows for negative rating when a higher actual result is not a positive outcome. * **Horizontal and vertical separator bars** have been introduced in the form to allow the user to decrease or increase grids thereby improving user friendliness of the form. * The **KPA comments** fast tab at bottom of all performance appraisal records index tabs, has been improved to include the KPA description in the grid to allow identification of the KPA related to the comment at a glance. * On the **All worker development actions** list additional columns were added for:   + Position number   + Position description   + Department   + Manager |
| Courses | * On the **Course participants form:** * The **Transcript report** was updated to include a field for the entry of an **Instructor name** per module topic   + A **Certificate of completion** report was added for passed module topics in the **Transcript report**   + Dropdown for **Goals** in the Learning outcomes fast tab, has been improved with a filter to only list goals for the specific worker (participant). * On the **Course module** form:   + A field group heading was added for the **Topics** grid   + A **Goals memo box** was added below the topics grid * **Learning workspace:** * **Announcements** text was added * The **Goals list** displayed when the Goals tile is selected, now includes the **Date finished**. |
| Sector education and training authority (SETA) | * **Occupational framework for occupation codes** setup form has been improved to automatically complete the Parent code; Major group code; Sub-major group code; Minor group code; Unit group code and Occupation group code, based on the OFO code used to create the record. * **Trade; Green occupations and Green skills** slider buttons have been added. * **OFO** code entry in **Jobs** have been improved so that when an occupation or specialization group code is entered; the Unit; Minor; Major; Sub-major and Major group codes; Trade; Green occupation and Green skill are automatically selected displayed and does not require manual entry. * The menu item name for the **SETA** report was updated to **Sector education and training authority** |
| Security roles | * Additional privileges have been added to the **SHR Manager duty**: * Maintain performance scheme * Maintain performance period control * Maintain succession plan * Maintain talent matrix * A new role was created: **SHR Administrator**. This role includes all duties of the SHR Line manager as well as the SHR Management duty and additional privileges for:   + Maintain employee relations status   + Maintain talent matrix setup   + Maintain rating box setup |

*Bug fixes:*

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| **Module** | **Description** |
| Performance | * On the **Performance appraisal KPA’s and KPI’s** index tab, spelling of the word ‘Achievement’ was corrected. |
| Courses | * The count of the number tile for **My goals** have been corrected in the **Learning workspace**. * In the **Courses Enquiries and Reports**; the **Regional economically active population** report label for **Western cape** has been corrected. |
| Sector education and training authority (SETA | * Filtering and sorting of the **Occupational framework for occupation codes** setup form has been resolved to show all created codes. * The **data entity** has been corrected to allow for importing of the OFO codes. |

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