Sparkrock 365 Fall 2020 Release Notes

November 2020

These release notes include supplemental information about the Sparkrock 365 Fall 2020 release.

Topics include:

Revision history

The following table lists the revision history for these release notes.

Revision	Date	Description
01	December 2020	Added Permission Sets updates subsection to the Upgrade considerations section.
00	November 2020	Initial version.

Highlights

The following sections highlight the major accomplishments in this release.

Platform

- Microsoft Dynamics 365 Business Central updated from 16.5 to 17.0
- Role Center updates
- Data Exchange Definitions are now automatically loaded
- French Canadian language support

Finance and Procurement

- New Charitable Receipts page
- Account Set support for Recurring Sales and Purchase Lines
- Control Budget Check visibility options

HR Management

- Limited Access HR Requests
- K-12 enhancements for organizations in Ontario:
  - OTPP – Capability to report Pension Adjustment Amounts
  - OMERS – Capability to report Pension Adjustment Amounts
  - OECTA – New Worksheet
  - OTIP – HRIS Export enhancements
- Notifications for mySparkrock changes
- HR Request Worksheet Additional Assignments per Employee
- HR Request-Leave – Gradual Return page enhancements

Payroll Administration

- Improved performance of US payroll checks and Canadian payroll cheques
- Refresh Record of Employment (ROE) Details
- Compensation Journal enhancements
- Increase Pay Code Multiplier to 4 decimal places
- Progression by Selected Hours Quantity

Scheduling and Time Entry

- Training Management integration to Employee Scheduling
- mySparkrock Scheduling and Time Entry enhancements
- New core product and mySparkrock Time Clock feature

New features and changes

Sparkrock 365's Fall 2020 release introduces exciting new features and enhancements to existing functionality.

Platform

Microsoft Dynamics 365 Business Central 17.0 update

The base Microsoft Dynamics 365 Business Central platform, which powers Sparkrock 365, has been updated from 16.5 to 17.0. To view a detailed list of cumulative platform fixes that are available from Microsoft, see Update history for Microsoft Dynamics 365 Business Central.

Note: In this release, the Business Inbox in Outlook is not supported for Sparkrock 365 powered by Microsoft Cloud.

Terminology

Core Product

The term *core product* distinguishes between the mySparkrock web interface and the interface which includes and extends Microsoft Dynamics 365 Business Central. The latter is referred to as the core product.

Note: In these release notes, if mySparkrock is not mentioned, the interface that is being referred to is the core product.

Navigate / Related

On pages where you can choose **More Options**, the revealed choices are now **Actions** and **Related**. Related reveals any additional navigation options. Previously, the label **Navigate** was used instead of **Related**. This change corrects a navigation issue where two distinct **Navigate** action menu items appeared.

Data Exchange Definitions are now automatically loaded

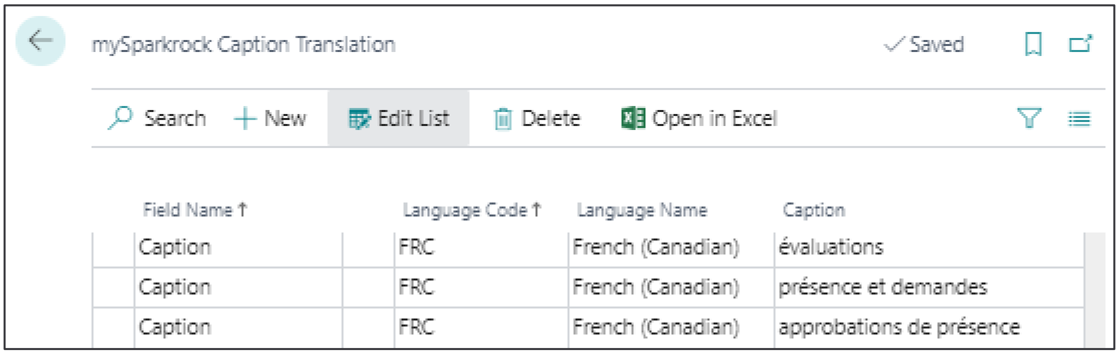
All standard Sparkrock specific Data Exchange Definitions are now automatically loaded during the Sparkrock 365 application installation or during deployments.

French Canadian language support

Sparkrock 365 and mySparkrock now include French Canadian language support. Finance and Procurement, Scheduling, Time Entry, and Payroll Administration in the core product and mySparkrock are generally supported. HR Management will be generally supported in a future release.
Note: The Microsoft Dynamics 365 Translation Service was used to translate content from English to French Canadian. Some translated content may be inaccurate due to the limitations of this service.

mySparkrock Caption Translation

A **mySparkrock Caption Translation** page has been added to support the localization of mySparkrock captions.



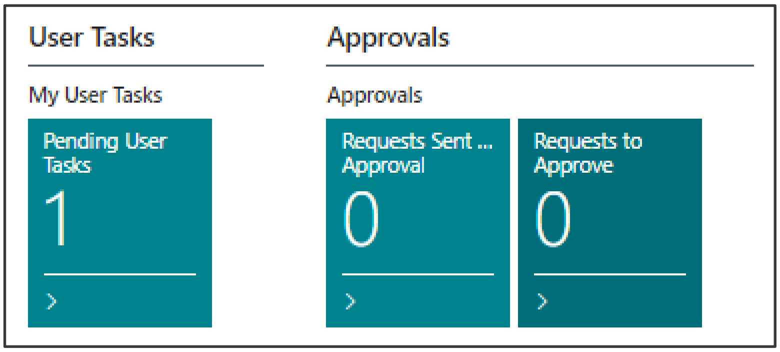
Note: If a caption does not include a translation, the default caption is displayed.

Role Center updates

The following sections include information about the role center updates in the Sparkrock 365 Fall 2020 release.

User Tasks and Approvals parts

In the Microsoft Dynamics Business Central 2020 Wave 2 release, Microsoft introduced for role centers, some new parts, and cues.



In the **My User Tasks** part, there is a **Pending User Task** cue, which can be selected to go to the **Pending User Tasks** page. In the **Approvals** part, there are **Requests Sent for Approval** and **Request to Approve** cues, which can be selected to go to the **Requests Sent for Approval** and **Requests to Approve** pages.

To support this change, the following Sparkrock 365 role centers were updated to include these new parts and cues:

- **Business Manager**
- **Security Administrator**
- **Accounts Payable Coordinator**
- **Accounting Manager**
- **Accounts Receivable Administrator**
- **Purchasing Agent**
- **Schedule Administrator**

On the new **HR Department Manager** role center and the **Finance Department Manager** role center, the **My User Tasks** part does not appear because this part is not supported for manager users. Only the **Approvals** part is displayed.

The **Human Resources Manager** role center was not updated because this role center uses cues that are specific to Sparkrock 365.

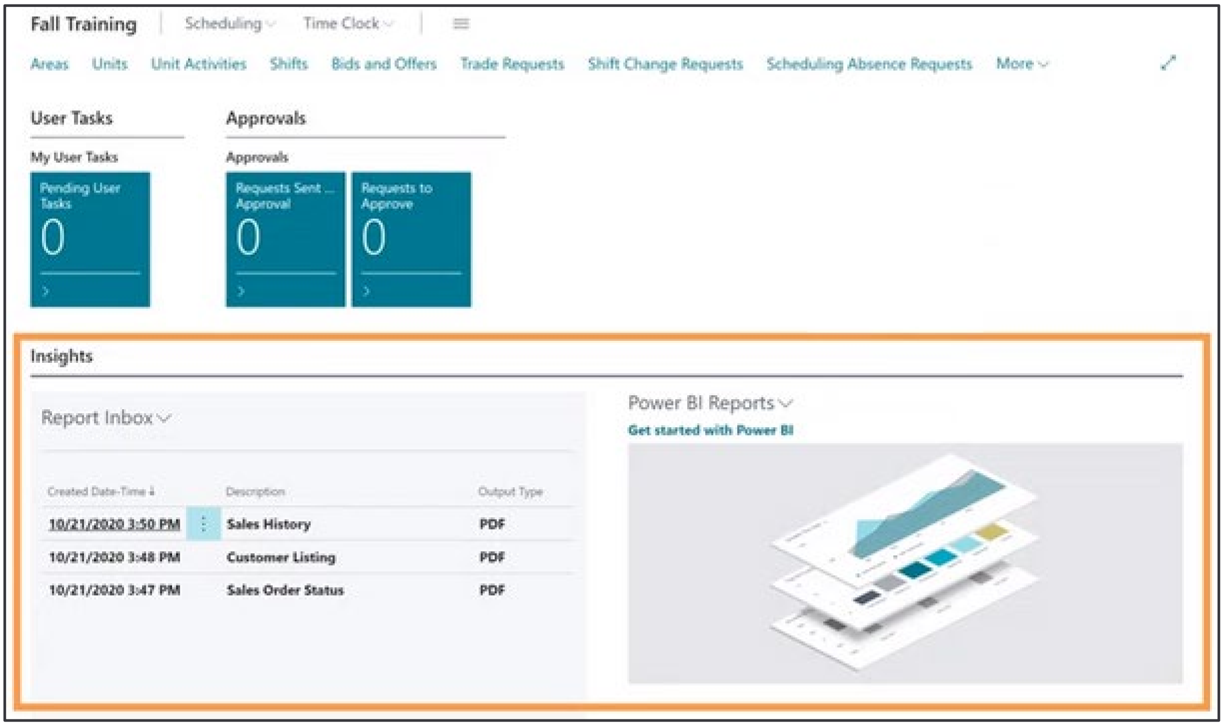
Report Inbox and Power BI Reports parts

In this release, the **Power BI Reports** part is now included in every role center. The **Power BI Reports** part provides the capability for you to view and share Power BI reports within the Sparkrock 365 core product.

The **Report Inbox** part has been added to the following role centers:

- **Accounting Manager**
- **Accounts Payable Coordinator**
- **Accounts Receivable Administrator**
- **Human Resources Manager**
- **Purchasing Agent**
- **Schedule Administrator**

The **Report Inbox** provides the capability for you to view your scheduled reports that are available within the Sparkrock 365 core product.



Performance and stability

Changes have been made to role center cues to improve performance and stability.

Change Password page has been removed from mySparkrock pages

On the **mySparkrock Page Group** page, in the **mySparkrock Pages** part, the **Change Password** page has been removed because the page is no longer valid and if used, causes sessions to fail.

User Setup record is automatically created when a mySparkrock user is added as an alternate

Before this release, when a mySparkrock user was added as an alternate and the user did not exist, the user did not receive notification emails. To resolve this issue, when a mySparkrock user is added as an alternate and the user does not exist, a User Setup record is now automatically created. The User Setup record that is created is based on the user that is linked to the mySparkrock User.

Finance and Procurement

Department Manager role has been renamed to Finance Department Manager

To maintain consistency and clarity, on the **Profiles (Roles)** page, the **Display Name** for the **Profile ID** of *SRF DEPARTMENT MANAGER* has been renamed from *Department Manager* to *Finance Department Manager*.

Application Area Setup pages are no longer accessible from the Tell Me feature for users that have been assigned the Finance Department Manager role

Users that have been assigned the *Finance Department Manager* role can no longer use the Tell Me feature to access the **Application Area Setup** and **User Groups Application Areas Setup** pages.

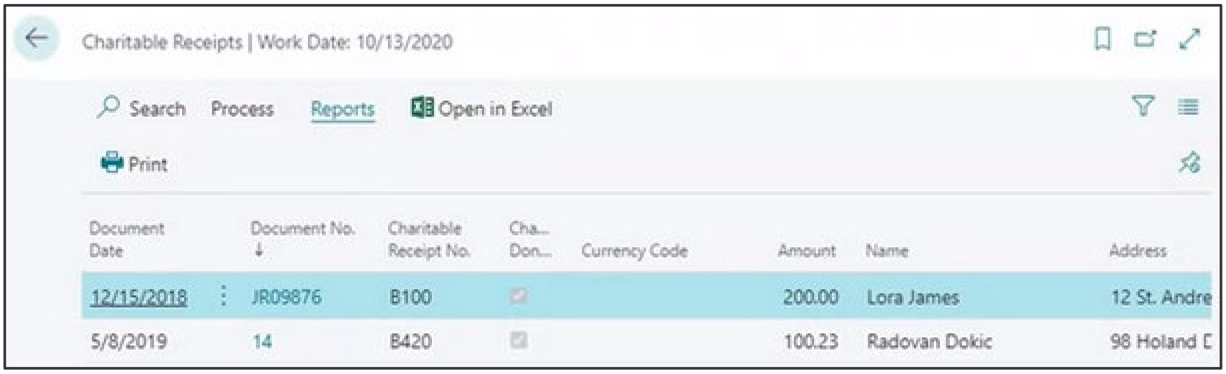
Bank Reconciliation Worksheet Account Set Code filtering

On the **Bank Rec. Worksheet** page, when values have been specified in the **Account Type** and **Account No.** fields for a line, and a lookup is performed for the **Account Set Code** field, the list of Account Set Code records that are displayed is now filtered based on the **Account Type** and **Account No.** values that were specified. This change benefits users because now they only have to select from Account Set Codes where the Account Numbers are either blank or equal to the Posting Group Account Number.

Also, when the **Account No.** field is blank for a line, and an **Account Set Code** is specified, the **Account No.** field is now automatically populated on the line.

Charitable Receipts page

This release introduces a **Charitable Receipts** page which you can use to view a consolidated list of charitable receipts. The **Charitable Receipts** page is accessible through the Tell Me feature. The page displays a consolidated view of posted deposits records that were previously only visible on individual **Posted Deposit** pages, in the **Posted Deposit Subform** part, where the records have the **Charitable Donation** field selected.



Account Set support for Recurring Sales and Purchase Lines

This release introduces the capability to add Account Set Codes on Recurring Sales Lines and Recurring Purchase Lines.

For sales, you must specify on the **Standard Sales Lines Card** page, in the **Account Set Code** field for each line, the Account Set Code that you want to use.

For purchases, you must specify on the **Standard Purchase Code Card** page, in the **Account Set Code** field for each line, the Account Set Code that you want to use.

After you have performed this setup, you can process recurring sales lines and recurring purchase lines as per your normal process.

Changes due to the Use the copy journal function on Posted General Journals and control date for reversing entries in Recurring General Journals feature

In the Microsoft Dynamics Business Central 2020 Wave 2 release, Microsoft introduced a feature that provides the capability for you to use the copy journal function on Posted General Journals and control date for reversing entries in Recurring General Journals. As part of this feature, a **Posted General Journal** page has been introduced. Sparkrock 365 has been updated so that Sparkrock 365 specific fields, such as **Account Set Code** and **Details**, can be used with this feature.

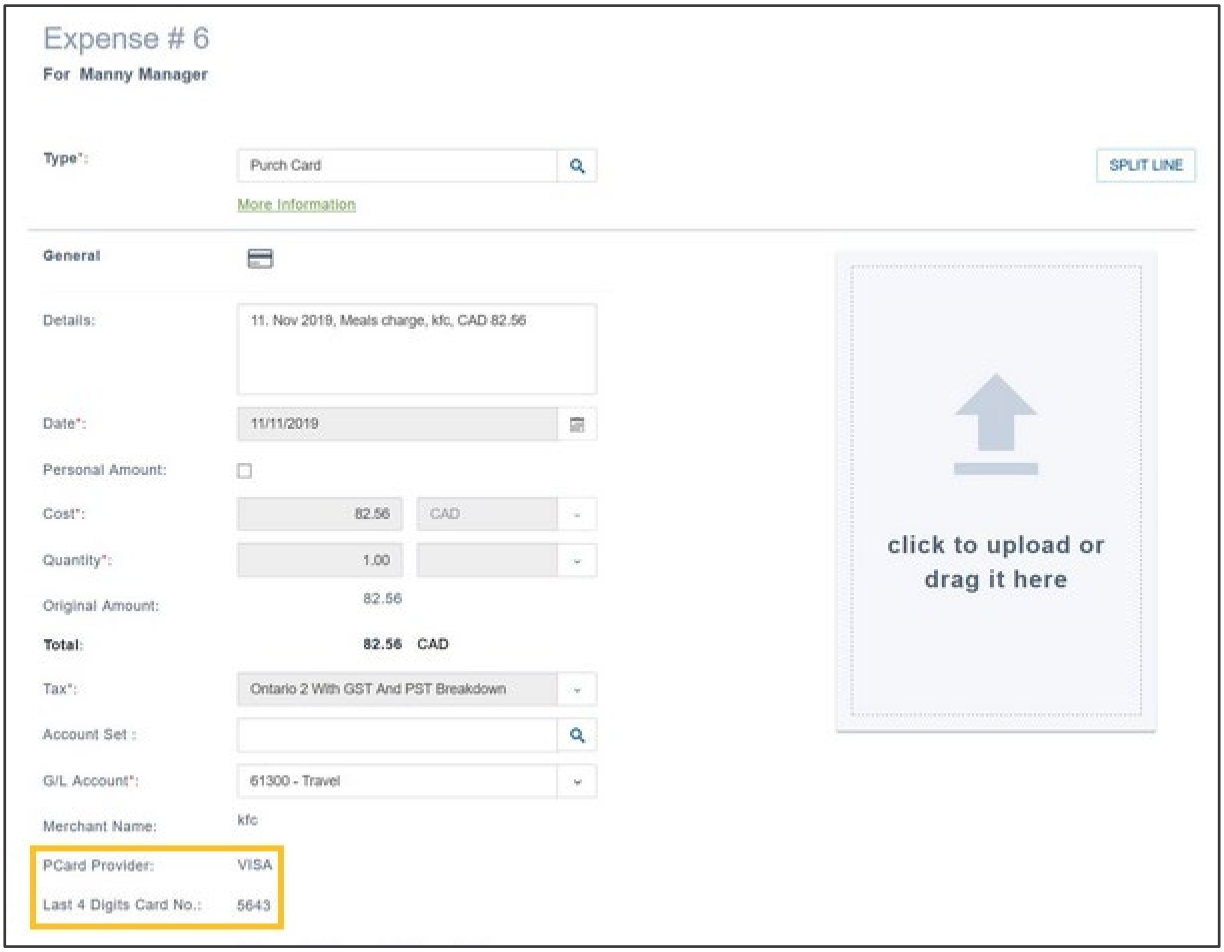
Indicator of required dimensions on a mySparkrock expense line

On mySparkrock, when individual dimensions are required on an expense line, the top of the collapsible **More** section now informs the user how many dimensions are required and how many dimensions have been provided.

This feature is intended to help a user understand the problem when an expense line cannot be saved because a required dimension has not been completed.

PCard Provider and Last 4 Digits Card Number information on expenses and claims

On mySparkrock, for expenses or claims that involve a purchasing card (PCard), a **PCard Provider** and **Last 4 Digits Card No.** fields have been added. These fields provide the capability for you to identify the PCard to which the expense or claim is linked. The **PCard Provider** field displays the **Vendor Name** that is defined on the **Purchasing Cards** page in the core product. The **Last 4 Digits Card No.** field displays the last four digits of the card.



Fixed Asset No. field visibility

On the **Fixed Asset Setup** page, on the **General** FastTab, a **Show Fixed Asset No.** field has been added. When the **Show Fixed Asset No.** field is turned on, on the **Purchase Invoice** and **General Ledger Entries** pages, the **Fixed Asset No.** field is displayed by default. Otherwise, when **Show Fixed Asset No.** is turned off, on the **Purchase Invoice** and **General Ledger Entries** pages, the **Fixed Asset No.** field is hidden by default.

Purchase Orders Comment column

This release introduces the capability to quickly determine whether a purchase order has external or internal comments. To support this feature, on the **Purchase Orders** page, a **Comment** column has been added. When an external or internal comment exists for a purchase order, the corresponding checkbox in the **Comment** column is selected. Otherwise, the checkbox is clear.

Control Budget Check action visibility

This release introduces the capability to specify whether a user that has the *Finance Department Manager* role can view budget checking information.
To support this feature, on the **mySparkrock User Profile Card** page, a **Show Budget Checking** field has been added. When this field is turned on and on the **Budget Checking Setup** page, **Enable Budget Checking** is selected for respective documents, the **Budget Check** action in the core product is available for use for users that have the *Finance Department Manager* role. Otherwise, when this field is turned off, the **Budget Check** action is not displayed for users that have the *Finance Department Manager* role, with one exception. The exception is over-budget approvals when configured for a specified group of users on Limited Access Finance Request pages.

Vendor Categories is available in Tell Me

Starting with this release, you can use the Tell Me feature to search for and open the **Vendor Categories** page.

The Delegation Date Formula field is now hidden by default

On the **Posted Approval Entries** page, the **Delegation Date Formula** field is now hidden by default. If required, to make the field visible again, use the Personalize feature.

HR Management

mySparkrock profile changes with only attachments

On mySparkrock, while editing the **Profile** page, if only an attachment is added, changes are now prevented from being saved.

Notifications for mySparkrock changes

This release introduces new notifications for mySparkrock changes.

Email notifications when a mySparkrock profile change is denied

Starting with this release, email notifications can be sent to a user when a mySparkrock profile change is denied. As part of the email, comments can be included to indicate why the change was denied.

Change request denied.

SE Sparkrock EC
To Mel Clark

Dear Mel Clark,

Change request No. 29 has been denied.

Comment: Invalid address

Field Name	Old Value	New Value
Address	123 Castaway Road	123 Castaway Drive
SRW Preferred First Name	Jake	Jakey

Effective Date notification

On the **My Notifications** page, a *Confirm approval of mySparkrock change after the current date* notification has been added. This notification is enabled by default. This notification is displayed when a mySparkrock change is approved where the effective date is after the current calendar date.

HR Request Worksheet Additional Assignments per Employee

On the **HR Request Worksheet** page, the **Process Type** of *Additional Assignment* can be used for an employee who has more than one assignment. For example, a secondary school teacher who has an additional assignment of guidance teacher or an LTO teacher who has an additional assignment of occasional teacher.

This release enhances the additional assignment feature by adding on the **Load HR Request Worksheet** page, a **Worksheet Lines Create Option** field.

The new **Worksheet Lines Create Option** field is used in conjunction with the existing **Worksheet Lines to Create** field. The **Worksheet Lines to Create** field provides the capability for you to specify how many blank rows to load in the HR Request Worksheet. The **Worksheet Lines to Create** field is useful in a new hire scenario because you can enter the details for each new hire on each line.

The new **Worksheet Lines Create Option** field has the following options:

- *Total Lines*: Specifies that a fixed number of total lines are to be created in the worksheet. After the lines are created, a user must specify the employee number for each line.
- *Lines per Employee:* Specifies the number of lines to create per employee and uses the values in the **Filter: HR Employee Assignment** FastTab to identify the employees to load.

Open the Employee Attendance Plan or Employee Absence list

This release adds on the **EOY Carry Forward worksheet** page, the capability for you to open the **Employee Attendance Plan** or **Employee Absence** list. On the action bar, choose **Related**, and then choose the **Attendance Plan** or **Absences** action.

Ontario English Catholic Teachers Association Worksheet

This release introduces an Ontario English Catholic Teacher's Association (OECTA) Worksheet. The new **OECTA Worksheet** page is available for users that have been assigned the **Human Resources Manager** role.

The following list includes information about how the column amounts are calculated on the **OECTA Worksheet** page:

- **Current Salary**: The amounts in this column are calculated from the Compensation Ledger Entries for the periods that are specified on the **Load OECTA Worksheet** page, on the **Options** FastTab, in the **From HR Pay Cycle Period Starting Date** and **To HR Pay Cycle Period Starting Date** fields.
- **Current Grid**: The amounts in this column are calculated based on the pay grid that is specified on the **HR Employee Assignment Card** page for the employee, on the **Payroll / Compensation** FastTab, in the **Pay Grid Code** field.
- **Fee Fixed Amount**: The amounts in this column are calculated based on the one or more values that are specified on the **HR Integration Setup** page, on the **ON – English Catholic Teachers Association** FastTab, in the **HR Deduction Codes** field.
- **Fee Variable Amount**: The amounts in this column are calculated based on the one or more values that are specified on the **HR Integration Setup** page, on the **ON – English Catholic Teachers Association** FastTab, in the **HR Deduction Codes** field.

Limited Access HR Requests

This release introduces a Limited Access HR Requests feature. This feature allows an HR Department Manager to create and view HR Requests but restricts them from processing the requests. To process HR Requests, a user must have full access.

Setup: Limited Access HR Requests Application Areas

To identify Limited Access HR Requests, on the **Application Area Setup** page, on the **HR Management** FastTab, in the **Limited Access** section, the following fields have been added:

- **Basic HR**: Specifies that the user will have access to the basic human resource specific functionality user interface, including approval related pages. 16673
- **HR Requests**: Specifies that the user will have access to the HR Request specific functionality user interface.
- **Payroll**: Specifies that the user will have access to the payroll specific functionality user interface.
- **Note**: To view payroll data, the user must also have on the **User Setup** page, the **Allow User to Access Compensation Data** field selected.

Setup: Limited Access HR Reason Codes

To identify which HR Reason Codes can be used for the new Limited Access HR Requests feature, on the **HR Reason Codes** page, an **Available for Limited Access** column has been added. On **HR Request** pages, when a user is selecting an HR Reason Code, the list is filtered to only include records where the **Available for Limited Access** field is selected.

Also, the **HR Department Manager** role center page uses the values in the **Available for Limited Access** column to only display HR Request records that are associated with HR Reason Codes that have the **Available for Limited Access** field selected.

Setup: Account Sets

To indicate which Account Sets can be used for the new Limited Access HR Requests feature, on the **Account Sets** page, an **Available on Limited Access HR** column has been added. When a user is selecting an Account Set on the **Details** page for a Limited Access HR Request, in the **Assignment Allocations** part, the list is filtered to only include records where the **Available on Limited Access HR** field is selected.

Setup: User Groups filtering

To provide the capability to filter Employee, Position, and HR Request lists for Limited Access HR Request users, the following columns have been added to the **User Groups** page:

- **Apply Reports to Filter to Employees**
- **Apply Reports to Filter to Positions**
- **Apply Reports to Filter to HR Requests**

This filter functionality applies to all HR Request, Employee, and Position lists that are available for users that have been assigned the *HR Department Manager* role.

Apply Reports to Filter to Employees

When the **Apply Reports to Filter to Employees** checkbox is selected for a user group to which the user is assigned, employee lists that are displayed to the user are filtered to only include their direct reports. Otherwise, when the checkbox is clear, employee lists display all employees.

To determine which employees are displayed in lists from HR Requests, the filter logic uses the **Created By User ID** field of the HR Request. To determine which employee assignments are displayed in lists from HR Requests, the filter logic uses the **Created By User ID** field of the HR Request to filter the list of positions.

Apply Reports to Filter to Positions

When the **Apply Reports to Filter to Positions** checkbox is selected for a user group to which the user is assigned, position lists that are displayed to the user are filtered to only include the positions of their direct reports. Otherwise, when the checkbox is clear, position lists display all positions.

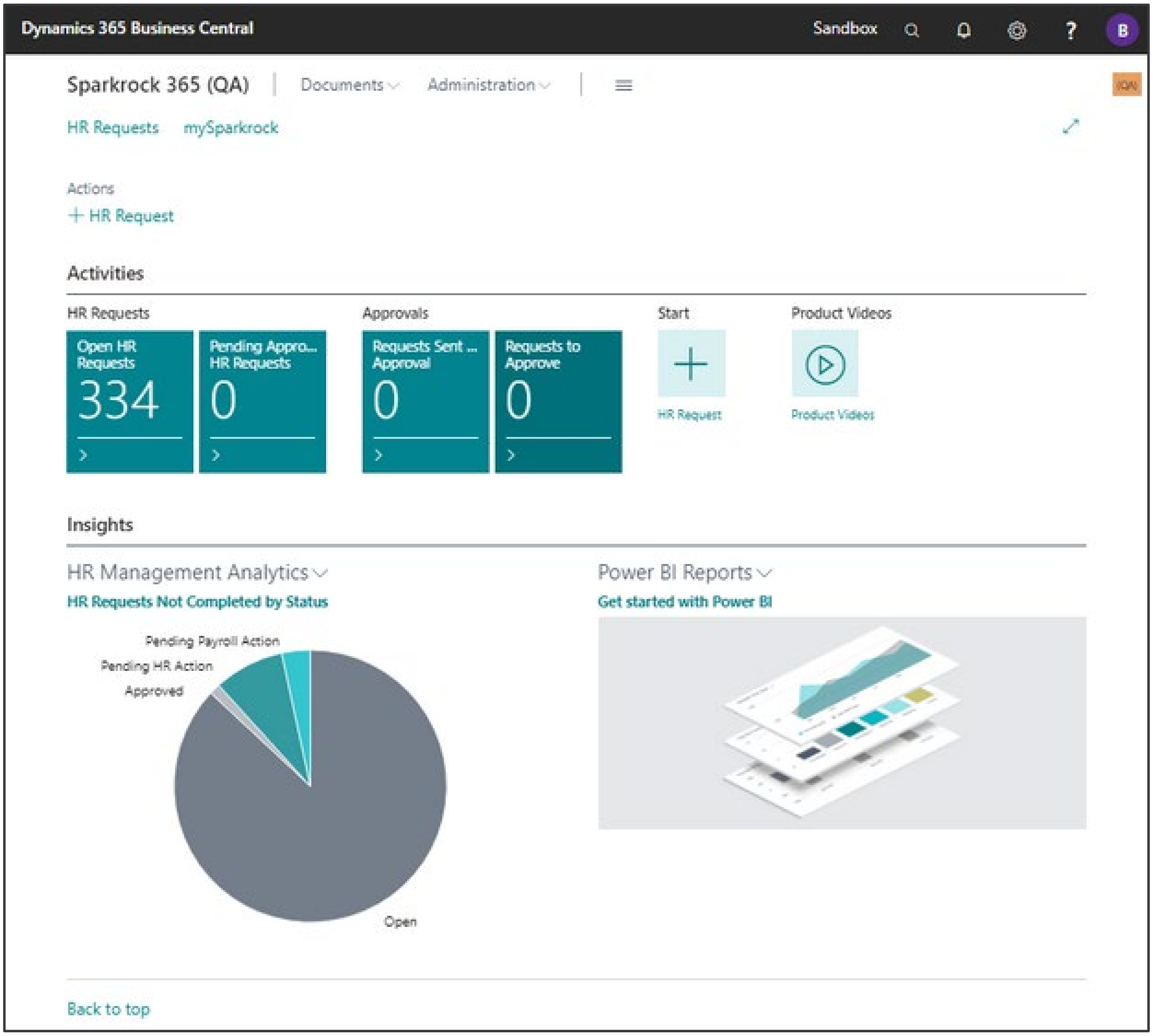
To determine which positions are displayed in lists from HR Requests, the filter logic uses the **Created By User ID** field of the HR Request to filter the list of positions.

Apply Reports to Filter to HR Requests filter

When the **Apply Reports to Filter to HR Requests** checkbox is selected for a user group to which the user is assigned, the HR Request lists that are displayed to the user are filtered to only include HR Requests that the user created or that one or more of their direct reports created. Otherwise, when the checkbox is clear, HR Request lists display all HR Requests. To determine which HR Requests are displayed, the filter logic uses the **Created By User ID** field of the HR Request.

HR Department Manager Role Center

A new **HR Department Manager** role center has been created. This role center is to be used for Limited Access HR Requests.



Limited Access HR Request List page

This release introduces a new **HR Requests** page that displays a list of Limited Access HR Requests. This new page is available for users that have been assigned the *HR Department Manager* role.

To access the **HR Requests** page, choose 🔍, enter *hr requests*, and then choose the related link.

Limited Access HR Request page

This release introduces for Limited Access HR Requests, a new **HR Request** page. This new page is available for users that have been assigned the *HR Department Manager* role.

To access the **HR Request** page, perform the following steps:

1. Choose 🔍, enter *hr requests*, and then choose the related link.
   The **HR Requests** page opens.
2. Select the HR Request for which you want to view the **HR Request** page.
3. On the action bar, choose **Manage** > **View**.
   The **HR Request** page opens.

Limited Access HR Request Next Status and Cancel actions

For Limited Access HR Requests, the following actions are enabled by default:

- **Next Status**
- **Cancel**

However, depending on the setup on the **Workflow** page, of the **Enabled** field, and the **Status** of the HR Request, these actions may be disabled. For more information about whether these actions are enabled or disabled, refer to the following table.

Status of HR Request	**Enabled** field setup	**Next Status** and **Cancel** actions enabled or disabled?
Open	Yes	Disabled
Open	No	Enabled
Pending Approval	Not applicable	Disabled
Approved	Not applicable	Enabled
Pending HR	Not applicable	Disabled
Pending Payroll	Not applicable	Disabled

HR Request - Job Requisition page

The **HR Request - Job Requisition** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields on the **General** FastTab are displayed.

HR Request - New Hire page

The **HR Request - New Hire** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields that are listed on the following FastTabs or parts are displayed:

- **Employee**
- **Assignment**
- **Payroll**
- **Assignment Allocations**
- **Assignment Details** – Provided that the **Show Assignment Detail** field is selected for the HR Reason Code.
- **Assignment Allowances**

HR Request-Additional Assignment page

The **HR Request-Additional Assignment** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields on the following FastTabs or parts are displayed:

- **General**
- **Payroll**
- **Assignment Allocations**
- **Assignment Details** – Provided that the **Show Assignment Detail** field is selected for the HR Reason Code.
- **Assignment Allowances**

HR Request-Transfer page

The **HR Request-Transfer** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields on the following FastTabs or parts are displayed:

- **General**
- **Payroll**
- **Allocations**
- **Assignment Details** – Provided that the **Show Assignment Detail** field is selected for the HR Reason Code.
- **Assignment Allowances**

HR Request-Details Change page

The **HR Request-Details Change** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields on the following FastTabs or parts are displayed:

- **General**
- **Payroll**
- **Assignment Allocations**
- **Assignment Details** – Provided that the **Show Assignment Detail** field is selected for the HR Reason Code.
- **Assignment Allowances**

HR Request-One Time Payment page

The **HR Request-One Time Payment** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields on the following FastTabs or parts are displayed:

- **General**
- **Allocations**

HR Request - Notification page

The **HR Request - Notification** page has been updated so that when the page is accessed from a Limited Access HR request, only the fields on the **General** FastTab are displayed.

HR Request-Assignment End page

The **HR Request-Assignment End** page has been updated so that when the page is accessed from a Limited Access HR request, only the fields on the following FastTabs or parts are displayed:

- **General**
- **Payroll**
- **ROE** – Provided that the **Create ROE** field is selected for the HR Reason Code.
- **Assignment Allowances**

HR Request-Termination page

The **HR Request-Termination** page has been updated so that when the page is accessed for a Limited Access HR request, only the fields on the **General** FastTab are displayed.

HR Request-Leave page

The **HR Request-Leave** page has been updated so that when the page is accessed for a Limited Access HR request, only specific FastTabs and fields are displayed depending on the Type of Leave Request.

On Leave or Change Leave

When the **Type of Leave Request** is equal to *On Leave* or *Change Leave*, only the fields on the following FastTabs or parts are displayed:

- **Leave**
- **Assignment Allowances**

Full Return

When the **Type of Leave Request** is equal to *Full Return*, only the fields on the following FastTabs or parts are displayed:

- **Return from Leave**
- **Assignment Allowances**

Gradual Return

When the **Type of Leave Request** is equal to *Gradual Return*, only the fields on the following FastTabs or parts are displayed:

- **Gradual Return**
- **Assignment Allowances**

Also, when the **Type of Leave Request** is equal to *Gradual Return*, the **HR Emp. Assignment Entry No.** field is displayed.

Change Gradual Return

When the **Type of Leave Request** is equal to *Change Gradual Return*, only the fields on the following FastTabs or parts are displayed:

- **Employee Assignments**
- **Change Gradual Return Details**
- **Assignment Allowances**

Also, when the **Type of Leave Request** is equal to *Change Gradual Return*, the **HR Position Code** field is displayed.

Leave and Return

When the **Type of Leave Request** is equal to *Leave and Return*, only the fields on the following FastTabs or parts are displayed:

- **Leave**
- **Return from Leave**
- **Assignment Allowances**

New Created By User ID field on the and HR Requests and HR Request page

On the **HR Requests** page, a **Created By User ID** field has been added. The same field has also been added on the **HR Request** page, on the **General** FastTab. This field is populated with the user who creates the HR Request.

Created Date/Time field has been moved to the General FastTab

On the **HR Request** page, the **Created Date/Time** field has been moved to the **General** FastTab.

Fields removed from the Advanced HR Setup page External Setup FastTab

The following fields have been removed from the **Advanced HR Setup** page, **External Setup** FastTab:

- **Show All Employees on Hire**
- **New Employee Email Required**
- **HR Request FTE Editable**
- **Lock HR Request Payroll**
- **Lock HR Request Dimensions**

mySparkrock related fields removed from HR Request pages

The following mySparkrock related fields are no longer being used and have been removed:

- **Alternate For External User No.**
- **Alternate For External User Name**

Created By Group removed from HR Request page

On the **HR Request** page, the **Created By Group** section has been removed from the **Audit** FastTab.

Removal of HR Requisitions and HR Requisitions Approvals page from mySparkrock

On mySparkrock, the following pages have been removed from **Manager Self Service**:

- **HR Requisitions**
- **HR Requisitions Approvals**

Removal of fields from mySparkrock pages

Several fields have been removed from mySparkrock pages.

Available on mySparkrock field

On the **HR Reason Codes** page, the **Available on mySparkrock** field has been removed, as HR Requests can only be created and approved in the core product.

Requested by mySparkrock User No. and mySparkrock User Name fields

On the **HR Request** page, the **Requested by mySparkrock User No.** and **mySparkrock User Name** fields have been removed.

HR Requests

On the **User Alternates** page, the **HR Requests** field has been removed.

HR Employee Assignment deleted when New Hire HR Request is reversed

Starting with this release, when a New Hire HR Request is reversed, the related HR Employee Assignment is deleted. Before this release, when a New Hire HR Request was reversed, the HR Employee Assignment was cancelled.

Next Status action is disabled for an Open HR Request when the HR Request Approval Workflow is turned on

Before this release, in a scenario where on the **Workflow** page for an HR Request Approval Workflow, the **Enabled** field was turned on, and a user on the **HR Request** page for a request with the **Status** of *Open*, chose the **Next Status** action, an error was displayed. The error indicated that the status could not be changed because the approval workflow was turned on.

Starting with this release, when this scenario occurs, the **Next Status** action is disabled. Now, to change the **Status** from *Open*, a user must complete the approval process.

mySparkrock Employee and Manager Self Service enhancements

This release includes several enhancements to mySparkrock regarding employee and manager self-service.

User Notification Settings Time Entry support

Starting with this release, you can now disable email notifications for time entry. To disable email notifications for time entry, on the **User Notification Settings** page, search for the *Time Entry* record, and then select the **Block Approval Notifications** check box. When the check box is selected and the user is an approver, the user will not receive core product or mySparkrock time entry related notification emails.

Requested caption changed to Pending Approval

On the **Training & Registration** page, on the **My Training** tab, training sessions that you have requested, but which are not yet approved, now display *Pending Approval* instead of *Requested.* This change was made to make it clear that the training request is not yet approved.

New field on the Training & Registration page

On the **Training & Registration** page, the following fields have been added:

- **Start Time**: Specifies the start time for training. If the training is for multiple days, the start time specifies the start time on each specific date.
- **End Time**: Specifies the end time for training. If the training is for multiple days, the end time specifies the end time on each specific date.
- **Hours Duration**: Specifies the duration of the training for a specific day based on the start and end time.

Note: When these fields are blank in the Sparkrock 365 core product, these fields are not displayed on mySparkrock.

Ontario Teachers' Pension Plan enhancements to report pension adjustment amounts

This release introduces the capability to report Ontario Teachers' Pension Plan (OTPP) pension adjustment amounts.

Create File renamed to Create Contributions File

On the **Ontario Teachers Pension Plan – Payroll Based Reporting** page, the **Create File** action has been renamed to **Create Contribution File**.

Create Pension Adj. File action

On the **Ontario Teachers Pension Plan – Payroll Based Reporting** page, a **Create Pension Adj. File** action has been added. This action can be used to create a file that has the same format as the **OTPP Pension Adjustment** report that is available in Sparkrock 2016.

Report pension adjustment amounts

This release introduces the capability to report pension adjustment amounts. To support this change, the following changes have been made:

- On the **HR Integration Setup** page, on the **ON – Teachers Pension Plan** FastTab, a **Pension Adj. HR Deduction Codes** field has been added. The field accepts one or more HR Deduction Codes.
- On the **Load OTPP Worksheet** page, on the **Options** FastTab, a **TPP HR Deduction Codes** field has been added.
- On the **Ontario Teachers Pension Plan – Payroll Based Reporting** page, **Pension Adjustments Year** and **Pension Adjustments** columns have been added. These fields report the amounts that are associated with the specified HR Deduction Codes for the reporting period.

Ontario Municipal Employees Retirement System enhancements to report pension adjustment amounts

This release introduces the capability to report Ontario Municipal Employees Retirement System (OMERS) pension adjustment amounts. To support this change, the following changes have been made to Sparkrock 365:

- On the **HR Integration Setup** page, on the **ON – OMERS** FastTab, a **Pension Adj. HR Deduction Codes** field has been added. The field accepts one or more HR Deduction Codes.
- On the **Load OMERS Worksheet** page, on the **Options** FastTab, an **OMERS HR Deduction Codes** field has been added.
- On the **OMERS Worksheet** page, the **Pension Adjustment (PA)** column now reports the amounts that are associated with the specified HR Deduction Codes for the reporting period.

Termination HR Request Reversal enhancements

The update of a Termination HR Request is now consistent with the design for other HR Requests, such as Rehire and Additional Assignment. Now, after completing a reversal of a Termination HR Request, the **Status** of the termination employee assignment is *Cancelled*.

HR Request-Leave - Gradual Return page enhancements

To improve data entry, on the **HR Request-Leave - Gradual Return** page, in the **Gradual Return** part, changes have been made to the default column order. Now, the **Leave FTE** and **Leave HR Pay Code** columns appear before the **Active FTE** and **Active HR Pay Code** columns.

New fields on HR Request pages

This release introduces new fields on several HR Request pages.

Load HR Request Worksheet and HR Request Worksheet pages

When the **HR Reason Code** of *Leave Change* is specified, the following new fields are displayed:

- **Work Status While on Leave**
- **Pay Type**
- **Pay Grid Code**
- **Pay Grade**
- **Pay Step Code**
- **Amount**

When the **HR Reason Code** of *Full Return* or *Leave and Return* is specified, the following new fields are displayed:

- **Work Status While on Leave**
- **Pay Type**
- **Pay Grid Code**
- **Pay Grade**
- **Pay Step Code**
- **Amount**
- **Pay Type Upon Return**
- **Pay Grid Upon Return Code**
- **Pay Grade Upon Return**
- **Pay Step Upon Return**
- **Amount Upon Return**
- **Use Most Current Assignment:** This field specifies whether the most current assignment is to be used in cases where the HR Request will result in multiple assignments remaining active. When this field is turned off, Sparkrock 365 behaves the same as before this release. When this field is turned on, the most current assignment is used and any older assignment is closed, so that there is only one active assignment after the HR Request is processed.

HR Request-Leave - Full Return page

On the **HR Request-Leave - Full Return** page, on the **Return from Leave** FastTab, the following new fields are displayed:

- **Pay Type Upon Return**
- **Pay Grid Upon Return Code**
- **Pay Grade Upon Return**
- **Pay Step Upon Return**
- **Amount Upon Return**

HR Request-Leave - Leave and Return page

On the **HR Request-Leave - Leave and Return** page, on the **Return from Leave** FastTab, the following new fields are displayed:

- **Pay Type Upon Return**
- **Pay Grid Upon Return Code**
- **Pay Grade Upon Return**
- **Pay Step Upon Return**
- **Amount Upon Return**
- **Use Most Current Assignment:** This field specifies whether the most current assignment is to be used in cases where the HR Request will result in multiple assignments remaining active. When this field is turned off, Sparkrock 365 behaves the same as before this release. When this field is turned on, the most current assignment is used and any older assignment is closed, so that there is only one active assignment after the HR Request is processed.

New warning on HR Request or Load HR Request Worksheet

On the **HR Request** or **Load HR Request Worksheet** pages, when the **HR Reason Code** of *Leave and Return* is specified and a user enters a **Leave Return Date** for which more than one active assignment exists, a new warning message is displayed. The new warning message informs the user that there are multiple active assignments within the specified dates. The warning also indicates that the **Use Most Current Assignment** field can be turned on, so that the most current assignment is used.

Employee Benefits part standardization on HR Requests

The **Employee Benefits** part on HR Request **Details** pages have been enhanced to work consistently for all HR Reason Codes where the part is available. Starting with this release, the **Employee Card** page is only updated after the HR Request is processed.

The following HR Request **Details** pages have been enhanced to use this design:

- **HR Request-Rehire**
- **HR Request-Additional Assignment**
- **HR Request-Transfer**
- **HR Request-Details Change**
- **HR Request-Leave**
- **HR Request-Termination**

On the **HR Request-Rehire** and **HR Request-Transfer** pages, if current values exist, those values are used, otherwise the default values are updated from the position. On the **HR Request-Additional Assignment**, **HR Request-Details Change**, **HR Request-Leave**, and **HR Request-Termination** pages, the current values are updated.

Note: The **HR Request-New Hire** page was updated to use this design in a previous release.

OTIP HRIS Export enhancements

Several OTIP HRIS Export enhancements are included in this release.

HRIS Exports

On the **HRIS Export File Definitions** page, an **Allow Editing on Export** column has been added. If selected, the user can edit the data in the associated field during the export process. The change will affect the exported data but will not update the main employee data.

For more information, refer to the OTIP HRIS Export Setup and OTIP HRIS Export knowledgebase articles on the Sparkrock Customer Success Center.

Actual Salary calculation changes

On the **OTIP Export** page, changes have been made to the calculations for the **Actual Salary** column. Instead of using on the **Pay Grids** page, the **Annual Salary Adjustment Factor**, the calculation now uses on the **HR Employee Assignment Card** page, the **Pay Type** of *Salary*. Also, the calculation now includes employee assignment allowance amounts, unless these amounts are specifically excluded.

HR Export File Archives action

On the **OTIP Export** page, a **HRIS Export File Archives** action has been added. To view the new **HRIS Export File Archives** action, on the action bar, choose **Related**. The new action provides the capability for you to view the **HRIS Export File Archives** page. When the **HRIS Export File Archives** page opens, a filter is applied, so that only records where the **Export Code** is equal to *OTIP* are displayed.

Exclude employee assignment allowance amounts from the actual salary calculation

On the **HR Position Allowances** page, an **Exclude from Actual Salary** column has been added. This column provides the capability for you to choose whether employee assignment allowance amounts are excluded from the actual salary calculation that is performed when the **OTIP HRIS Export** is run. The values on the **HR Position Allowances** page, in the **Exclude from Actual Salary** column, flow down to the new **Exclude from Actual Salary** column, on the **HR Empl. Assignment Allowances** page.

When the **OTIP HRIS Export** is run, if an employee has earnings from an allowance and the **Exclude from Actual Salary Export** field for the associated allowance record is clear, the earnings are included in the actual salary calculation for the **Actual Salary** field. Otherwise, if the **Exclude from Actual Salary Export** field is selected for the associated allowance record, the employee assignment allowance amounts are excluded from the actual salary calculation.

Previous submission is compared against current employee record and assignment

The **OTIP HRIS Export** now compares the previous submission against the current employee record and assignment to determine when an employee is to be inserted into the OTIP worksheet. Employee assignment allowances are included unless they are specifically marked as excluded.

Remove Change Entry and Employee Benefits related actions and fields

The following obsolete Change Entry and Employee Benefits related actions and fields have been removed from several OTIP specific pages:

- **HRIS Export Change Entries** action
- **Employment Effective Date** field
- **Work Status Effective Date** field
- **Salary Effective Date** field
- **FTE Effective Date** field

HR Request-Transfer

On the **HR Request-Transfer** page, on the **General** FastTab, a **From Work Status** field has been added. The value in the **From Work Status** field is used to update the value on the assignment that is being closed.

Generate ROE field has been removed

On the **Causes of Inactivity** page, the **Generate ROE** check box has been removed. ROE generation is handled by specific HR Reason Codes.

Several fields have been removed from the OTIP Setup page

On the **OTIP Setup** page, the following fields were unused and have been marked obsolete:

- **Default Benefit FTE to 1**
- **Date Implemented**
- **Payroll ID Nos**

Intranet Access field has been renamed to Available on mySparkrock

On the **Employee Miscellaneous Articles** page, the **Intranet Access** field has been renamed to **Available on mySparkrock**.

Date field changes

On mySparkrock, on the **Attendance & Requests**, **Appraisal**, and **Scheduling** pages, changes have been made to the date field so that employees and managers can more easily specify a date and time for requests, appraisals, and scheduling.

Field and column removals

In this release, fields and columns have been removed from several pages.

Employee Associations column

On the **Employee Associations** page, the **No. of Association Entries** column has been removed because the column was redundant.

Pay Type Return

On the **HR Request-Leave** page, the **Pay Type Return** field has been removed.

Payroll Administration

Refresh ROE Details

Starting with this release, after the Record of Employment (ROE) is generated through an HR Request, the ROE details can be refreshed. This feature is helpful in a scenario where the HR Request is processed before the final pay for the employee. To support this feature, on the **Mass Emp. Record of Employment** page, a **Refresh ROE Details** action has been added. This new action can be used to refresh the ROE calculations for insurable earnings.

When the **Refresh ROE Details** action is chosen, Sparkrock 365 recalculates the pay period information before calculating the ROE detail lines. This design accounts for situations where some payroll lines are posted from the time an employee is last paid and the date of termination, after the termination is processed.

Primo Payday updated from 16.9.1 to 17.11

To stay current with the latest Primo updates and fixes, Primo Payday has been updated from 16.9.1 to 17.11. The update includes some recent performance improvements that were recommended by Sparkrock.

Improved performance of US payroll checks and Canadian payroll cheques

Performance of US payroll checks and Canadian payroll cheques has been improved.

Note: As a result of this change, any payroll batch with more than 500 employees requires a custom check layout with the logo and signature embedded.

Increase Pay Code Multiplier to 4 decimal places

On the **HR Pay Codes** page, the **Multiplier** column now accept up to four digits after the decimal point.

Allow Multi-Company Fed./Prov. Withholding Setup field has been hidden

On the **Additional Payroll Setup** page, on the **Canadian Setup** FastTab, the **Allow Multi-Company Fed./Prov. Withholding Setup** field has been hidden by default because this field must not be turned on in this release.

Compensation Journal enhancements

To improve performance and usability, this release introduces several Compensation Journal enhancements.

Compensation Journal Page interface enhancements

Several interface enhancements have been made to the **Compensation Journal** page. The following list includes information about these enhancements:

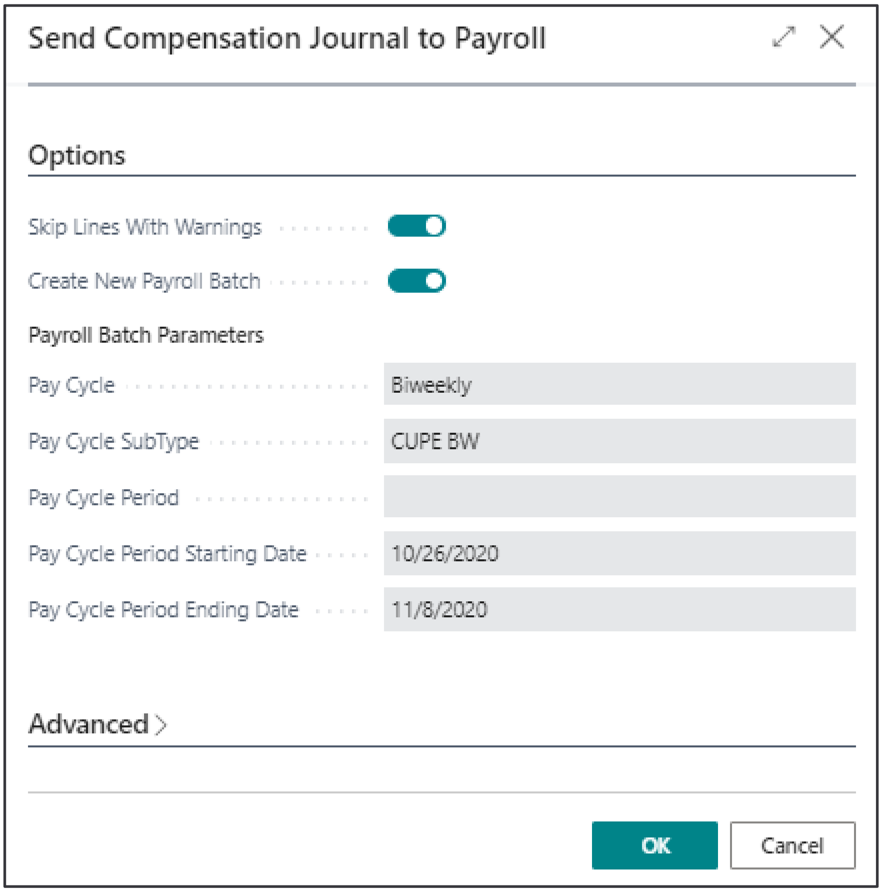
- Actions have been moved to better menu groupings.
- Frequently used actions have been promoted in the menu structure so that the actions can be chosen more quickly.
- Lesser used actions have been demoted in the menu structure to reduce clutter.
- To improve the use of space at the top of the page, the batch details have been moved.
- To improve usability, the default column order has been reorganized.
- On the action bar, under **Related**, a **Batch Payroll Processing** action has been added, which opens the **Batch Payroll Processing List** page.
- An **Errors & Warnings** FactBox has been added. This FactBox displays errors and warnings for the selected journal line. Errors are displayed in red and warnings are displayed in yellow.

- When lines in the current batch have errors or warnings, a new notification is displayed. The notification displays a count of errors and a count of warnings. From the onscreen notification, you can select a link, which opens a page that displays batch errors and warnings. Also, to filter the list of records to only display records that have errors or warnings, you can select a link.

Compensation Journal Send to Payroll action

Starting with this release, when you send the Compensation Journal to payroll, you can now specify whether the payroll batch is to use the same pay cycle parameters that you have set in the Compensation Journal. Also, you can now specify whether to allow lines with warnings only to be skipped from being sent to payroll.

To support this feature, on the **Compensation Journal** page, on the action bar, under **Payroll**, a **Send to Payroll** action has been added. When this action is chosen, the **Send Compensation Journal to Payroll** page is displayed.



Skip Lines with Warnings field

When **Skip Lines with Warnings** is turned on, lines with only warnings are skipped from being sent to payroll. Otherwise, when **Skip Lines with Warnings** is turned off the lines are sent.

Note: Lines with errors continue to be skipped as per previous Sparkrock 365 releases.

Create New Payroll Batch field

When **Create New Payroll Batch** is turned on, after lines have been sent to payroll, a payroll batch is created. When the payroll batch is created, the following Payroll Batch Parameters are defaulted based on the parameters that have been set in the Compensation Journal:

- **Pay Cycle**
- **Pay Cycle SubType**
- **Pay Cycle Period**
- **Pay Cycle Period Starting Date**
- **Pay Cycle Period Ending Date**

Otherwise, when **Create New Payroll Batch** is turned off, a payroll batch is not created.

New Compensation Journal validations

On the **Compensation Journal** page, when the **Load Lines** action is chosen and the Compensation Journal Load process is completed, new validations are performed. These validations prevent errors from occurring later during payroll processing.

Birth date validation

The existing birth date validation has been changed so that a missing birth date is reported as an error instead of a warning.

Social Insurance No. or Social Security No. validations

A Social Insurance Number and Social Security Number validation has been added. This new validation considers the value on the **Company Information** page, on the **General** FastTab, in the **Localization** field as follows:

- If the **Localization** field is set to *Canada* and the **Social Insurance No.** field on the **Employee Card** page for the employee is blank, an error is reported.
- If the **Localization** field is set to *US* and the **Social Security No.** field on the **Employee Card** page for the employee is blank, an error is reported.
- If the **Localization** field is set to *Other*, an error is not reported.

Address validations

Address validations have been added. If on the **Employee Card** page, the **Address**, **City**, or **Post Code** fields are blank, errors are now reported.

Note: A validation for the **State/Province** field was added in a previous release.

Document No. cannot be changed for a processed compensation journal line

On the **Compensation Journal** page, when the **Payroll Status** of a compensation journal line is equal to *Processed*, the **Document No.** field can no longer be changed. If you try to change the value in the **Document No.** field, the following error is displayed:

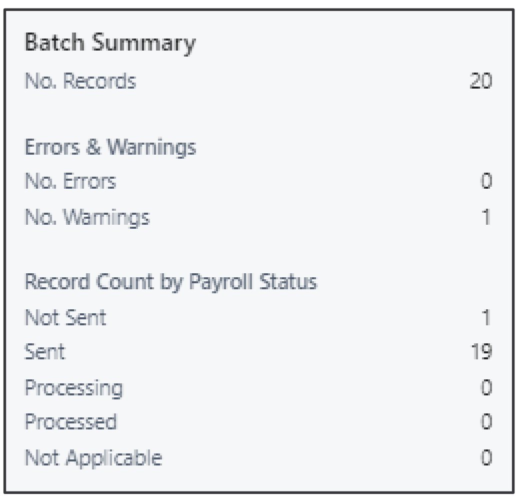
Document No. cannot be changed when Payroll Status is Processed.

Compensation Journal Batches page enhancements

Several enhancements have been made to the **Compensation Journal Batches** page.

Batch Summary FactBox

On the **Compensation Journal Batches** page, a **Batch Summary** FactBox has been added.



Reason Code column is hidden by default

On the **Compensation Journal Batches** page, the **Reason Code** column is now hidden by default.

No. of Records field has been removed

On the **Compensation Journal Batches** page, the **No. of Records** field has been removed.

Clear Batch field is turned off by default

In this release, on the **Compensation Journal Load** page, on the **Options** FastTab, when the **Action if Employee is Already Loaded** field is set to *Skip Employee*, the **Clear Batch** field is automatically turned off. This change was made because it does not make sense to clear the batch when the employees that are already in the batch are being skipped.

Compensation Journal no salary warning

When loading the compensation journal and only allowance lines are created, a new warning is displayed. The new warning notifies the user that only allowance lines are created for the employee and that there are no regular earnings lines.
For example:
Only allowance lines are created for employee 'E0090' Jeremy Faster with no regular earnings lines.
This warning is for informational purposes only. The lines can still be processed.

Progression by Selected Hours Quantity

This release introduces changes to the progression method of quantity threshold calculation that is performed when the **Load Lines** action is chosen on the **Progression Worksheet** page. Now, specific pay codes can be excluded from the calculation.
Also, to determine when the quantity has been met, better filtering has been added to the compensation ledger entries.

Exclude from Progression

On the **HR Pay Codes** page, an **Exclude from Progression** column has been added. This column provides the capability to exclude hours or days that are associated with the pay code from progression calculations that are quantity based.

Compensation Ledger Entries filtering

The start date filtering for compensation ledger entries differs depending on whether the **Progression Date** field for an employee assignment is blank. For a new employee, the **Progression Date** field for an employee assignment is blank because the **Progression Date** is not specified until the employee moves to the next pay grid amount. An employee moves to the next pay grid amount when the employee meets the value on the **Progression Methods** page, in the **Progression Qty.** field of the progression unit that is specified.

For employee assignments where the **Progression Date** is blank, Sparkrock 365 now uses the **Assignment Start Date** that appears on the **HR Employee Assignments** page for the employee assignment as the start date filter. For employee assignments where the **Progression Date** is not blank, Sparkrock 365 filters the entries using the employee assignment **Progression Date** as the start date.

To determine the end date filter, the **Effective Date** that is specified on the **Load Progression Worksheet** page is used.

Also, the compensation ledger entries filter now only includes records where on the **HR Pay Codes** page, the **Exclude from Progression** field is clear.

Determining whether an employee has met the progression threshold

To determine whether an employee has met the progression threshold, Sparkrock 365 now determines the total units between the start date and end date. If the employee has met the threshold, either by the progression method progression quantity or the employee assignment progression quantity, a line is created for the employee on the **Progression Worksheet** page.

When the employee has a line created on the **Progression Worksheet** page and the quantity threshold is being used, the **Progression Date** field value is set to the **Effective Date** that was specified on the **Load Progression Worksheet** page.

Scheduling and Time Entry

French-Canadian support for Scheduling HTML templates

To support the French-Canadian language for Scheduling, hardcoded labels in the Scheduling HTML templates have been removed.

If you want to support Scheduling in French-Canadian, on the **Schedule Setup** page, on the **Schedule Email Setup** FastTab, upload the updated Scheduling HTML templates in the corresponding template fields. The updated templates are available for download from the Configuring Schedule Setup knowledgebase article, which is available on the Sparkrock Customer Success Center.

Training Management integration to Employee Scheduling

In this release, the integration between training management and employee scheduling has been enhanced. Sparkrock 365 no longer uses the *UNAVAILABLE* schedule unit for this integration. A new design has been developed, which updates the schedule and the new training schedule unit.

New Training Unit toggle field

On the **Schedule Unit Card** page, on the **General** FastTab, a **Training Unit** toggle field has been added. Only one Schedule Unit Card per company can have the **Training Unit** field turned on.

Training Activity column has been removed from the Schedule Unit Activities page

Now that there is a dedicated training schedule unit, the **Training Activity** column on the **Schedule Unit Activities** page is no longer required and has been removed.

Exclude TRAINING units from Mass Update Schedule Shifts

On the **Schedule Card** page, when performing **Mass Updates** for **Replace** or **Vacate**, the training unit is excluded. Excluding the training unit prevents users from performing a mass update of information on this unit by mistake.

Training Unit Activities

This release adds on the **Training Registration** page, a **Training Activities** part. Training Unit Activities are used to integrate Training Management with Scheduling. One or more activities from the training unit can be configured per daily training session. This feature supports assignment of different pay codes for salary and hourly employees with start and end times.

The **Training Activities** part includes the following columns:

- **Pay Type**: Allowable options are: *All*, *Salary*, and *Hourly*. This field specifies the pay type of the assignment to which the training activity is to be applied. If an employee has an assignment with the **Pay Type** of *Salary*, the activity that is linked to this pay type is applied when a training shift is created.
- **Activity Code**: Specifies the training unit activity code that is applicable for this training.
- **Activity Description**: Specifies the activity code description.
- **Start Time**: Specifies the start time of the activity that will be added to the training shift. The default value is the start time of the training.
- **End Time**: Specifies the end time of the activity that will be added to the training shift. The default value is the end time of the training.

Update Schedule

As a training admin, when you choose the **Update Schedule** action, the schedules for employees who have been assigned training are updated with the training information. The logic that is used to update the schedules for training is described in the following sections.

Creating a training shift

When creating a training shift, depending on whether there is overlap with an existing shift, one of the following actions is performed:

- If there is overlap, the assignment from that shift is used.
- If there is no overlap, the assignment that has on the **HR Employee Assignment Card** page, on the **Details** FastTab, **Eligible for Scheduling** turned on and has the highest **Schedule Selection Priority** is used.

Note: If an employee does not have an assignment that is eligible for scheduling, the schedule for the employee is not updated.

Creating a shift

When creating shifts, the default settings for activities are specified as indicated in the following list:

- **Training Registration - Pay Type** is set to *All* for the training.
- **Training Registration - Pay Type** is set to *Salary* when the assignment is salary.
- **Training Registration - Pay Type** is set to *Hourly* when the assignment is hourly.

If Training Registration is not configured, the default training activity is used. If Training Registration is not configured and the default training activity is not configured, an error is generated.

Updating schedule logic when there is a training line

The **Update Schedule** action logic for training is initiated when there is a training line, and the following conditions are met:

- **Status** is equal to *Registered*.
- The training line is not already linked to a schedule.
- The employee on the line has at least one assignment where on the **HR Employee Assignment Card** page, on the **Details** FastTab, **Eligible for Scheduling** turned on.
- One or more eligible assignments for the employee are active and the employee is not on leave for the dates that are specified in the daily schedule.
- The Daily Schedule has at least one line with a **Date** and a **Start Time** and **End Time**. This criterion is required to ensure that the Daily Schedule is configured.

Lunch break

When the training shift is above the **Lunch Deduction Threshold** that is defined on the **Schedule Unit Card** page, and the employee is configured on the training unit with a lunch break, the lunch break is accounted for in the duration of the activity. Otherwise, the lunch break is not considered.

Vacant shift

The vacant shift that is created because of the integration has the position of the employee assignment from the original shift and the activities from the original shift.

Scenarios

The following table includes some example scenarios to illustrate how schedules are updated when the **Update Schedule** action is chosen for employees who have been assigned training.

<table>
<tr><th>Scenario</th><th>Times</th><th>Update Schedule Action Processing</th></tr>
<tr>
<td>Training does not match an existing shift.</td>
<td>
<table>
<tr><th>Training: Daily Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Day 1</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><th>Update Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Training Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
</table>
</td>
<td>When the Update Schedule action is chosen, the following tasks are performed:

A shift in the training unit is created.
The shifts are linked to the training line and the shift is marked as training.
The training activities for the unit are added as activities for the shift.
The Status of the shift is changed to Approved.

</td>
</tr>
<tr>
<td>Training matches an existing shift, for example, the training date, start and end times match.</td>
<td>
<table>
<tr><th>Training: Daily Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Day 1</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><th>Shift</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Day 1</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><th>Update Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Training Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Vacant Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
</table>
</td>
<td>When the Update Schedule action is chosen, the following tasks are performed:

The shift is copied, and a vacant shift is created that is linked to the training line. The position and activities are copied from the original shift. The vacant shift is in the unit of the original shift.
The shift for the employee is made a training shift for the duration between the start and end time. The Status is set to Approved. The activities are the training activities. The shift is linked to the training line.
If extended start or end times are configured, shifts are created in the unavailable units to block the rest of the time that the employee will be unavailable.
Notifications are sent to the supervisors of the original shift unit.

</td>
</tr>
</table>

<table>
<tr><th>Scenario</th><th>Times</th><th>Update Schedule Action Processing</th></tr>
<tr>
<td>Training is shorter than the start and end time of the shift.</td>
<td>
<table>
<tr><th>Training: Daily Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Day 1</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Shift</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Day 1</td><td>8:00 AM</td><td>4:00 PM</td></tr>
<tr><td>Update Schedule</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Training Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Vacant Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Original shift Split</td><td>8:00 AM</td><td>9:00 AM</td></tr>
<tr><td>Original shift Split</td><td>3:00 PM</td><td>4:00 PM</td></tr>
</table>
</td>
<td>When the Update Schedule action is chosen, the following tasks are performed:

The shift is split for the parts that are outside the training start time, end time, or both.
The shift that matches the training is copied and a vacant shift is created that is linked to the training line. The position and activities are copied from the original shift.
The shift for the employee is made a training shift. The Status is set to Approved. The activities are the training activities. The shift is linked to the training line.
Notifications are sent to the supervisors of the original shift unit.

</td>
</tr>
<tr>
<td>Training is longer than the start and end time of the shift.</td>
<td>
<table>
<tr><th>Training: Daily Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Day 1</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Shift</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Day 1</td><td>11:00 AM</td><td>1:00 PM</td></tr>
<tr><td>Update Schedule</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Training Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Vacant Shift</td><td>11:00 AM</td><td>1:00 PM</td></tr>
</table>
</td>
<td>When the Update Schedule action is chosen, the following tasks are performed:

The shift that matches the training is copied and a vacant shift is created that is linked to the training line. The position and activities are copied from the original shift.
The shift for the employee is made a training shift. The start and end time are changed to match the one of the training. The Status is set to Approved. The activities are the training activities. The shift is linked to the training line.
Notifications are sent to the supervisors of the original shift unit.

</td>
</tr>
</table>

<table>
<tr><th>Scenario</th><th>Times</th><th>Update Schedule Action Processing</th></tr>
<tr>
<td>There is an overlap between the training and the shift where the training partially overlaps the end of a shift. The rest of the shift must be scheduled. In other words, the shift starts before the training and ends before the training.</td>
<td>
<table>
<tr><th>Training: Daily Schedule</th><th>Start Time</th><th>End Time</th></tr>
<tr><td>Day 1</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Shift</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Day 1</td><td>7:00 AM</td><td>2:30 PM</td></tr>
<tr><td>Update Schedule</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Training Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Vacant Shift</td><td>9:00 AM</td><td>2:30 PM</td></tr>
<tr><td>Original shift Split</td><td>7:00 AM</td><td>9:00 AM</td></tr>
</table>
</td>
<td>When the Update Schedule action is chosen, the following tasks are performed:

The shift is split on the point of overlap.
The shift that is within the training time is copied and a vacant shift that is linked to the training line is created. The position and activities are copied from the original shift.
The shift for the employee is made a training shift. The start and end times are changed to match the training times. The Status is set to Approved. The activities are the training activities. The shift is linked to the training line.
Notifications are sent to the supervisors of the original shift unit.

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<tr><td>Day 1</td><td>10:00 AM</td><td>5:00 PM</td></tr>
<tr><td>Update Schedule</td><td>Start Time</td><td>End Time</td></tr>
<tr><td>Training Shift</td><td>9:00 AM</td><td>3:00 PM</td></tr>
<tr><td>Vacant Shift</td><td>10:00 AM</td><td>3:00 PM</td></tr>
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<td>When the Update Schedule action is chosen, the following tasks are performed:

The shift is split on the point of overlap.
The shift that is within the training time is copied and a vacant shift that is linked to the training line is created. The position and activities are copied from the original shift.
The shift for the employee is made a training shift. The start and end times are changed to match the training times. The Status is set to Approved. The activities are the training activities. The shift is linked to the training line.
Notifications are sent to the supervisors of the original shift unit.

</td>
</tr>
</table>

In all scenarios, where an existing shift is converted to a training shift, when the **Update Schedule** action is chosen, the following tasks are performed:

- Open Trade Requests, Change Requests, and Requests for Absence are cancelled.
- On a Clock in or Clock out, an error is generated.
- On an Absence Shift, an error is generated.

Schedule Templates and Training Shifts

When you apply a template to a schedule and training shifts overlap with the schedule that is created from the templates, Sparkrock 365 behaves the same as when schedules are updated using the **Update Schedule** action. For more information about the **Update Schedule** action behavior, see Update Schedule. Typically, this situation occurs when the training is scheduled well in advance of the schedule and the template is applied after the training shifts have been added.

If the shift **Status** is different than *Transferred* or *Posted*, the assignment on the training shift must be updated to match the one of the shifts that are being created.

If the training shift has a **Status** of *Transferred* or *Posted* or has a Clock In or Clock Out and has a shift coming from the template that has any overlap, an error is generated.

Changing or removing training

If you have the *Schedule Administrator* role, you may have to perform the following tasks:

- Delete training
- Change the **Status** on a training line
- Delete a training line

When these tasks are performed, depending on the scenario, shifts are affected in different ways. The following list describes the various scenarios that are possible:

- A linked shift can be *Vacant* or *Filled In*.
- A *Filled In* shift can be *Posted*, *In Posting*, or *Unposted*.
- An Unposted shift can be Clocked In or Clocked Out or not linked to the Time Clock.
- Split Shifts.
- A shift can have different statuses.

The following table illustrates how single training shifts are affected when training is changed or removed for all these various scenarios.

Scenario Number	Shift Status	Linked Shift	Training Line Action	Result on Shifts
1	The **Status** is equal to *Transferred* or *Posted.*	Not applicable.	Delete Line or Delete Training Record.	Sparkrock 365 does not make any changes to shifts. Changes to shifts are only performed when the shift does not have the status of *Transferred* or *Posted*. The following message is displayed: *This training is linked to at least one shift that is processed through Payroll. Deletion will not impact the linked shifts. Do you want to proceed?*
2	The **Status** is equal to *Transferred* or *Posted.*	Not applicable.	Change Line **Status** is equal to *New*, *Pending*, or *Not Applicable.*	Sparkrock 365 prevents this action. The following message is displayed: *You cannot change the status. You have to delete the line to remove the associated shift for the employee.*

Scenario Number	Shift Status	Linked Shift	Training Line Action	Result on Shifts
3	The **Status** is not equal to *Transferred* or *Posted*.	Vacant/Type is equal to *Position.*	Delete Line, Delete Training Record, or Change Line **Status** is equal to *New*, *Pending*, or *Not Applicable.*	Sparkrock 365 performs the following actions: 1. Open Offers and Bids are cancelled. Emails are sent for the cancellation. 2. The vacant shift in the same unit is copied. The original employee is assigned back. The activities from the vacant shift are copied. 3. The vacant shift is deleted. 4. The training shift is deleted. 5. References to training lines are removed. **Note**: Splitting vacant shifts breaks the reference to the training line.
4	The **Status** is not equal to *Transferred* or *Posted*.	Not applicable.	Delete Line, Delete Training Record, or Change Line **Status** is equal to *New*, *Pending*, or *Not Applicable.*	Splitting the vacant shift in mySparkrock or the core product removes the reference to the training lines on all shifts resulting from the split. A warning is displayed that indicates the link is broken and the user asked whether they want to proceed. When a linked shift is split, the link of the resulting shifts to the training line are broken. Sparkrock 365 performs the following actions because the link to the vacant or linked shift and the information about the unit and the activities on the shift are no longer available: 1. Deletes the training shift. 2. Removes the references to the shift from the training line.

Scenario Number	Shift Status	Linked Shift	Training Line Action	Result on Shifts
5	The **Status** is not equal to *Transferred* or *Posted*.	Filled In. No Clock In or Clock Out.	Delete Line or Delete Training Record.	Sparkrock 365 performs the following actions: 1. Deletes the training shift. 2. Depending on the selected action, Sparkrock 365 performs one of the following actions: • If the selected action is equal to *Restore Original Employee*, replaces the employee on the one or more filled in shifts with the employee and assignment from the one or more training shifts, and then performs the following tasks: ▫ Sends an email to the replaced employee and the supervisor. ▫ For pending trades, cancels and emails the requester or if approved by the recipient, the requester, recipient, and supervisor. ▫ For pending change requests, cancels and emails the employee and the supervisor. ▫ For pending requests for absence, cancels and emails the employee and the supervisor. • If the selected action is equal to *Keep existing employee*, proceeds to the next step. 3. When the training is in the past, in other words, the start date is less than today's date, the replace existing employee option is ignored and the keep existing employee option is used instead. 4. Removes references to the training from the one or more filled in shifts and removes references to the shifts from the training lines.
6	The **Status** is not equal to *Transferred* or *Posted*.	Filled In. No Clock In or Clock Out.	Change Line **Status** is equal to *New*, *Pending*, or *Not Applicable.*	Sparkrock 365 prevent this action. The following message is displayed: *You cannot change the status. You have to delete the line to remove the associated shift for the employee.*
7	The **Status** is not equal to *Transferred* or *Posted*.	Filled In. Clock In or Clock Out.	Delete Line or Delete Training Record.	Sparkrock 365 performs the following actions: 1. Deletes the training shift. 2. Removes references to the training in the one or more filled in shifts. 3. Removes references to the shift on the training lines.

Scenario Number	Shift Status	Linked Shift	Training Line Action	Result on Shifts
8	The **Status** is not equal to *Transferred* or *Posted*.	Filled In. Clock In or Clock Out.	Change Line **Status** is equal to *New*, *Pending*, or *Not Applicable.*	Sparkrock 365 prevent this action. The following message is displayed: *You cannot change the status. You have to delete the line to remove the associated shift for the employee.*

Training can span multiple days, pay cycles, or both and the training shifts and their linked shifts can have several statuses. The following list describes the various scenarios that are possible:

- Absent Shift Modes can have the **Status** of *Approved*, *Transferred*, or *Posted*.
- Linked Shift Modes may not exist, can be vacant when the type is equal to *Position* or *Filled In*.
- When the Linked Shift Modes are *Filled In*, the shifts can be *Posted*, *In Posting*, or *Unposted*.
- An Unposted shift can be Clocked In or Clocked Out or not linked to the Time Clock.

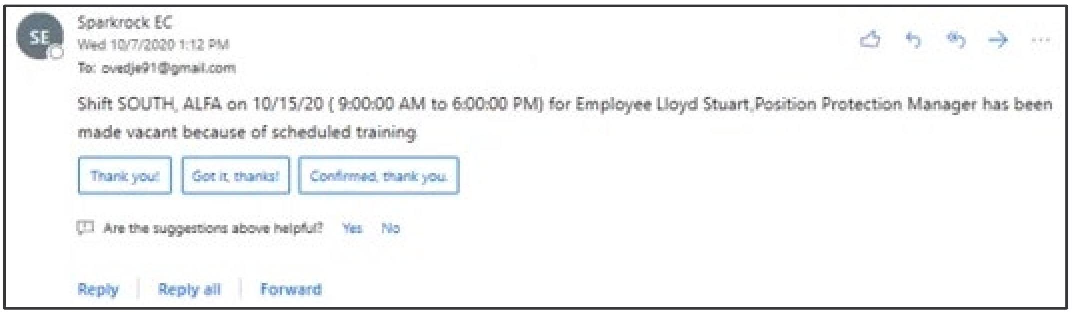
The following table illustrates the actions Sparkrock 365 performs for these various scenarios.

Scenario Number	Training Shifts Status	Linked Shifts Status	Action
1	At least one *Transferred* or *Posted*	Not applicable.	Training cannot be deleted. A training line cannot have the status changed or the line deleted.
2	All *Approved*	At least one *Transferred* or *Posted*.	Training cannot be deleted. A training line cannot have the status changed or the line deleted.

Scenario Number	Training Shifts Status	Linked Shifts Status	Action
3	All *Approved*	All vacant.	Sparkrock 365 performs the following actions as per scenario 3 in the previous table: 1. Open Offers and Bids are cancelled. Emails are sent for the cancellation. 2. The vacant shift in the same unit is copied. The original employee is assigned back. The activities form the vacant shift are copied. 3. The vacant shift is deleted. 4. The training shift is deleted. 5. References to training lines are removed. **Note**: Splitting vacant shifts breaks the reference to the training line.
4	All *Approved*	Some vacant, some filled in with no time clocked or no linked shifts.	Depending on where the linked shift is, Sparkrock 365 performs the action as per the scenarios in the previous table.
5	All *Approved*	At least one Filled In with Clock In or Clock Out.	Training cannot be deleted. A training line cannot have the status changed or the line deleted.

Sending notifications to the supervisor

When a shift that is scheduled has been made vacant because training replaced the shift or the training overlaps the shift, a notification is sent to the supervisor. For more information about when these notifications are sent, see Scenarios.



Identifying which training a training shift refers to

To help identify which training a training shift refers to, on the **Shift Card** page, on the **General** FastTab, in the **Comment** field, you can view the training description.

Hide training unit when creating a shift

On mySparkrock, on the **My Schedule** page, when creating a shift, employees are not allowed to select in the **Schedule Unit** field, the new training schedule unit.

New fields on the Training Registrations and Training Registration pages

On the **Training Registrations** and **Training Registration** page, the following optional fields have been added:

- **Start Time**: Specifies the start time for training. If the training is for multiple days, the start time specifies the start time on each specific date.
- **End Time**: Specifies the end time for training. If the training is for multiple days, the end time specifies the end time on each specific date.
- **Hours Duration**: Specifies the duration of the training for a specific day based on the start and end time. The **Hours Duration** field can be manually entered or is automatically calculated based on the Start and End Times when both times are defined.

When these new fields are populated or changed for a Training Registration with the **Status** of *Open*, these fields are populated or changed on the Daily Schedule. Also, on the **Training Registration** page, when the **Create Daily Schedule** action is chosen and the **Start Time** and **End Time** fields are populated, the new **Start Time**, **End Time**, and **Hours Duration** fields are updated.

Editing a training shift

Users that have the *Schedule Administrator* role, can perform the following tasks:

- Reopen a training shift
- Edit activities
- Edit assignments

Users that have the *Schedule Administrator* role, cannot perform the following tasks:

- Split a training shift
- Copy a training shift
- Edit the Start and End Times
- Change the employee

Length and Unit of Measure fields have been removed

The **Length** and **Unit of Measure** fields have been removed from the **Training Registrations** and **Training Registration** pages. The **Length** field has been replaced by the new **Hours Duration** field. The **Unit of Measure** field is now obsolete.

Training unit on upgrade

When you upgrade to the Sparkrock 365 Fall 2020 release, a Schedule Unit for training is created. This new training unit is dedicated to training and is intended to hold training activities and blocking shifts. The new training unit is where all training can be scheduled through the integration to Training Registration or manually.

If multiple Area Codes are in use, an Area Code named *TRAINING* is created to hold the new training Schedule Unit. If only one Area Code is in use, the training Schedule Unit is linked to that Area Code.

The new training Schedule Unit serves all areas. An area must be configured for training specifically so that the area can be assigned to the training Schedule Unit.

View a list of assigned shifts

When making an absence request on mySparkrock, this release adds the capability for an employee to view a list of their assigned shifts that are to be impacted by the request.

mySparkrock Scheduling enhancements

This release includes the following enhancements for the mySparkrock Scheduling feature.

Cause of Absence processing enhancements

To enable better control and to make the Scheduling behavior consistent with Absence Management, the following enhancements have been introduced:

- On the **Employee Attendance Plan** page, on the **Employee Attendance Plan Lines**, when a Cause of Absence record has the **Create Entries – Employee** field selected, the employee can now request an absence with this Cause of Absence.
- On the **Employee Attendance Plan** page, on the **Employee Attendance Plan Lines**, when a Cause of Absence record has the **Create Entries – Manager** field selected, the supervisor can now make a shift vacant with this Cause of Absence.
- When a supervisor is approving an absence, the list of Cause of Absences that are displayed is filtered to only show records where on the **Employee Attendance Plan** page, on the **Employee Attendance Plan Lines**, the **Create Entries – Employee** field is selected.

Schedule Unit Employee Card fields renamed

In the core product, the following employee contact information fields have been renamed to match the respective field captions on the employee card:

- **Employee Home No.** has been renamed to **Direct Phone No.**
- **Employee Mobile No.** has been renamed to **Private Phone No.**
- **Employee E-Mail** has been renamed to **Company E-mail**

On mySparkrock, these changes are reflected on the **Employees**, **Schedule Unit Employee Card, Shift Card**, and **Shift Details** pages, in the **CONTACT INFO** section.

mySparkrock Time Entry enhancements

This release includes the following enhancements for the mySparkrock Time Entry feature.

Flexible Week Start

Time entry pages on mySparkrock now display the correct week start day that is specified within the core product, on the **Advance HR Setup** page, on the **General** FastTab, in the **Week Start** field.

Total columns on timesheets pages display 2 decimal places

On timesheet pages, the **Total** columns now display 2 decimal places.

Filter by Status

On the **Time Sheet Entry** page, on the **Time Lines** part, you can now filter by **Status**. This new filter is helpful for identifying transactions with an *Open* status that have not been approved.

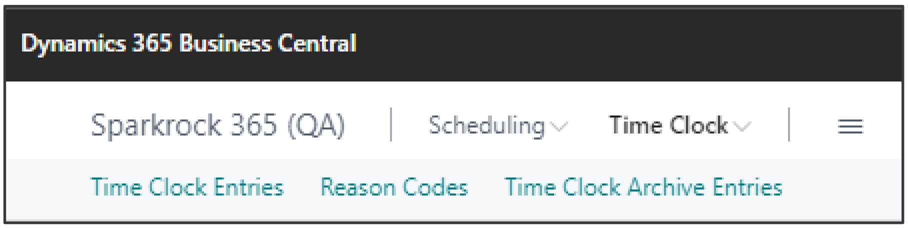
Time Clock core product

A Time Clock feature has been added to the core product. The Time Clock feature within the core product supports the Time Clock feature that is available on mySparkrock. The Time Clock feature is available for users that have been assigned the *Schedule Administrator* role.

Time Clock menu

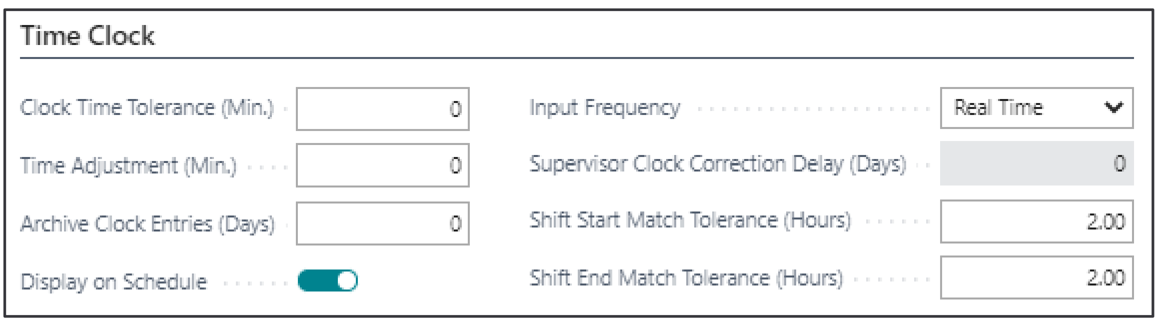
The Time Clock feature is available from the **Time Clock** menu. From the **Time Clock** menu, you can browse to the following pages:

- **Time Clock Entries** page
- **Reason Codes** page
- **Time Clock Archive Entries** page



Setup: Clocking in and clocking out tolerances

Clocking in and clocking out tolerances can be specified on the **Schedule Setup** page, on the **Time Clock** FastTab.



Setup: Display or hide clock in and clock out information on the Unit Schedule page

To have clock in and clock out information displayed on the **Unit Schedule** page, in the core product, on the **Schedule Setup** page, on the **Time Clock** FastTab, turn on **Display on Schedule**. When **Display on Schedule** is turned off, clock in and clock out information is not displayed on the **Unit Schedule** page.

Setup: Time Clock Required field on the HR Employee Assignments page

On the **HR Employee Assignments** page, a **Time Clock Required** column has been added. The value of the **Time Clock Required** field determines whether an employee that is assigned the HR Position Code must use the mySparkrock time clock feature to clock in and clock out for their shifts. If the check box is selected, the employee must use the time clock feature. Otherwise, if the check box is clear, the employee does not have to use the time clock feature.

Pending absence requests, pending change requests, or pending trades are cancelled automatically when an employee clocks in for a shift

When an employee uses the Time Clock feature to clock in for a shift that has a pending absence request, pending change request, or a pending trade, Sparkrock 365 automatically cancels the request.

Time Clock mySparkrock

This release adds a Time Clock feature to the main toolbar. This feature provides the capability for an employee who has an active shift to punch in or punch out. Also, the Time Clock feature provides the capability for unit supervisors to monitor employee attendance and compliance in real-time.

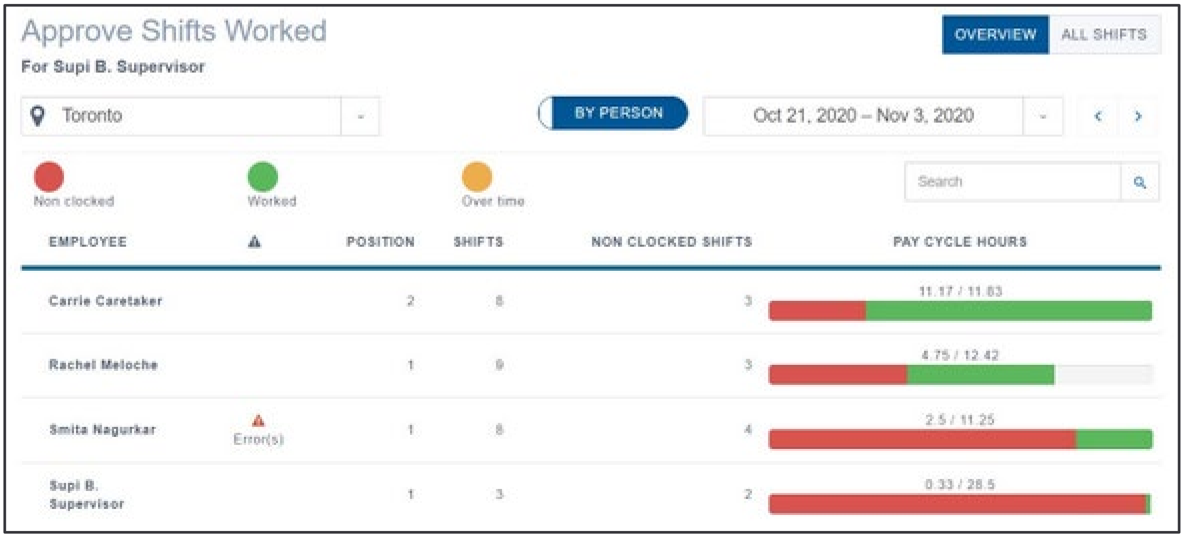
Pending Change Request warning

The new Time Clock feature includes a warning for pending Change Requests. When you clock in or clock out on a shift that has a change request, a warning is displayed that notifies you about the change request.

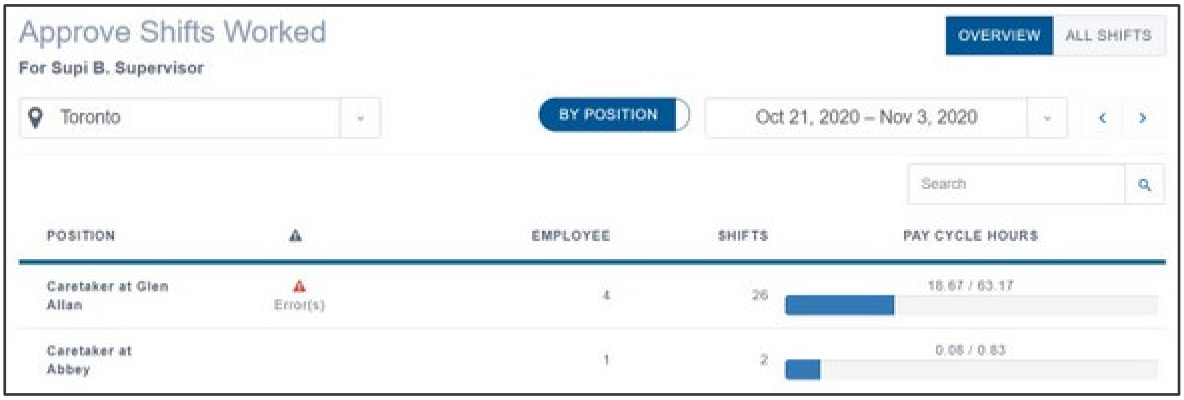
Time Clock Overview dashboard

On the **Approve Shifts Worked** page, a new **Overview** tab has been added. The tab provides the capability for you to view the new **Overview** dashboard. The **Overview** dashboard has **By Person** and **By Position** modes.

By Person



By Position



View missed clock ins or clock outs

On the **Approve Shifts Worked** page, a supervisor can view a list of missed clock ins or clock outs. If required, the supervisor can perform a clock in or clock out on behalf of an employee. Also, if required, supervisors can open the **Shift Details** page for any shift and adjust the clock times.

Determining the shift

If an employee is not clocked in, mySparkrock uses the current date and time to search for a matching shift on the employee's schedule. If a shift exists, a summary of the shift details is displayed, such as the current activity, and next scheduled activity. If a shift does not exist, an employee can create a shift and clock in, provided the employee has the appropriate permission settings to allow this action. For more information about creating a shift, see Creating a shift from the time clock.

Clocking in

When an employee clocks in, the Time Clock button changes its state to indicate that the employee is clocked in. Also, mySparkrock passes the clock in time to the core product. The clock in time is rounded using the configured tolerances. Both the raw and rounded times are displayed on the **Time Clock Entries** page.

Clocking out

When the employee clocks out, the Time Clock button changes its state to indicate that the employee is clocked out. Also, mySparkrock passes the clock out time to core product. The clock out time is rounded using the configured tolerances. Both the raw and rounded times are displayed on the **Time Clock Entries** page.

Clocking in and out rules

The following rules apply to clocking in and out of shifts:

- Employees cannot clock in or out of an absent shift.
- Employees can clock in and out of shifts with a pending change request.
- Employees can only clock in and out of Published shifts.
- Shift trades cannot be active. All trades involving a shift must be cancelled before a clock in or out can occur. If the trade has been accepted, but is not yet approved, a unit supervisor must approve or deny the trade before any clocking actions can occur.

Leaving or returning during a shift

If an employee must leave part way through a shift, and then return later, the employee can do so. The employee must first split the shifts into workable and unworkable parts, and then request an absence for the unworkable part. If the employee clocks out early and must return, the employee is permitted to split an active shift at the time of their return, so that the employee can clock into the new shift.

Viewing and editing clock in and clock out information from the Unit Schedule page

The Time Clock feature provides the capability for unit supervisors to monitor employee attendance and compliance in real-time on the **Unit Schedule** page. To view clock in and clock out information on the **Unit Schedule** page, in the core product, on the **Schedule Setup** page, on the **Time Clock** FastTab, **Display on Schedule** must be turned on.

If an employee forgets to clock into their shift, on the **Unit Schedule** page, *Not clocked in* is displayed on the shift.

If an employee has not punched in or punched out for their shift, on the **Unit Schedule** page, unit supervisors can enter missed punch ins or punch outs. When entering missed punch ins or punch outs, the supervisor must specify a **Reason Code**. The clock in and clock out information that is entered can be viewed within the core product on the **Time Clock Entries** page.

Multiple HR Employee Assignments with different values

It is possible for an employee to have on the **HR Employee Assignments** page, multiple HR Position Codes that have the **Time Clock Required** field turned on. When this setup occurs and a shift is created with the **Time Clock**, a list of those HR Position Codes that have the **Time Clock Required** field turned on is displayed, so that the appropriate shift details can be specified. For an existing shift, a position list is not displayed because a shift can only have one position.

Shift status changes when an employee clocks in

When an employee clocks in for a shift, the shift **Status** changes as indicated in the following table.

Shift Status Before Clock In	Shift Status After Clock On
Open	*Published*
Published	*Published*
Confirmed	*Published*
Approved	*Published*

Creating a shift from the time clock

When trying to clock in, if a shift does not exist, an employee can create a shift and then clock, provided the employee has the appropriate permission settings to allow this action.

When the employee creates the shift from the **Time Clock** on mySparkrock, the employee is prompted for the shift start and end times. The shift is initially set to have the employee selected start time as both the start and end times. Also, a change request is automatically submitted for the specified end time, so that a supervisor can approve the request.

On creation of the shift, the employee is clocked in at the specified start time. If required, even if the unit supervisor has not approved the change request yet, the employee can clock out.

Note: When a shift is created in this manner, a supervisor must approve the shift. If a supervisor declines or ignores the shift, bad data is created because the time clock entries have been created.

Viewing clock in and clock out information from the My Schedule page

On the **My Schedule** page, supervisors can view clock in and clock out information. Employees cannot view this information from this page.

Upgrade considerations

The following sections include information about upgrade considerations for the Sparkrock 365 Fall 2020 release.

Platform

Permission Sets updates

For permission sets, the permissions for the following new tables can now be defined:

Object ID	Object Name
23020714	*SRS Training Activity*
23020715	*SRS Sched. Unit Shift Argument*
23020716	*SRS Sched. Unit Act. Argument*
23068659	*SRW OECTA Worksheet Line*
23068664	*SRW Employee Tax Buffer v2*
23068727	*SRW Weekly Work Schedule*
23068728	*SRW HR Base Calendar v2*

Finance and Procurement

Intervention is required from Microsoft

In the Microsoft Dynamics Business Central 17.0 release, Microsoft has introduced **ACH RB Detail** and **ACH RB Footer** fields. These fields already existed in Sparkrock 365. To resolve this duplicate fields issue, the Sparkrock data and logic have been redirected to the Microsoft fields.

When upgrading to the Sparkrock 365 Fall 2020 release, intervention is required from Microsoft. To remove the conflicting **ACH RB Detail** and **ACH RB Footer** fields, Microsoft must force the updated Sparkrock 365 Finance and Procurement extension in.

Note: In SR Cloud environments, intervention from Microsoft is not required.

HR Management

Created By User ID field populated

When upgrading to the Sparkrock 365 Fall 2020 release, on **HR Request** pages, if the mySparkrock user in the **Requested by mySparkrock User No.** field that was removed has an internal User ID associated, that User ID is populated in the new **Created By User ID** field.

Employee Benefits part standardization on HR Requests

Due to the new Employee Benefits part standardization on HR Requests feature, the load of standard HR Reason Codes is run automatically during the install of the Sparkrock 365 Fall 2020 release. Any modifications that customers have performed to the standard HR Reason Codes will be overwritten.

Customer licenses must be regenerated

For any customers that use HR Management and want to access and use the new **HR Department Manager** role center, a license update is required. For assistance with a license update, contact Sparkrock Support.

Scheduling and Time Entry

Training Management integration to Employee Scheduling

The following sections include upgrade considerations for the new Training Management integration to Employee Scheduling feature.

Link to historical records maintained

For any data that is migrated from Sparkrock 2016, the link to the historical records is maintained. Existing training records and lines that are already linked to the schedule can be deleted or have their status changed.

Training activities in UNAVAILABLE Schedule Units have been moved

When you upgrade to the Sparkrock 365 Fall 2020 release, if training activities have been set up in one or more *UNAVAILABLE* Schedule Units, the training activities are moved to the new training Schedule Unit. The first training activity that is encountered is set as the default.

Defects corrected

The following sections include information about the defects that have been corrected in the Sparkrock 365 Fall 2020 release.

Platform

Microsoft Dynamics 365 Business Central cumulative platform fixes

The base Microsoft Dynamics 365 Business Central platform which powers Sparkrock 365 has been updated from 16.3 to 17.0. To view a detailed list of cumulative platform fixes that are available from Microsoft, see Update history for Microsoft Dynamics 365 Business Central.

Finance and Procurement

Claims List displays incorrect Claim Date on the Expenses & Claims page

On mySparkrock, on the **Expenses & Claims** page, when you perform the following steps, an incorrect **Claim Date** is displayed:

1. Choose **Claims**.
2. Choose **New**.
3. Specify the required fields and set the **Claim Date** to something other than today's date.
4. Return to the Claims list.

Resolution

The **Claim Date** field now displays the correct date.

Sort by Date is incorrect on the Expenses & Claims page

On mySparkrock, on the **Expenses & Claims** page, when you sort by date, the results are incorrect.

Resolution

When you sort by date, the results are now correct.

Account Set Code values and corresponding Dimension Values are blank on the resulting General Ledger records when a Bank Reconciliation that includes customer and vendor adjustments is posted

On the **Bank Rec. Worksheet** page, on the **Adjustments** FastTab, you can specify customer and vendor adjustments and **Account Set Code** values. When this bank reconciliation is posted, on the resulting General Ledger records, the **Account Set Code** values and the corresponding Dimension values are blank.

Resolution

Now, when the bank reconciliation is posted, the **Account Set Code** details and the corresponding Dimension values are now populated on the resulting General Ledger records.

API error when creating an expense on mySparkrock

On mySparkrock, an API error occurs when an expense is created, and the following setup exists in the core product on the **Dimension Validation Setup** page:

- On the **General** FastTab, **Enable Account Set Validation** is turned on.
- In the **Validated Dimensions** part, for an *Expense Claim*, **Enable** is selected.

Resolution

The API error no longer occurs. The Account Set validation now takes place after Dimension or G/L Account details are specified.

Configure action configures Dimension Values that do not have the Dimension Value Type of Standard

On the **Fund Accounting Setup** page, when the **Configure** action is chosen, Dimension Values that do not have a **Dimension Value Type** of *Standard* are configured. Also, when the **Confirm Configuration** action is chosen, Dimension Values that do not have a **Dimension Value Type** of *Standard* are considered.

Resolution

Now, when the **Configure** or **Confirm Configuration** actions are chosen, only Dimension Values that have a **Dimension Value Type** of *Standard* are configured or considered.

Import Invoice Lines action is not loading Account Set Codes

On a purchase invoice, when the **Import Invoice Lines** action is chosen, and in the template file there are records where the **Type** is *G/L Account* and the **No.** column is blank, the **Account Set Code** details are not loaded.

Resolution

The **Account Set Code** details are now loaded. Also, when records are loaded, the G/L Account numbers and Dimension values are now determined based on the Account Set.

Purchase Header does not exist error

When a vendor has Recurring Purchase Lines setup and a purchase order is created for this vendor, the following error message is displayed:
The Purchase Header does not exist.

Resolution

The error message is no longer displayed.

Purchases is displayed twice on the Vendor Card page action bar

On the **Vendor Card** page, on the action bar, **Purchases** is displayed twice.

Resolution

Now, **Purchases** is only displayed once.

Unnecessary message is displayed when canceling a file upload

When importing deposit information from Excel and you perform the following steps, an unnecessary *Microsoft.Dynamics.Nav.Runtime.NavInStream variable not initialized* message is displayed:

1. On the **Deposit** page, on the action bar, choose **Process** > **Import from Excel**.
   The **Import From Excel To Deposits** page opens.
2. On the **Import From Excel To Deposits** page, in the **Workbook File Name** or **Worksheet Name** fields, choose **Open assist edit**.
   The **Upload: Excel Files (*.xls*), All Files (*.*)** dialog box opens.
3. Choose **Cancel**.

Resolution

The message is no longer displayed.

Unable to go to a purchase order from a purchase requisition

On the **Purchase Requisition** page, when you choose the **Related** > **Documents** > **Orders** action, an invalid error message is displayed, and the **Purchase Orders** page does not open. For example, the following error message is displayed:
Copying all filters at once can only be done between records that belong to the same table.
Table: Purchase Line <-- Purchase Header
Copy the necessary filters individually.

Resolution

The error message is no longer displayed, and the **Purchase Orders** page opens.

Unable to perform a Fixed Asset reclassification

On the **Fixed Asset Reclassification Journals** page, when you choose the **Reclassify** action to perform a reclassification for a fixed asset that has an acquisition cost, an invalid error message is displayed, and you cannot complete the reclassification. For example, the following error message is displayed: *Acquisition Cost = 0 for Fixed Asset No. = FA00016 in Depreciation Book Code = COMPANY.*

Resolution
The error message is no longer displayed, and you can now complete the reclassification.

Expense types are not displayed

On mySparkrock, eligible expense types are not displayed.

Resolution
mySparkrock has been updated to display the expense types that are displayed on the **Expense Type Card** page and that have the **Expense Type Category** field equal to blank and the **Expense Claim** field turned on.

Purchasing Card payment method is not automatically populated on a purchase invoice

If a user does not populate data on a Purchasing Card (PCard) expense, and then creates a claim, when a user converts this claim to a purchase invoice, the required Payment Method Code, which is specified on the **Purchase & Payables Setup** page, is not automatically populated.

Resolution
The payment method code is now automatically populated.

Detaching a Purchasing Card expense from a claim removes the mySparkrock User No. field value

On mySparkrock, on a new claim, when you detach a Purchasing Card line, and then check the unassigned expenses in the core product, the expense is no longer assigned to a mySparkrock User No.

Resolution

In the core product, on the expense line, the **mySparkrock User No.** field now includes the correct value.

Notification email for an alternate approver does not specify for whom they are required to approve a document

On a notification email for an alternate approver, the body of the email does not specify for whom the alternate approver is required to approve a document. For example, the following text is displayed in the body of the notification email: *Purchase PR100177 requires your approval on behalf of as an alternate.*

Resolution

The body of the email now specifies for whom the alternate approver is required to approve a document.

Write-Down Expense Acc. field is not visible by default

On the **FA Posting Groups** page, the **Write-Down Expense Acc.** field is not visible by default.

Resolution

The **Write-Down Expense Acc.** field is now visible by default.

Alternate list does not display valid alternates

On mySparkrock, on the **Expenses & Claims** page, the **Alternate** field is not displaying a valid list of alternates.

Resolution

The **Alternate** field now displays a valid list of alternates.

Approval entries for other approvers with the same sequence remain open

When a purchase request is approved, on the **Approval Entries** page, the **Status** of approval entries for other approvers in the same approval group that have the same sequence remain *Open*.

Resolution
When a purchase request is approved, the **Status** of approval entries for all approvers in the same approval group that have the same sequence are now changed to *Approved*.

Invalid message is displayed when requesting approval of a purchase requisition

When you request approval for a purchase requisition, an invalid message is displayed. For example:
Status must be equal to 'Open' in Purchase Request Header: No.=REQ0330. Type=Purchase. Current value is 'Pending Approval'.
Page New – Purchase Requisition - REQ0330 has to close.

Resolution
The invalid message is no longer displayed.

Unit Cost is not populated on a Purchase Requisition or Payment Request

On the **Purchase Requisition** and **Payment Request** pages, the **Unit Cost** field is blank. This issue occurs when on the **Expense Type Card** page, the **Purchase Requisition** or **Purchase Request** fields are turned on and a **Unit Amount** is specified.

Resolution
The Unit Cost is now displayed.

Total Distance (Last Year) field is displaying an incorrect amount

On an **Expense Claim** for distance, on the **Distance Details** FactBox, the **Total Distance (Last Year)** field is displaying an incorrect amount because the current date is being used instead of the Work Date.

Resolution

The field calculations for the **Distance Details** FactBox have been updated to use the Work Date instead of the current date.

Distance Details FactBox is incorrectly displaying values in red that have not exceeded the Mileage Rate Threshold

On an **Expense Claim** for distance, on the **Distance Details** FactBox, the fields are displayed in red even though the mileage on the claim has not reached the **Mileage Rate Threshold**, which is set on the **Purchase & Payables Setup** page.

Resolution

On the **Distance Details** FactBox, the fields are now only displayed in red when the mileage on a claim exceeds the **Mileage Rate Threshold**, which is set on the **Purchase & Payables Setup** page.

Gross Unit Cost is not populated for mileage lines

On an **Expense Claim** with the **Type** of *Distance*, the **Gross Unit Cost** is not populated for mileage lines.

Resolution

The **Gross Unit Cost** is now populated for mileage lines.

Max Allowable Amount on an Expense Type is updating past prices

On the **Expense Type Card** page, when the **Max Allowable Amount** field is set and then on the action bar, the **Prices** > **Price List** action is chosen, on the **Price List Lines**, past prices are updated.

Resolution

Now, only current, or future prices are updated.

Budget Available column does not include commitments

On the **Chart of Accounts**, the **Budget Available** column does not include commitments in the calculation.

Resolution

The **Budget Available** column now includes commitments in the calculation.

Available types are filtered by the selected G/L account

On a **Purchase Order**, if an Expense Type is added to the page, the available types are not filtered by the selected G/L account.

Resolution

The available types are now filtered by the selected G/L account.

Incorrect information is displayed for an entry number

On the **Purchasing Card Registers** page, when you choose an **Entry No**, incorrect information is displayed.

Resolution

Incorrect information is no longer displayed.

Tax overrides are not saved

On mySparkrock, tax overrides are not saved. This defect occurs when on the **Expense Type Card** page of the core product, the **Unit Amount Type** field is equal to *Includes Tax*.

Resolution

On mySparkrock, Tax overrides are now saved when on the **Expense Type Card** page of the core product, the **Unit Amount Type** field is equal to *Includes Tax*.

Values from user account set exceptions can be used outside of an account set

On mySparkrock, when creating or editing an expense, a G/L account that is outside of the security filter for a user account set can be saved.

Resolution

A G/L account that is outside of the security filter for a user account set can no longer be saved. An error is now displayed.

Mileage rate change is triggered at the threshold

For an **Expense Claim** for distance where an over threshold rate is setup for mileage, when the threshold is reached, the new rate is applied. The new rate must not take effect until after the threshold is exceeded.

Resolution

The new rate is no longer applied when the threshold is reached. The new rate is only applied after the threshold is exceeded.

Template Comments not populated when a claim is created

On mySparkrock, when a claim is created from a template, the **Comments** that are specified in the template are not automatically populated on the claim.

Resolution

When a claim is created from a template, the **Comments** that are specified on the template are now automatically populated on the claim.

Approval Date displays as 12/31/0000

When no approvers are calculated for an Expense Claim, the **Approval Date** displays *12/31/0000*.

Resolution

The **Approval Date** field now displays the date that the approval was submitted.

Profile Data Sets action opens the same page twice

On the **Data Sets** page, when the **Profile Data Sets** action is chosen, the **mySparkrock Profile Data Sets** page opens twice and sometimes a blank page is displayed.

Resolution
Now, when the **Profile Data Sets** action is chosen, the **mySparkrock Profile Data Sets** page only opens once.

Changing a dimension value does not clear the Account Set Code field

On mySparkrock, for an Unassigned Expense with the **Type** of *Expense Claim*, when you change a dimension value that is part of the Account Set, the **Account Set Code** field is not cleared.

Resolution
Now, when a dimension value that is part of an Account Set is changed, the **Account Set Code** field is cleared.

Expense Claim Policy Warnings FactBox terminology clarifications

On the **Expense Claim** page, on the **Policy Warnings** FactBox, the *Yes* and *No* terminology is not clear, for example, a value of *Yes* means no warnings and a value of *No* means there are warnings.

Resolution
The terminology has been updated so that *OK* is displayed when there is no warning and *Check* is displayed when there is a warning.

Empty page is displayed when options are present

On a **Posted Credit Memo**, when the **Option Set Entries** are opened from a line and options are present, an empty page is displayed.

Resolution
When the **Option Set Entries** are opened from a line and options are present, records are now displayed.

Inactive and blocked users are displayed in lists on the Scheduled User Replacements page

On the **Scheduled User Replacements** page, when you choose **Look up value** for the **Old mySparkrock User** or **New mySparkrock User** fields, inactive and blocked users are displayed.

Resolution
Inactive and blocked users are no longer displayed. A validation has also been added to ensure that the user that is specified is not inactive or blocked.

Line Action data is deleted on the Payment Request page when an Item No. is specified

On the **Payment Request** page, on the **Lines**, when in the **Type** field, *Item* is specified, and then in the **No.** field, a value is specified, data in the **Line Action** field is deleted.

Resolution
The **Line Action** field is no longer deleted.

HR Management

Batch Process HR Requests action is not considering approvals

On the **HR Requests** page, when the **Batch Process HR Requests** action is chosen, HR Requests that require approval are processed without obtaining the required approval.

Resolution
Now, when the **Batch Process HR Requests** action is chosen, Sparkrock 365 checks to see whether an approval is required for an HR Request.

HR Base Calendar Code field length is causing a length of string error

On the **HR Base Calendar Card** page, in the **Code** field, a field length of greater than 10 characters can be specified. This setup causes an error to be displayed on the **HR Base Calendar List** page when you try to view the **HR Base Calendar Card** page for this Code. The error indicates that the string must be less than or equal to 10 characters.

Resolution

Now, on the **HR Base Calendar Card** page, in the **Code** field, the field length must be less than or equal to 10 characters.

Error when terminating employee with an Effective Date that is the same as the Assignment Calculation Start Date

In a specific scenario that involves a *New Hire* HR Request and a *Termination* HR Request for an employee, when the **Effective Date** is the same as the Assignment **Calculation Start Date**, the following error is displayed:
The HR Employee Assignment Table is empty.
To recreate this issue, the following steps must be performed:

1. Create an HR Request with a **Reason Code** of *New Hire*.
2. On the action bar, choose **Process All Steps**.
3. Create another HR Request with a **Reason Code** of *Termination*.
4. On the action bar, choose **Process All Steps**.

Resolution

Now, for this scenario, no error is displayed and when an active HR Employee Assignment cannot be found, a Termination HR Employee assignment is created that is based on the previously cancelled HR Employee Assignment.

Unable to modify eligible fields on the OTIP Export page

Even though on the **HRIS Export File Definitions** page for the OTIP export, the **Allow Editing on Export** field is selected for specific fields, on the **OTIP Export** page, after you choose the **Process** > **Load Data** action, you cannot modify those fields.

Resolution
Fields that have on the **HRIS Export File Definitions** page, the **Allow Editing on Export** field selected, can now be modified on the **OTIP Export** page.

Initials field does not display all employee initials

For new hire HR Requests, on the **Details** page, the **Initials** field is confusing because the field does not display all employee initials.

Resolution
On the **Details** and **Employee Card** pages, the field caption has been renamed from **Initials** to **Middle Initials**.

Leave entitlements are not received when an employee has a termination date in the future

When an employee has a termination date in the future and the entitlement for the employee has the **Prorate Ending Assignments** field turned on, the employee does not receive any leave entitlements.

Resolution
Now, when an employee has a termination date that is between the entitlement year start date and end date, and the **Prorate Ending Assignments** field is turned on, the entitlement is prorated. Otherwise, when the **Prorate Ending Assignments** field is turned off, the employee does not receive any leave entitlements.

Leave HR Pay Code is not populated on the HR Request Worksheet

On the **HR Request Worksheet** page, when lines are loaded for requests that have leave and return HR Reason Codes, and a value is specified on the **Load HR Request Worksheet** page, in the **Leave HR Pay Code** field, on the resulting worksheet lines, the **Leave HR Pay Code** fields are blank.

Resolution

Now, when this scenario occurs, the **Leave HR Pay Code** fields are populated.

Note: While working on this defect, a field name consistency issue was discovered. To correct this issue, on the **Load HR Request Worksheet** page, the **HR Pay Code While on Leave** field was renamed to **Leave HR Pay Code**.

HR Employee Assignments filter results are incorrect

On the **HR Employee Assignments** page, when an **Entry Type Filter** is specified, the results that are displayed are incorrect.

Resolution

The correct results are now displayed.

Unable to make changes to the General FastTab on HR Requests

On HR Requests for specific HR Reason Codes, after you choose **Process** > **Details**, enter details, and then exit all pages, when you return to the **HR Request** page, the **General** FastTab remains in read-only mode and you cannot make changes.

Note: This issue only occurs for HR Requests that do not have HR Request process steps, such as *Job Requisition*, *One-Time Payment*, and *Notification*.

Resolution

After entering details on the **Details** page of an HR Request, you can now make changes on the **HR Request** page, on the **General** FastTab.

Overbalance absence request error box does not display any text

On mySparkrock, when there is an overbalance absence request, a red error box is displayed without any text.

Resolution

The red error box now displays text. For example:

Negative Balances are not permitted for Cause of Absence Code MOVING

Employee appraisals are displayed for HR Employee Assignments that do not report to the manager

On mySparkrock, on the **Appraisals** page, appraisals for employees that do not report to the manager are displayed.

Resolution

Now, only employee appraisals that meet all the following conditions are displayed to the manager:

- Appraisals where the manager has an assignment that is equal to the Appraisal **Reports to Position**.
- Appraisals where the manager's assignment was active on the **Due Date** for overdue appraisals.

mySparkrock profile assignments display hours per week and day based on the HR Position instead of the assignment

On mySparkrock, on the **My Self Service** > **Profile** page, in the **Assignments** section, the **Hours/Week** and **Hours/Day** fields incorrectly display values that are based on the HR Position. Instead, the correct values to display are the values that are based on the assignment.

Resolution

The **Hours/Week** and **Hours/Day** fields now display values that are based on the assignment.

Appraisal not displayed

On mySparkrock, when a user has two positions and the secondary position is selected, eligible appraisals for the second position do not display.

Resolution
Eligible appraisals for the second position are now displayed.

Invalid error is received when an HR Request termination is processed, reversed, and then processed again

When an HR Request termination is processed, reversed, and then processed again, an invalid error message is displayed. For example:
The record in table HR Req. Closed Assignment already exists. Identification fields and values: Entry No.='5', Closed by HR Request No.='C00090'

Resolution
The invalid error message is no longer displayed.

Work Status Upon Return and Active FTE upon Return fields are not populated

On the **Load HR Request Worksheet** page, when you specify an **HR Reason Code** of *Full Return*, *Leave and Return,* or *Teacher on Leave and Return,* and then you specify a value in the **Work Status Upon Return** field, on the resulting **HR Request Worksheet** page, the **Work Status Upon Return** and **Active FTE upon Return** fields are not populated.

Resolution
The fields are now populated.

Vacation Allowance Start Date and End Date field values are incorrect when employees are placed on leave and then return to work

On HR Requests for employees who are placed on leave and then return to work, the vacation allowance **Start Date** and **End Date** field values are incorrect.

Resolution
The vacation allowance **Start Date** and **End Date** field values are now correct.

Misleading error message when processing an HR Request for assignment end

When processing an HR Request for an assignment end, the following misleading error message is displayed:
A "Reason Code" must be selected before ROE generation can occur.
The message is misleading because the error is displayed when a Grounds for Termination has not been selected.

Resolution
The error message has been updated to display the following wording:
Grounds for Termination must be selected before ROE generation can occur.

Unable to delete an Attendance Approval request

After performing a save of an Attendance Approval request, if you try to delete the request, the following error is displayed:
Unable to delete this absence request. You do not have permission or it has already been approved.

Resolution
An Attendance Approval request can now be deleted.

To Date and From Dates are not displayed after a Submit action

On mySparkrock, for an **Absence Request** linked to Scheduling, the *To Date* and *From Dates* are not displayed after the **Submit** action.

Resolution
After **Submit** is chosen, the *To Date* and *From Dates* are now displayed.

Incorrect link sent to approver of an absence approval email notification

When an absence approval email notification is sent to an approver, an incorrect link is included in the email.

Resolution
The correct link is now included.

Pending absence request is not displayed

On mySparkrock, on the **My Team** list, in the **Absence Requests Pending** column, a link to view the request is not displayed.

Resolution

A link to view the request is now displayed.

HR Employee Assignment is not current

When re-processing a *Termination* HR Request that had previously been reversed, the HR Employee Assignment is not current.

Resolution

The HR Employee Assignment is now current.

Page title is missing on HR Request Details page

On the **Details** page for an HR Request, the page title only displays the word Page.

Resolution

The correct page title is now displayed.

Focus mode for Sequencing part is blank

On the **Absence Request** page for a request that has sequencing lines, when you enter focus mode for the **Sequencing** part, no lines are displayed.

Resolution

The lines are now displayed.

HR Position Information FactBox displays incorrect values

When an HR Position Card is created, even though no details have been specified yet, the **HR Position Information** FactBox fields display values that are greater or less than zero.

Resolution

Now, when an HR Position Card is created, the **HR Position Information** FactBox fields display amounts of zero until details have been specified.

Multiple messages displayed for approval request with no approver

When requesting an approval and there are no approvers because the corresponding Approval Group is empty, a message that indicates the request has been automatically approved is displayed. For example:

Purchase Requisition REQ0294 has been automatically approved.

After you choose **OK**, the following message is displayed:

No approval requests exist.

Resolution

Now, when this scenario occurs, only one message is displayed. For example:

No eligible approvers found for approval rule EMPTY POS. Please update your approval setup before proceeding.

Incomplete message body for Absence Request notifications

When a user has **Block Absence Notifications** selected, and that user submits a new absence request or cancels an absence request, the body of the resulting notification displays the following incomplete content:

This is a message to notify you that:

Notification message are sent automatically and cannot be replied to. But you can change when and how you receive notifications:

Note: The **Block Absence Notifications** field is designed to only affect request notifications for an approver, not a requester.

Resolution

The Sparkrock 365 processing logic for the **Block Absence Notifications** field has been updated to not consider the requester or submitter. Also, incomplete notifications are no longer sent to users.

Payroll Administration

Invalid error when Print All Checks action is chosen

On the **Batch Payroll Processing** page, when the **Print All Checks** actions is chosen, an invalid error is displayed. For example:
Check Printed must be equal to 'No' in Payroll Header: No.=PRP10773. Current value is 'Yes'.
Note: Primo checks print as expected.

Resolution
The invalid error is no longer displayed.

MICR line is not printed on US paychecks

When performing payroll processing, even though on the **Primo Payroll Integration Setup** page, on the **Payroll Processing** FastTab, **Print MICR Line on Pay Check** is turned on, the MICR line is not printed on US paychecks.

Resolution
The MICR line is now printed on US paychecks.

Compensation Journal Amount and Deferral Amount are incorrect for an employee with salary deferral who has been terminated

On the **Compensation Journal** page, for an employee with salary deferral who has been terminated, the **Amount** and **Deferral Amount** are incorrect. The **Amount** must consider the termination date. Also, if there are any remaining deferrals, those deferrals must be processed as a forced payout later.

Resolution
The **Amount** and **Deferral Amount** are now pro-rated based on the number of working days.

First Date Worked default value is incorrect when a Mass Create Teacher Records of Employment is processed

When a **Mass Create Teacher Records of Employment** is processed, and on the **Options** FastTab, the **First Date Worked** field is left blank, the default value that is assigned for the **First Date Worked** field is incorrect. This issue results in the following error being displayed when you try to send the results to a Microsoft Excel Document file:

You cannot base a date calculation on an undefined date.

Resolution

When the **First Date Worked** field is left blank, the default value that is assigned is now based on the HR Assignment.

Blended rates are not used when calculating overtime

On the **Compensation Journal** page, when you choose **Calculate Overtime**, and then turn on **Compute Blended OT Rates**, in the **Hourly / Daily Rate** column, the blended rates are not displayed. Also, the blended rates are not used for overtime calculations.

Resolution

The blended rates are now displayed and are used for overtime calculations.

Fully paid absence rows cannot be posted in the compensation journal

On the **Compensation Journal** page, when there are rows for fully paid absences, and then on the action bar **Post/Print** > **Post** is chosen, an invalid error message is displayed and posting of the records cannot be completed. For example, the following error message is displayed:

Payroll Status must be equal to 'Processed' in Compensation Journal Line: Journal Template Name=DEFAULT, Journal Batch Name=SRTST_II, Line No.=30000. Current value is 'Not Sent'.

Resolution

The error message is no longer displayed, and fully paid absence rows can now be posted.

Misleading warning is displayed multiple times

On the **HR Pay Cycles** page, when you choose the **Create from Payroll** action, for any pay cycle sub-types that were not updated, the same warning is displayed multiple times. Also, the warning is misleading because sub-types do exist.

Resolution

The warning is only displayed once now, and the warning description has been improved.

Scheduling and Time Entry

Negative Quantity is not displayed on an Absence Registration when the Absence Request is automatically approved

When an Absence Request with a negative amount is automatically approved, the corresponding record on the **Absence Registration** page, has a positive amount.

Resolution

Now, on the **Absence Registration** page, the negative amount is displayed.

Cannot save line twice when entering time on mySparkrock Timesheets

On mySparkrock, on the **Timesheets** page, when you perform the following steps, you cannot save the changes:

1. Enter time for one day, and then save the line.
2. Enter time for another day, and then press **Tab**.

Resolution

Now, you can save the changes.

Subordinates are displayed when the user does not have any subordinates

On mySparkrock, on the **Timesheets** page, subordinates are displayed when the user does not have any subordinates.

Resolution

Subordinates are now only displayed when the user has subordinates.

Working days calculation is incorrect when sending a time sheet line for approval and the lieu time tolerance for the week or day is exceeded

On the **Time Sheet Entry** page, when sending a line for approval, and the lieu time for the week or day has exceeded the maximum tolerance, the number of working days that is displayed on the error message is incorrect.

Resolution

The correct number of working days is now displayed on the error message.

Hours on Time Entry Approval Entries are reset when time sheets are rejected

When time sheets are rejected, on the **Time Entry Approval Entries** page, the **Hours** field is reset.

Resolution

When time sheets are rejected, the **Hours** field is no longer reset.

Not all time lines are processed for a time sheet entry when you cancel an approval request for a selected employee

On the **Time Sheet Entry** page, when there are multiple **Time Lines** records and on the action bar, **Actions** > **Request Approval** > **Cancel Approval Request** > **Selected Employee** is chosen, not all records are processed.

Resolution

All lines are now processed.

The status of a shift is not updated when making a shift vacant

When a shift is made vacant, the **Status** of the shift is not always updated. For example, a shift with the **Status** of *Approved* is not updated.

Resolution

When a shift is made vacant now, the **Status** of the shift is updated based on the **Status** of the original shift. If the **Status** of the original shift is *Open*, the status remains as *Open*. If the original shift does not have a **Status** of *Open*, the status is now changed to *Published*. Vacant shifts with a **Type** of *Position* can only have a **Status** of *Open* and *Published*.

Missing validations on an Absence Request when the To Date and From Date are the same and the To Time is less than the From Time

When creating an Absence Request, when you specify the same date in the **From Date** and **To Date** fields, and then enter a **To Time** that is less than the **From Time**, no notification or error is displayed.

Resolution

The following notification is now displayed:
The From Date/Time and To Date/Time for absence request are incorrect. Specified absence start must not be after end date.
If the **Process** action is chosen, the following error is now displayed:
Specified absence start must not be after the absence end.

Error is displayed when trying to create a shift

On mySparkrock, on the **Unit Schedule** page, when you perform the following steps, an error is displayed:

1. As a supervisor, go to the **Scheduling** > **Unit Schedule** page.
2. Choose **New Shift**, and then specify a date.
3. Choose **Create**.

Resolution

No error is displayed now, and the **Shift Details** page opens.

Console error is observed when you Confirm Shifts Worked

On mySparkrock, on the **Confirm Shifts Worked** page, when you perform the following steps, a console error is observed:

1. Schedule an employee for a shift in the past.
2. Login as that employee.
3. Go to the **Scheduling** > **Confirm Shifts Worked** page.
4. Specify the period, select the shift, and then choose **Confirm**.

Resolution

The shift is now confirmed.

Console error is observed when resaving data

On mySparkrock, on the **Timesheets** page, when you perform the following steps, a console error is observed:

1. Enter hours for the day, for example *10*, and then save the line.
2. On the same day, clear the value.
3. Enter hours for the day again, for example *10*, and then save the line.

Resolution

An error is no longer observed.

Confusing timesheet error when clearing time with a daily comment

On mySparkrock, when you perform the following steps on the **Timesheets** page, a confusing *You must enter hours before comments can be made* error is displayed:

1. Enter time for a day, and then save the line.
2. Enter a daily comment for that day.
3. Clear the time that was entered for that day, and then save the line.

Resolution

When the time for the day is cleared, the daily comment is now deleted.

Employee not restored in original shift when an absence is resequenced

In a specific scenario, when running **Mass Register Employee Absences** and a scheduling absence is resequenced, the absence shift still exists and the original employee is not restored in the original shift.

Resolution

The absence is now reopened, and the original employee is restored in the original shift.

Top up vacation is applied incorrectly

In a specific scenario for an absence that is linked to scheduling, top up vacation is applied incorrectly. This issue occurs when an employee has the following sequencing setup for vacation time and only has a balance for VAC-SCHED:

1. Use carry over (VCARRY-SCH) vacation first.
2. Use vacation (VAC-SCHED) with **Absence Top Up** turned on
3. Top up vacation with bonus vacation.

When this issue occurs, on the **Absence Request** page, in the **Warning 1** field *Top Up Applied* is displayed, and the **Sequencing** section displays a line that indicates carry over has been used as a top up with quantity equal to zero.

Resolution

When this scenario occurs, top up vacation is no longer applied.

Cannot submit more than one line

On mySparkrock, on the **Timesheet Admin** page, if you select multiple lines, and then choose **Submit**, only one line is saved.

Resolution

All lines are now saved.

Time sheet data is not saved

When submitting multiple timesheets with many lines, after saving a time sheet, and then submitting the time sheet, different data from a previously saved timesheet may be displayed.

Resolution

Time sheet data is now saved correctly and data from a previously saved timesheet is not displayed.

Time sheet data saving issue

On mySparkrock, when you are completing a time sheet and you try to save your data, a *You must enter hours before comments can be made* error is displayed and you cannot complete the save.

The error occurs when the following steps are completed:

1. Time is entered on the first line only.
2. Comments and line comments are entered, and then **Save** is chosen.
3. Time is entered on the second line without entering any comment.

Resolution

For this scenario, the error is no longer displayed.

A row with unsaved changes can be submitted

On mySparkrock, on the **Timesheet Admin** page, a selected row can be changed. When the row is submitted, the changes are discarded.

Resolution

When a row is changed, the selection check box is now cleared.

A maximum hours per week error is incorrectly displayed

On mySparkrock, when submitting a timesheet as an employee and there are multiple lines, for a line where the total is under the maximum amount, a maximum hours per week error is incorrectly displayed.

Resolution

When the line total is less than the maximum amount, an error is no longer displayed.

Timesheet totals include values from unsaved lines

On mySparkrock, when you open a timesheet and enter values on multiple lines, and then save only the first line, the timesheet totals include the values from the unsaved lines.

Resolution

Timesheet totals now only include the values from saved lines.

Time sheet approvals do not display individual lines

When opening requests to approve from some Role Centers, time sheet approvals may show the header information, but the individual lines do not display.

Resolution
The individual lines now display.

An error is not displayed when you create or submit an absence request

On mySparkrock, when you create or submit an absence request for a cause of absence that is linked to scheduling and that will go overbalance, an error is not displayed.

Resolution
An error is now displayed.

A restored shift has no activities when no linked shifts are found

When a linked vacant shift is split, the link to the absence is broken. When the absence is cancelled with the **Restore** action, a shift is created for the employee. Instead of using the default activity, an error is displayed for the shift because there is no activity.

Resolution
The shift is assigned the default activity now.

Absences that go overbalance on resequencing are not reopened

Absences that are linked to scheduling and that go overbalance on resequencing are not reopening.

Resolution
Absences that are linked to scheduling and that go overbalance on resequencing are now reopening.

Calculation details disappear

When you view an absence that is linked to scheduling, the **Calculation Details** flash, and then disappear.

Resolution

The **Calculation Details** are now displayed.

Restore action on a filled shift failed

When canceling an Absence that is linked to Scheduling in a unit with more than one designated unit supervisor, the **Restore** action on a filled shift failed and a message related to email recipients was displayed.

Resolution

The **Restore** action on a filled shift does not fail and a message related to email recipients is no longer displayed.

Warning about unsaved lines is displayed and navigation or filter action is discarded

On the mySparkrock **Timesheet** data entry pages, if there are time entry rows with unsaved changes, and you use the page's navigation or filter controls, a warning about the unsaved lines is displayed and the navigation or filter action is discarded.

Resolution

A warning about unsaved lines is no longer displayed and the navigation or filter action remains available.

Unable to reopen lines for update or correction

On the **Time Sheet Entry** page, when Time Entry lines are sent for approval and on the **Time Entry Setup** page, the **Auto Approve Back Office Time Entry** field is turned on, the lines cannot be reopened for update or correction.

Resolution

The lines can now be reopened for update or correction.

Known issues

The following sections include information about known issues in the Sparkrock 365 Fall 2020 release.

Platform

French Canadian Language Support

Some fields are displayed in English.

Finance and Procurement

FA Posting Group Card is unresponsive

When the **FA Posting Group** card is opened, the page becomes unresponsive and cannot be used to set the account values.

Workaround
Enter values directly on the **FA Posting Groups** page.

Employees look up is not available on the Bank Rec. Worksheet page

On the **Bank Rec. Worksheet** page, on the **Adjustments** FastTab, when the **Account Type** of *Employee* is specified, you cannot perform a look up of all employees in the **Account No.** field.

Workaround
To look up the employee details, use the Tell Me feature.

Sales Header does not exist error

When a customer has automatic Recurring Sales Lines setup and a sales order is created for this customer, the following error message is displayed:
The Sales Header does not exist.

Workaround
When creating a sales order, specify a different customer that does not have automatic Recurring Sales Lines setup, and then modify the customer to be the customer which has the automatic Recurring Sales Lines setup.

Name selection field filters are not working correctly

On the **Purchase Invoice**, **Purchase Order**, and **Sales Invoice** pages, when characters are entered in the **Vendor Name** or **Customer Name** fields, a filtered list of records is not displayed.

Workaround
To perform lookups on these pages, use the **Customer No.** or **Vendor No.** fields. To have the **Customer No.** or **Vendor No.** fields displayed on these pages, on the **General** FastTab, choose **Show more**.

Expense Type List may open with no lines displayed

The very first time a user opens the Expense Type list on an expense line, the page may open with no lines displayed. This issue happens when the expense types have not finished loading into the application's data cache.

Workaround
To display the expense types, close the page, and then open the page again.

FA Depreciation Book does not exist error

On the **Fixed Asset Card** page, when you create a fixed asset record and specify a value in the **Depreciation Book Code** field, if you try to change the value that you just specified, you cannot save the changes and the following error is displayed:
The FA Depreciation Book does not exist.

Workaround
Delete the record, and then create the fixed asset record again with the **Depreciation Book Code** field value that you want to use.

mySparkrock link in an Expense Claim email notification does not open the claim

If your default web browser is Microsoft Edge, the mySparkrock link in an Expense Claim email notification does not open the claim.

Workaround
Set another web browser to be your default web browser.

Something went wrong error on the Bank Account Card page

On the **Bank Account Card** page, when you repeatedly choose the **Go to the next document of the same type** or **Go to the previous document of the same type** buttons, a *Something went wrong* error may be displayed and you are logged out of Sparkrock 365.

Workaround
Instead of using the **Go to the next document of the same type** or **Go to the previous document of the same type** buttons to view the **Bank Account Card** page, access the **Bank Account Card** page for each bank account from the **Bank Accounts** page.

Payroll Administration

Payroll Employee or Payroll Processing pages may fail to open

When using the platform security filters on permission sets, the **Payroll Employee** page, **Payroll Processing** page, or both pages may fail to open with a *something went wrong* error message. This is a limitation of the payroll processing module.

Workaround
Remove the permission sets with security filters from the user who must access these pages.

Appendix

Apps available on Sparkrock 365

Apps available on Sparkrock 365

Canadian installations

App Name	Publisher	App Description
Installed by default		
Application	Sparkrock	Application (CA)
Base Application	Microsoft	Base Application (CA)
Core Application	Sparkrock	Core Application (CA)
English language (Canada)	Microsoft	This application adds the English language (Canada) to Dynamics 365 Business Central
Finance and Procurement	Sparkrock	A financial accounting and procurement product that is purpose-built to serve the needs of mission-based organizations. Enables your finance department by automating processes and data sharing across all of your accounting, budgeting, purchasing and approval workflows. Streamlines accuracy, efficiency, and transparency across all financial processes and reporting.
HR Management	Sparkrock	A human resources management product that enables your HR team to work more efficiently with all your common HR processes in one solution. Connects a single source of employee data to Finance, Payroll, and Scheduling–reducing the administrative burden and improving compliance.
Platform	Sparkrock	
Primo Payday	Primo Payday	Increase efficiency and financial analytics with this fully integrated payroll solution. Post payroll directly to your GL and easily leverage the payroll accounting detail for financial analysis.
Primo Payday Connector	Sparkrock	With the Primo Payday Connector App, we are able to provide an integrated payroll product that simplifies and automates pay for greater reliability. Staff cab run payroll correctly every time without the stress of error-prone manual tasks, including complex payroll calculations. Save payroll administration time with straightforward allocations for job-sharing, employees working in multiple roles, and complex direct and indirect costs.
Scheduling	Sparkrock	A scheduling product that makes scheduling more efficient and organized, including templates, auto-fill settings, and self-service capabilities for employees and managers. Proactively prevent budget issues with automatic warnings for schedule changes that could lead to overtime costs. Staff details such as qualifications, seniority, and availability are readily available to supervisors.
Send remittance advice by email	Microsoft	Allows to send remittance advice to vendors by email
Send To Email Printer	Microsoft	Provides functionality to use the printer's email address to send print jobs to the printer.
System Application	Microsoft	Provides a standard set of capabilities that serve as a foundation for developing business apps.
Time Entry	Sparkrock	A time entry product that makes your time entry process more efficient and traceable. Categorize activities on time sheets to collect the information you need, and automate approval notifications to managers about submitted time sheets. Load approved time sheet entries directly into payroll without any reformatting and seamlessly integrate allocation data for different departments, cost centers, or dimensions.

Apps available on Sparkrock 365

Available to install		
AMC Banking 365 Fundamentals	Microsoft	AMC Banking 365 Fundamentals for Microsoft Dynamics 365 Business Central
Business Central Cloud Migration - Previous Release	Microsoft	Enables data migration from the previous version of Dynamics BC (n-1) to the current release of Dynamics 365 Business Central SaaS.
Business Central Cloud Migration - Previous Release (CA)	Microsoft	Enables data migration from the previous version of Dynamics BC (n-1) to the current release of Dynamics 365 Business Central SaaS.
Business Central Intelligent Cloud	Microsoft	This extension will take you through the process to configure your Cloud Migration environment.
Ceridian Payroll	Microsoft	The Ceridian Payroll functionality allows you to import payroll transactions from Ceridian HR/Payroll (US) and Ceridian Powerpay (Canada).
DIOT - Localization for Mexico	Microsoft	Easily configure and create DIOT file.
Dynamics GP History SmartLists	Microsoft	This extension will allow you to query your Dynamics GP history data with your Dynamics 365 Business Central cloud tenant.
Dynamics GP Intelligent Cloud	Microsoft	This extension will allow you to set up data migration from your Dynamics GP companies to your Dynamics 365 Business Central tenant through a wizard.
Envestnet Yodlee Bank Feeds	Microsoft	Envestnet Yodlee Bank Feeds enables you to process payments and reconcile bank accounts faster and safer.
Essential Business Headlines	Microsoft	Essential business headlines draw facts out of your data. Your people draw the conclusions.
French language (Canada)	Microsoft	This application adds the French language (Canada) to Dynamics 365 Business Central
Image Analyzer	Microsoft	Analyze images using Microsoft Cognitive Services.
Intelligent Cloud Base	Microsoft	This extension will take you through the process to configure your Cloud Migration environment.
Late Payment Prediction	Microsoft	Predict whether payments for sales will be on-time.
Microsoft Pay Payments	Microsoft	The Microsoft Pay Payments service adds a Microsoft Pay Payments link to your sales documents so customers can easily pay using Microsoft Pay Payments. From inside Dynamics 365 Business Central you can send the documents by email.
PayPal Payments Standard	Microsoft	PayPal Payments Standard adds a PayPal link to your sales documents so customers can easily pay using PayPal. From inside Dynamics 365 Business Central; you can send the documents by email.
QuickBooks Data Migration	Microsoft	Enables users to migrate their Customers, Vendors, Items and Accounts and open transactions from QuickBooks to Microsoft Dynamics 365 Business Central.
Quickbooks Payroll File Import	Microsoft	The Quickbooks Payroll File Import functionality allows you to import payroll transactions from a Quickbooks IIF file.
Sales and Inventory Forecast	Microsoft	Get insights about potential sales and a clear overview of expected stock-outs.

Apps available on Sparkrock 365

U.S. installations

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Installed by default		
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Core Application	Sparkrock	Core Application (US)
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Send remittance advice by email	Microsoft	Allows to send remittance advice to vendors by email
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System Application	Microsoft	Provides a standard set of capabilities that serve as a foundation for developing business apps.
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Image Analyzer	Microsoft	Analyze images using Microsoft Cognitive Services.
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Late Payment Prediction	Microsoft	Predict whether payments for sales will be on-time.
Microsoft Pay Payments	Microsoft	The Microsoft Pay Payments service adds a Microsoft Pay Payments link to your sales documents so customers can easily pay using Microsoft Pay Payments. From inside Dynamics 365 Business Central you can send the documents by email.
PayPal Payments Standard	Microsoft	PayPal Payments Standard adds a PayPal link to your sales documents so customers can easily pay using PayPal. From inside Dynamics 365 Business Central; you can send the documents by email.
QuickBooks Data Migration	Microsoft	Enables users to migrate their Customers, Vendors, Items and Accounts and open transactions from QuickBooks to Microsoft Dynamics 365 Business Central.
Quickbooks Payroll File Import	Microsoft	The Quickbooks Payroll File Import functionality allows you to import payroll transactions from a Quickbooks IIF file.
Sales and Inventory Forecast	Microsoft	Get insights about potential sales and a clear overview of expected stock-outs.