

9.08 SP2 Maintenance Release

Overview

Release 9.08 SP2 is a Sparkrock service pack. It includes functional enhancements and defect corrections for existing features. While the focus of this release is primarily on Workforce, some minor improvements have also been made to Finance. Important defect fixes have been made throughout the solution, and we encourage all customers to carefully review these release notes and to discuss a possible upgrade with Sparkrock.

The following changes are included in this release:

Updates to Finance

The following features were added to the **Finance** module for version 9.08 SP2:

Cash Management

- The **Entry Cleared**, **Date Cleared**, and **Amount Cleared** fields now automatically update when a bank reconciliation is posted (if the Import Bank Statements feature is not used).

The system immediately updates these three fields for Electronic Payment entries upon posting of the Payment Journal since it is presumed that all EFT payments always clear the bank.

Online Expense Claims

- All types of expenses can now be detached from an Expense claims. Previously only credit card lines could be detached.
 - For expense claim approvals, the line number for expense lines which the current approver needs to review and approve will be highlighted. This applies only to threshold approvals, where one or more dimension values on the line matches the assigned dimension values for the current approver.
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Purchasing

- When creating or modifying a purchase request, the posting date can be changed if the **Posting Date Non-Editable** check box is not selected on the **EWA Setup** card. Previously in this scenario, the Posting Date could be set to a date earlier than the Receipt date. This is no longer permitted.
 - On the online **Purchase Requisition** page, the **Location** drop-down now supports type-ahead to help narrow the list of choices when there are many locations.
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Updates to Workforce

The following features were added to the **Workforce** module for version 9.08 SP2:

Absence Management

- Approved Absence Requests with a starting date greater than today's date can be reopened, canceled, or deleted if the Absence Request has not been processed through Payroll and linked shifts have not been worked. When an Absence Request is canceled, there is an option to restore the employee to their originally scheduled shifts or to leave them replaced/vacant.
- When creating Absence Requests, you can now select from an alternate list of approvers, which includes direct managers or a manager's manager.
- When an employee submits an absence request, the system will now send an email to the approver's delegates, if any, in addition to the approver themselves.
- Team Absence Calendar has a new **Include my requests** option which shows the current user's absences on the calendar. It is selected by default.

Appraisal Management

- Improvements have been made to how the Appraisal **Due Date Calculation** field works. The field now requires that a direction be provided for the due date calculation (that is, **+** for a future date or **-** for a past date). You will receive a message noting that a **+** or **-** should be provided for the date calculation.

NOTE: When you upgrade, a **+** is automatically added to legacy values in the **Appraisal Due Date Calculation** field.

Base Platform

- Serenic HCM has updated code to correctly display the Employee Count Tiers, based on the following database employee counts: Up to 100, 250, 500, 750, 1000, 1500, 2000, 2500, 3000, 3500, 4000, 4500 and Unlimited employees.
- Numerous field changes and minor fixes were made to several areas:
 - On the **Altus HR Setup** page, the **Use Date Worked for Appraisal Due Date** field was moved to the **Appraisals** FastTab.
 - The **Union Code** field was added to the **Grievance** and **Collective Agreement** pages.
 - The **No. of Negotiation Days** field on the **Collective Agreement** page now correctly calculates the number of negotiation days.
 - The **Add Delete All Lines** action was added to the **Entitlement Worksheet** page.
 - The **On Leave** and **Cause of Inactivity** columns were added to the **Entitlement Worksheet** page.
 - The **HR Requests** action was added to the **Employees Card** and **Employees List** pages.



Benefit Management

- Improvements were made to the OTIP HRIS Export functionality, so that it works in a similar way to the existing ONE-T HRIS Export. This improves the ability to monitor specific fields for changes which trigger reporting events. Once the new functionality is installed, you should create an Initial export file for a previous point in time. This will become the basis for the **History** table, which monitors changed values that are important to OTIP HRIS reporting.

As part of this change, the mapping between the third party benefit code and the Payroll Control Code will now accept Position Specific controls. The imports create the Employee Payroll Control entries as **Position Specific = TRUE**. Employee Payroll Control entries are created for each employee assignment (HR PLE) that meets the Union Code from ONE-T/OTIP Setup.

NOTE: *Using this new functionality will require setups to be performed. The original OTIP HRIS Export will be deprecated. For more information, see [OTIP HRIS Export](#).*

- The ONE-T Payroll Import was modified to ignore trailing commas in the HDR and TRL records of the import file.

Payroll Administration

- The AMT STAT PAY MULTI method step was added to enhance the Statutory Pay computation to create separate journal lines for each holiday, with the **Date Worked** indicating each holiday.

Position Management

- The **Copy from HR Position** function has been enhanced to also copy fields specific to the OTIP and ONE-T HRIS Integrations. These fields include **Location Class**, **Member Plan**, **Benefit Eligible**, and **Default Attendance Plan Code**.
- The **HR Request Import** was modified to allow certain non-essential fields to be skipped.
- The Frontline AMS (formerly Aesop) integration was updated to work with modern system infrastructure in both NAV and Frontline Absence Management.

Employee Management

- In previous releases, the **HR Rep. No.** and **HR Rep. Name** fields on the **HR Employee Card** page were hidden when the **Enable Advanced Position Mgt.** checkbox was selected on the **Altus HR Setup** page. These fields are part of the basic HR system and now display under all conditions.
- Performance of the **HR Position Ledger Entry** pages was improved to better handle opening a large number of records.

Employee and Manager Self-Service

- You can now hide certain data on the **Employee Center Profile** page, in cases where you do not use the corresponding elements of our solution. These elements are hidden by selecting the corresponding check box on the **HR Setup** page. The hideable areas are:



- Under **Assignment**, hide the **Pay Structure** section.
- Under **Admin & Benefits**, hide the **Progression** and **Probation** dates and hours.
- Under **Admin & Benefits**, hide the **HR Representative** details section.
- The **Hide Hrs per Week** and **Hrs per Day** field was added to the **EWA Profile** card and its corresponding list pages. This field enables you to hide the **Hours/Day** and **Hours/Week** fields from the following Employee Center pages:
 - Profile
 - Employee Profile (My Team)
 - HR Requisitions

Employee Scheduling

- Added help text to the **Shift Details** page to clarify the purpose of the **Activity** drop-down in the **Employee** section.
- **HR Request Details Change** now automatically updates the shifts in the schedules with the new **HR Position Ledger Entry No.**
- Approved Training with a starting date greater than today's date can be reopened, cancelled, or deleted if the Training has not been processed and linked shifts have not been worked. When Training is canceled, there is an option to restore the employee to their originally scheduled shifts or to leave them replaced/vacant.
- A new action has been added to the **Training Registration** page's **Create Daily Schedule** command, which is applied when matching training schedule to shifts. Shifts will be split based on the start and end time of the daily schedule and the start and end time of the shift.
- When creating a schedule from a template, the system now searches for the current **Employee Position Entry No.** that is valid as of the shift's work date, so that the newly created shift is considered valid immediately.
- When approving or processing an Absence Request that occurs during a shift, the shift is split based on the request's start and end time.
- Clicking **Fill**, **Offer**, or **Replace** on a shift filters the list by the position. Supervisors can then change the filter to all positions or another position. The filter together with the search on the Employee Name will help find staff more easily.
- Employee Center: activities can now be edited on the **Change Request** approval page.
- Employee Center: The legend and **Non Clocked Shifts** and **Pay Cycle Hours** columns on the **Approve Shifts Worked** page are not shown when time clocking is off for a user.

Defects Corrected in Finance

The following **Finance** defects were resolved in version 9.08 SP2:

Accounts Payable

Case/Task Number	Description
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https://customersuccesscenter.sparkrock.com/What's_New/Manage_-_Finance_and_Workforce_for_Sparkrock_2016/Releas...

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CAS-16526-N7K4	When posting purchase documents with tax included, the system was posting an incorrect amount if a line was marked Tax Liable, but the Tax Area Code and / or Tax Group Code fields were empty.
	This condition is no longer possible; all Tax Liable lines must have valid Tax Area Code and Tax Group Code values.
CAS-17725-H0R4	When previewing the AP T4A report, the preview displayed a blank form with the data appearing beneath the form, rather than as an overlay on top as would be expected.

Cash Management

Case/Task Number	Description
CAS-16831-H4L4	When Dimension Validation Setup is enabled for deposits and the dimension validation errors out, users were unable to see document warnings on the Ribbon.

Financial Analysis

Case/Task Number	Description
CAS-17309-F6C6	On the Employee Center Financial Analysis page, clicking Export when no data has been loaded causes an error.
CAS-13089-F7W4	In Financial Analysis, the Non-Zero Lines Only filter did not honor the EWA G/L Account Filters. The filters did suppress the calculation, but unwanted G/L account lines could still appear with zero values for all columns.

Online Requisitions

Case/Task Number	Description
CAS-17430-G7Y8	When selecting the local currency when creating a new vendor in Employee Center, a "different currency" message incorrectly appeared, and there were subsequent PO issues in NAV.
CAS-16057-N3G0	The Payment Information section on the Purchase Invoice page incorrectly displayed the status of checks as cashed when they had not been cashed.
CAS-17825-D9P5	When entering the Due Date on Payment Requests, the value was overwritten by the



invoice date.

- 2116 The font on the options related information on the **Purchase Requisition** and **Payment Request** print views was larger than the rest of the text.
- 2152 Codeunit 23020500 (AEP Purchase Request) was showing twice in the **Web Services** page.

Purchasing

Case/Task Number	Description
CAS-12168-J3Q0 CAS-15537-D4H1 CAS-16956-D4G4	For Purchase Requests, the Receipt Date Calculation field from the EWA Setup page was not added to the Receipt Date and Posting Date field when the Enable Purchase Order Printing check box (also on EWA Setup) was not selected.
CAS-16567-C7J7	When clicking Change Vendor on the ribbon from a Purchase Order to change the Buy-From or Pay-To Vendor, the Location Code was not retained.
CAS-16987-K5H0	In some circumstances, creating a purchase line of type Fixed Asset produced a "Specify a filter type for the Type field in the Option Value table" error.
CAS-17525-R8W4	Expense type category filters did not function properly if the category contained an ampersand or other special characters.

Defects Corrected in Workforce

The following **Workforce** defects were resolved in version 9.08 SP2:

Absence Management

Case/Task Number	Description
CAS-15641-G1T3	Approving Absence Requests on Employee Center registers the manager instead of the actual approver.
CAS-17231-R2B8	A problem could occur when entering absence requests as a delegate. If the employee who was the delegator had specified more than one delegate, and the employee acting as the delegate was not the first delegate specified, a mismatch occurred and Employee Center would not allow the request to be submitted.
2297	Absence Request Approval emails show incorrect times.



2347	Manually assigning Attendance Plans when you have an HR Request Header record with blank HR Request No. did not function correctly.
2382	While approving absence requests as a Delegate in Employee Center, when the request reloaded in Approved state, an error is displayed.
2629	In Firefox Private Mode, on the Manager Self-Service Attendance Approvals page Delegate For is shown when delegation is not in effect.

Appraisal Management

Case/Task Number	Description
CAS-16280-G9G6	Appraisal entries were created via HR Requests (using the appropriate appraisal functions), even if the HR Position does not have a First Appraisal Code.

Benefit Management

Case/Task Number	Description
2270	The HR Position Ledger Entry No. field was not being correctly populated on the HR Request Line during the processing of HR Requests.

Collective Agreement Management

Case/Task Number	Description
1845	The Grievance Costs page did not scale properly when resized.

Employee & Manager Self-Service

Case/Task Number	Description
CAS-17589-C1L6	In certain cases, the User Profile associated with new Employee Center users was not working correctly.
CAS-17969-V6N0	When using the Employee Center in Google Chrome or Microsoft Edge, using zoom levels other than 100% made the file upload buttons unusable.



Employee Management

Case/Task Number	Description
CAS-16393-L2Q8	When processing HR Requests that include "Assign Employee Training/Qualification Details (11)" steps, certain fields (for example, From Date , To Date , and Expiration Date) were pre-filling with incorrect data.
CAS-16874-Z5V1	The ONE-T HRIS Export was not correctly reporting the Work Status or Work Status Effective Date when an employee retired.
2005	The OCT integration was failing due to various data related issues. Code as added to prevent these types of errors in the future.

Employee Scheduling

Case/Task Number	Description
	When processing employee change requests for shifts with multiple activities, the activity duration validation check prevented Supervisors from accepting the change. Activity edits are now enabled on the change request approval view, so that Supervisors can adjust the activities as needed.
CAS-13980-H6R0	NOTE: After the activity change is made, but before the change is approved, the duration mismatch error "The Activity duration does not match the Shift duration." displays. This is expected, and the error should clear once the change is approved. (If it does not, then there is a true mismatch in the times, and the supervisor should double check the activities.)
CAS-16500-R2D6	When creating a shift, making multiple changes to the start time in quick succession could cause an out-of-date record error message to appear.
CAS-16954-H4Z2	Comments on shifts in Schedule Templates were not transferred to the shift instances when the Create Schedule function executed.
CAS-17098-B7X3	The Update Shift Employee Position (23020254) batch report that is used to update all shifts that are connected to employees so that they contain the correct Employee Position Entry No. was not updating template records. This has been fixed.
	This batch report was also improved so that it validates modified shifts and provides a scroll bar for the user. If an employee has two active assignments with the same HR Position Code, the first one will be used when updating the template.
CAS-17068-Q0H8	The Copy Shift action on the Shift Template Card and Schedule Card was not transferring the employee's assignment number to newly created shifts correctly.



Also, the **Overwrite Existing Shifts** option (Template only) was not working properly when the user was copying more than one shift at a time.

Improvements were made to how Employee Scheduling handles time zones. This was done to address cloud-based scenarios where the servers may be set to use a different time-zone than the one in use for the scheduling users.

CAS-17430-G7Y8	For example, servers may be set to Coordinated Universal Time (UTC) while users are in the Mountain Time zone. The times in NAV will always be stored in UTC and the Employee Center will adjust them based on the current browser locale.
CAS-17840-S6T8	When a shift is made vacant, any previous offers or bids recorded against the shift are removed, so that it is treated like a new shift for the purpose of making offers or accepting bids.
CAS-18002-H2J8	In some circumstances, employees did not receive a confirmation email when accepting an offer placed that employee into a shift, or when a supervisor accepted a bid which placed that employee into a shift.
1406	Creating a new shift from the Shift List page generated an error. The option to create new shifts from the Shift List page is no longer available, and shifts should be created only from the schedule.
1968	When using Time Clock, an employee could not clock out of a shift after it had ended if the amount of time that had passed exceeded the Clock Time Tolerance on the Schedule Setup page. This time has been extended to two hours. If another shift for the employee starts within that time, the employee must clock out of the first shift before they can clock in for the second.
2035	When a details change is made to an employee's assignment, in some cases shifts that were already scheduled are not updated to reflect the changes.
2063	The Shift Template Import was not assigning a value for the Employee Position Entry No. field when shift templates are assigned to employees.
2134	While loading Web Services, the incorrect Schedule Setup page was referenced.
2148	Update Schedule from Training no longer impacts shifts that are Absent , with status All Transferred or All Posted or have clock ins or outs.
2222	In Employee Center, creating an activity outside a shift causes a blank error message to appear.
2693	Vacant shifts no longer show Scheduled Time box.

Payroll Administration

Case/Task Number	Description
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CAS-15497-Y0F9	HR Function Code 12 (Attach Payroll Control Group from HR Position) was ignoring the Payroll Control's Position Specific field. If a Payroll Control is "Position Specific", then HR Function Code 12 will now only create an Employee Payroll Control record for the HR Position being assigned to the employee.
CAS-16477-G1X0	OTPP Calculate function (R23032215) no longer generates a divide by zero error when the FTE on the active assignments is zero.
CAS-17453-J1D2	The Amount field on Employee Other Auth Info table no longer displays the bracket amount for the filing status code.
1965	When importing payroll lines in the Payroll Journal, using Override Dimensions was not actually overriding the dimensions from the employee assignment.
2139	The Pre-authorized payment functionality was not creating the electronic banking file correctly.
2303	Resolved an issue where the filing status description could be 50 characters, but the flow field to display that description in Employee Other Auth Info was only 30 characters. This has been resolved by increasing the length of the flow field.

Position Management

Case/Task Number	Description
CAS-17180-C3R4	An error could occur when processing the Insert Default Tax Authority for Employee (42) step on an HR Request when a date format on the server is set to yyyy-mm-dd.
1914	The Create HR Request action from the Employee card did not populate employee demographic information on the HR request. The test on HR Requests that warns users when the combined FTE exceeds 1.00 was running even when the request was approved, completed or canceled. This has been resolved.
2033	You can now enable or disable this test using the Enable HR Requests FTE Warning field on the Altus HR Setup page.

Upgrade Considerations

This section highlights key considerations when upgrading from earlier versions of the Sparkrock solution to version 9.08 SP2.



Licensing

Your Project Manager needs to have your license regenerated and applied to your test and live environments. A new object was added to resolve issue # CAS-16603-V3K6.

New Process Step for Employee Scheduling

We have added a new process step for Details Change that impacts only customers using Employee Scheduling. The new process step is 52 and it is used to update the HR Position Ledger Entry No. on the shifts in the template upon Details Change. It is loaded automatically as the last step for Details Change when using Load Standard Data or it can be added manually if you do not want to override existing HR Reason Codes setup.

New Tables

The following tables have been added in version 9.08 SP2:

- 23020505: Omitted Dimension Value
- 23020701: Schedule Unit Shift Buffer
- 23032883: Absence Request Approver Buff.

