

Sparkrock 365

Summer 2020

September 2020

Sparkrock Inc.

SPARKROCK 

Sparkrock 365's Summer 2020 release introduces exciting new functionality. In this guide, you will discover the most important things about this release.

Revision History

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

Revision	Date	Description
01	October 2020	The Sparkrock 365 Summer 2020 release is now supported on Microsoft Dynamics 365 Business Central 16.5. All references in this document to Microsoft Dynamics 365 Business Central 16.3 were updated to Microsoft Dynamics 365 Business Central 16.5.
00	September 2020	Initial version.

Top things to know

This release completes the implementation of Expenses and Claims in Sparkrock 365. Key additions include support for unassigned expense lines and the import of purchasing card lines. mySparkrock now supports the budget checking collapsible section for Expense Claims, based on your solution setup and User Profile. Distance (a.k.a. Mileage) expenses are significantly enhanced. Expense Type Price Lists allow prices to change based on specified starting dates.

Highlights

Platform

- Microsoft Dynamics 365 Business Central updated from 16.0 to 16.5.
- The Sparkrock 365 role centers provide links for direct access to mySparkrock, and a link back to Sparkrock 365 is provided on mySparkrock.
- Sparkrock 365 Role Centers are available from the Role Explorer.

Finance and Procurement

Requisitions Management

- [Email Improvements](#) for Purchase Requisitions and Payment Requests
- [Expense Type Analysis Report](#)
- [Expense Type Price List](#)
- [Purchase Invoice List](#): Attachments and Links in FactBox pane

Expense Claims

- [Unassigned Expense Lines](#)
- [Budget Checking](#)
- [Purchasing Cards](#)
- [Distance \(Mileage\) Changes](#)
- [Expense Approvers](#) visible on mySparkrock
- [Policy Warnings](#)
- [Expense Claim Archives](#)
- [Expense Claim Employee Print View](#)
- [Approved Claims Cue](#) on Accounts Payable Coordinator Role Center

HR Management

- Workflow improvements for Absence Requests in *Pending Review* status.
- Data can be imported directly to the **Compensation Journal** through a new import template.
- Vacation allowances that can increase automatically after a specified number of years of service.
- One-Time Payment reason types were added to the **HR Request Worksheet**.
- Payment of allowances in a period when no salary was earned by an employee.

Scheduling and Time Entry

Scheduling

- [Absence integration with scheduling](#) including significant changes and improvements from the Sparkrock 2016 implementation.
- When processing **HR Requests** to terminate or transfer an employee, the employee will be removed from any assigned schedule units.

Time Entry

- More granular line selection on the mySparkrock **Timesheet Admin** page.
- Improvements to the mySparkrock data entry process.
- Implemented a cap on banking Lieu Time (a.k.a. Comp Time) that can be entered through Time Entry.

Upgrade considerations

Purchasing Cards

Purchasing Cards are no longer associated with a user on the mySparkrock User Card. A new table, Purchasing Cards, is used to specify the relationship between mySparkrock users and Purchasing Cards. The mySparkrock User Card field is obsolete. Data is not automatically migrated from the mySparkrock User Card to the Purchasing Cards page, the information must be set up manually.

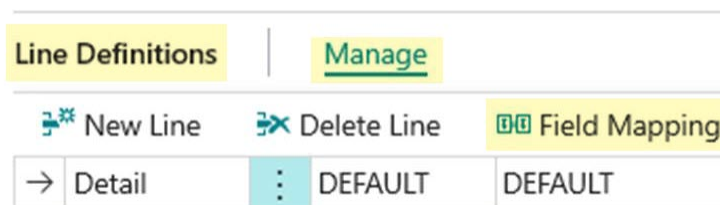
Import Template changes

The import template for Sparkrock Cheque Import has been updated. The change clears temporary data created by the data exchange for this import. You must download and import the new XML template from the [Bank Statement Import](#) article on the Sparkrock Success Center.

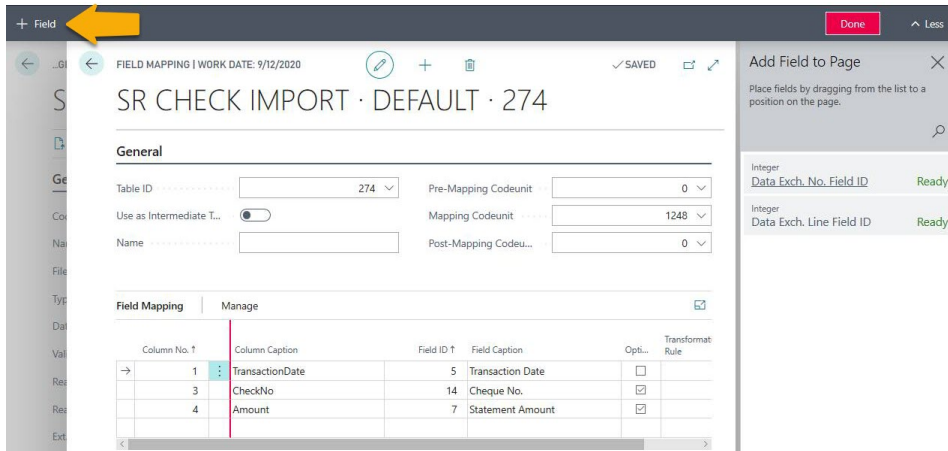
If you have a customized data exchange, you must manually configure the codeunits.

Manually configuring the Field Mapping codeunits

1. Go to **Data Exchange Definitions**.
2. **Open** the check import (default name: *SR Check Import*).
3. Go to **Line Definitions**, then choose **Manage, Field Mapping**.



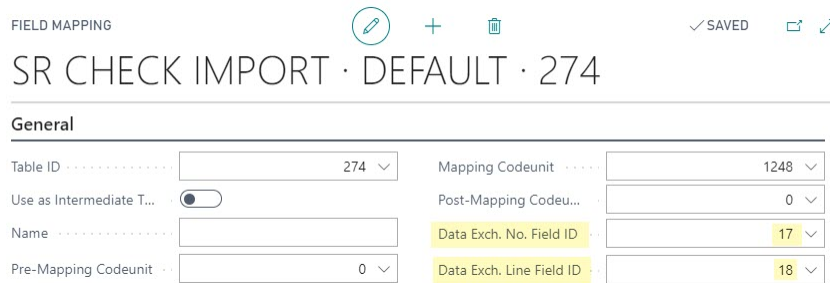
4. Personalize the page to add the two available hidden fields:



To add a field, choose the **+ Field** action.

From the **Add Field to Page** pane, drag and drop each field into the General FastTab.

5. Add the value 17 to **Data Exch. No. Field ID** and
Add the value 18 to **Data Exch. Line Field ID**



6. Your changes are saved automatically. After making these changes you can exit the page.

Scheduling/Absence integration

A new HR function has been added to remove Schedule Unit Employee records when an Employee is Terminated or Transferred. Customers that use standard data should use the **Load Standard Data** action from the **HR Reason Codes** list to reload all functions, including the new one. Customers that have customized the HR Reason Codes should add the new function manually, if required.

Upgrading from Sparkrock 2016

With this release the Upgrade ToolKit (UTK) for converting Sparkrock 2016 HR Management is available, including conversion of Scheduling and Attendance data. Every effort has been made to ensure that key historical data for scheduling and absences is properly converted. However, the Absence Management Integration to Scheduling is complex, and the underlying mechanisms of both scheduling and attendance management are significantly different than they were in Sparkrock 2016. Sparkrock is not able to test all the scenarios that may come into play. Sparkrock recommends that customers using the UTK to transfer this data from Sparkrock 2016 set aside testing resources to specifically focus on this area and to work with Sparkrock to investigate and resolve any discrepancies that may arise.

Terminology

Commitment and Encumbrances

- Purchase Commitments were renamed to *Encumbrances* to reflect current terminology. Tables, procedures, and page actions were adjusted accordingly. The previous term *Pre-Commitments* has now been changed to Commitments.

Purchasing Card

- The term *Purchasing Card* is now used instead of [Corporate] “Credit Card,” the term previously used in Sparkrock 2016.

Core Product

- The term “*core product*” distinguishes between the mySparkrock web interface and the one which includes and extends Microsoft Dynamics 365 Business Central. The latter is referred to as the “*core product*” for brevity’s sake.

Absence re-sequencing

- *Absence re-sequencing* refers to the situation where a change to the set of requested absences, or to scheduling, can trigger the reprocessing of previously approved, future-dated absence requests. This ensures that attendance plan balances are consumed in the correct order, and that negative balances are not created for attendance plan lines where they are not allowed.

A new absence request could be made, to take place sooner in time than another, previously approved absence for the employee. That is, the new request may take place on the calendar before other requests that were previously approved and processed. This is more common when employees are required to register absence requests well in advance of the desired absence periods. In such a case, the new request and all absence requests with later calendar dates than the new request are reprocessed, so that they use up attendance balances in proper chronological order, and negative balances are not created (unless permitted by the plan).

Cue

- In the notes below some explanations refer to a 'cue' on a Role Center. A cue provides a visual representation of data, such as the FTE totals for active employees and employees on leave in the image below. Cues are interactive, meaning that you can click on a cue to drill down to see more details, such as a list page, where you may be able to take actions such as performing approvals.



New Capabilities in Detail

Platform

The base Microsoft Dynamics 365 Business Central platform¹ which powers Sparkrock 365 has been updated from 16.0 to 16.5.

The Sparkrock 365 role centers provide links for direct access to mySparkrock, and a link back to Sparkrock 365 is provided on mySparkrock.

Sparkrock 365 Role Centers are available from the Role Explorer. An exception is the Department Manager role center, which should only be used with the associated license.

¹ A cumulative [list of significant changes](#) is provided by Microsoft.

Finance and Procurement

Fixed Asset improvements

- Additional changes were made in support of the reclassification of pooled assets.

Requisitions Management

Purchase Invoice List

- Attachments and Links can be reviewed in the FactBox pane.

Emailing Purchase Requisitions and Payment Requests

- Support disabling the email action for Manager Users.
- Allow the user to change the *To* email address, for example when sending the document internally instead of to the vendor.
- Support CC'ing the requester on all email requests. This is a toggle on **Purchases & Payables Setup** on the **Finance Requests** FastTab.
- Allow email reminders about reviewing and processing approval requests, to ensure timely processing of documents.
- Notify approvers in an approval group when another user at the same level approves the document, so they no longer must review the request.
- Send an email message to the finance document requester or creator when an *Open* request is cancelled.

Expense Claims

In this release of expense claims, additional capabilities have been added:

Expense Claim Archives

Enables an accounts payable coordinator to review prior years' expense claim history to provide information to auditors or staff upon request. It can be found via **Tell Me** or on the **Accounts Payable Coordinator Role Center** under **Posted Documents**.

Expense Type Analysis report

The new **Expense Type Analysis** report can be used to analyze the distance (mileage) balance per employee per calendar year for tax and audit purposes or to provide detailed data per employee as required. The report is available through **Tell Me** and on **Accounts Payable Coordinator Role Center** under **Reports**.

Approved Claims cue

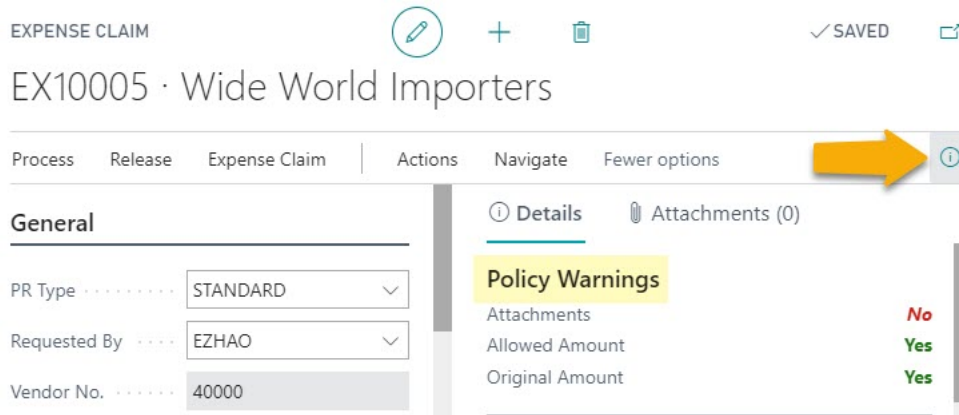
An **Approved Claims** cue was added to the **Accounts Payable Coordinator Role Center**.

The screenshot shows the 'Accounts Payable' role center dashboard. At the top, there are navigation tabs: 'Vendors', 'Purchase Requisitions', 'Payment Requests', 'Expense Claims', and 'A/P Batches'. Below these are sections for 'ACTIVITIES' and 'PAYMENTS'. The 'PAYMENTS' section contains five cards: 'PURCHASE DO... DUE TODAY' (192), 'VENDORS - PA... ON HOLD' (1), 'PURCHASE RE... ORDERS' (2), 'OPEN A/P BATCHES' (46), and 'PAYMENTS PE... APPROVAL' (1). Below this are sections for 'VENDORS', 'MY USER TASKS', and 'REQUESTS'. The 'REQUESTS' section contains four cards: 'NEW VENDOR REQUESTS' (32), 'PENDING USER TASKS' (0), 'APPROVED PA... REQUESTS' (23), and 'APPROVED CLAIMS' (5). A yellow arrow points to the 'APPROVED CLAIMS' card.

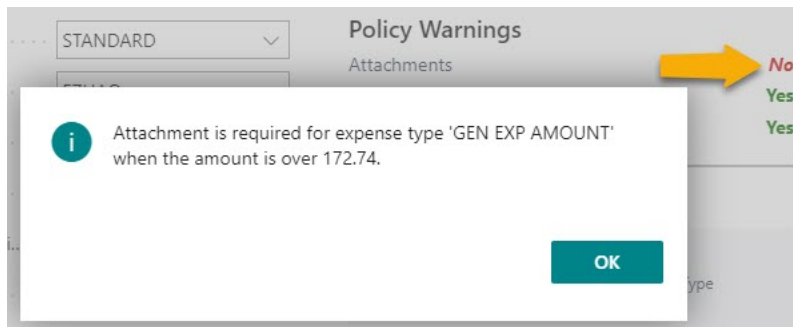
Category	Metric	Value
PAYMENTS	PURCHASE DO... DUE TODAY	192
PAYMENTS	VENDORS - PA... ON HOLD	1
PAYMENTS	PURCHASE RE... ORDERS	2
PAYMENTS	OPEN A/P BATCHES	46
PAYMENTS	PAYMENTS PE... APPROVAL	1
REQUESTS	APPROVED CLAIMS	5

Policy Warnings

The Accounts Payable Coordinator can review policy warnings on expense claims. From the **Expense Claims** list, select and open a Claim document, and expand the FactBox pane, if necessary. A **Policy Warnings** panel is displayed.



Choose any red indicator to open a details dialog explaining the issue(s).



Total Distance

Total distance (a.k.a. mileage) entered year to date is displayed on an expense line in mySparkrock. date (The expense line date determines whether the current or prior year total is displayed. Previous or future year’s totals are not displayed.) In the core product, **Distance Details** are displayed in the FactBox on a claim document and as a pair of cues on the **mySparkrock User Setup Card** FactBox pane.

The screenshot shows a FactBox for a claim document. On the left, under 'Distance Details', there are two rows: 'Total Distance (Current Year)' with a value of 400.00, and 'Total Distance (Last Year)' with a value of 0.00. On the right, under 'EXPENSE DETAIL', there is a search field for 'Type*' with 'Mileage, Internal' entered, and a yellow highlight below it showing 'Total Distance: 300'.

Distance details on the core product claim and on mySparkrock

The screenshot shows the 'mySparkrock User Setup Card' FactBox for user 'MFRIDAY'. The 'Finance and Procurement' section contains a grid of metrics. A yellow arrow points to the 'Total Distance (Current Year)' metric, which has a value of 400.00. Other metrics include 'Requests Created' (2), 'Requests Approved' (0), 'Requests Awaiting Approval' (0), 'Total Distance Unassigned (Current Year)' (120.00), and 'No. of Purchasing Cards' (0).

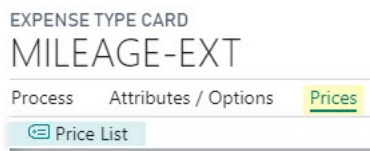
Finance and Procurement		
2	0	0
Requests Created	Requests Approved	Requests Awaiting Approval
400.00	120.00	0
Total Distance (Current Year)	Total Distance Unassigned (Current Year)	No. of Purchasing Cards

Distance details on the mySparkrock User Setup card

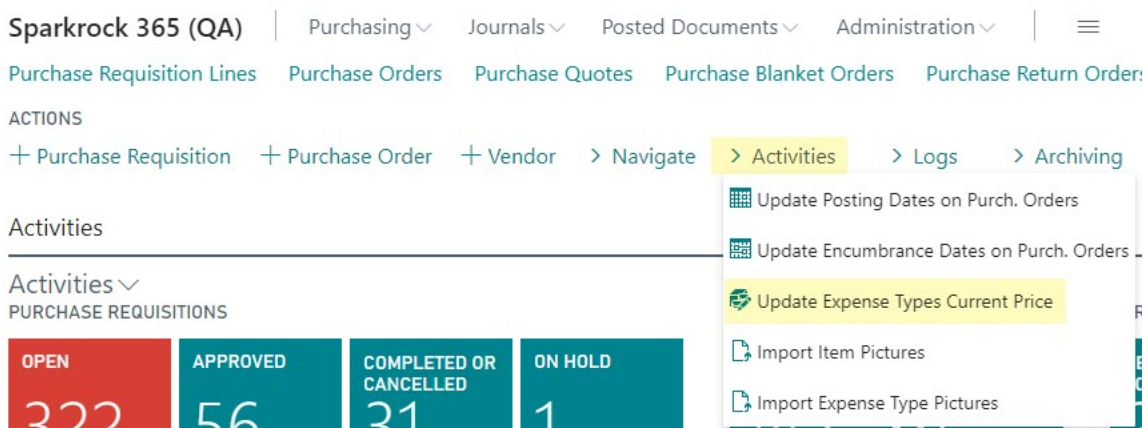
Price and Rate changes

For all expense types you can specify a **Price List**, so that different prices take effect on specific dates. A Price List is specific to an **Expense Type**, that is, one price list cannot be used for multiple Expense Types. For *Distance* (mileage) types, you can specify a second rate that takes effect when the **Mileage Rate Threshold** (specified on **Purchase & Payables Setup**) for the calendar year is reached. For example, there may be a legislative requirement that one rate be used for accumulated mileage below 5,000 and a higher rate be used when that threshold is reached.

A Price List is not required. If the Price List for an Expense Type is empty, the **Unit Amount** from the Expense Type (which may be 0) is used. The Unit Amount is also used for any expenses dated prior to the earliest **Starting Date** on the Price List. To set or review the Price List, from an Expense Type, choose **Prices, Price List**.



A job queue can be configured to ensure that the Current Unit Amount is adjusted based on the Price List. The corresponding report can also be run manually from the **Purchasing Agent Role Center**, under **Activities, Update Expense Types Current Price**.



The mySparkrock Expense Types selection list will show the current **Amount**.

mySparkrock Expenses and Claims features

Unassigned expenses

Unassigned expenses are lines not yet attached to a claim. You can choose to enter lines as you incur expenses but hold them until you are ready to file a claim (for example, at the end of a month). Expense lines may also be associated with your user through data import, typically for a company purchase card (see below).

Budget collapsible section

If enabled on your solution and your mySparkrock User Profile, you can expand this section to review Budget information. You can review how your expenses will impact available budget, and what other commitments and encumbrances are entered against the same budget.

Approvers collapsible section

Once a Claim is submitted, the requester can view the status of the approval process, including which Approvers have approved, and which approvals are pending, by opening a collapsible section on the Claim.

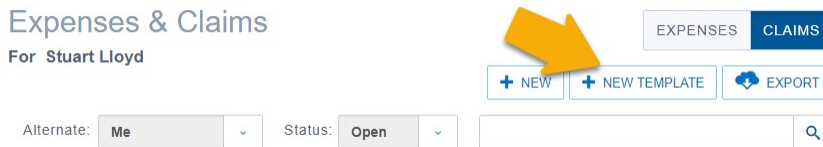
Note: the Approvers section is not visible when the claim is being created (in *Open* status) as the approvers are determined upon submit, based on business rules.

Account Sets

Account Sets are supported to populate dimensions on Expense Lines. G/L Account will also be populated if included in the Account Set. Subsequent changes to individual dimensions are validated against the account set. If a change creates a combination of dimensions without a matching Account Set, you will not be able to successfully save the expense line. You can clear out the Account Set field to correct this and save the line.

Private Templates

If there is a type of claim that you make frequently, you can create a personal template for it, so that you can easily create new claims that contain the common information. Create a Private Template using the **+ New Template** button on the Claims list.



Note: The process is different than it was in Sparkrock 2016 / Employee Center. You cannot create a template from an existing claim.


To create a new Claim from the template, open it and use the **+ New Claim** button. A new Claim document will open with a copy of the information from the template.



Copy Claim

You can copy an existing claim to start a new claim with a new document number. Dates and audit information are recalculated. Purchasing card lines will not be copied. Copying an Expense Claim template will also start a new claim (you cannot copy an Expense Claim template to create another template).

Copy Expense Line

You can copy a single expense line on the unassigned expenses list. Use the  **Copy** button in the **Action** column. The Copy (and Delete) actions are not available for Purchasing Card lines.

<input type="checkbox"/>	DATE	TYPE	DETAILS	ATTACHMENT	AMOUNT	ACTION
<input type="checkbox"/>	07/15/2020	Greeblies	Test of receipt threshold	 1	19.98 CAD	 
<input type="checkbox"/>	07/15/2020	Greeblies	Many more greeblies! I am outfitting an entire legion of my best troops for the Forest Moon of Endor!	 1	549.45 CAD	 

A new copy of the Unassigned Expense will open. Make any desired changes and save the line.


You can **duplicate** any expense line (other than purchasing card lines) on a claim document. Hover your cursor over the desired line to reveal the available actions.



- EXPENSES NEW UNASSIGNED EXPENSE


01

Greeblies

ADM; MEDIUM; 000; 00; 0001

 Edit

 Duplicate 

 Delete

A new expense line will appear at the bottom of the Expenses collapsible section. Hover over the new line and use **Edit** to make any desired changes.

Other minor changes

- The **Export to Excel** action was added to the Claims page.
- Expense Claim Employee Print View
A simplified Print View for employees, without dimension details, was added.

Purchasing Cards (formerly credit card import)

- Purchasing card import allows you to import transactions from your card provider into your Sparkrock solution. See the [Sparkrock Success Center](#) for full details.

Purchasing Cards have changed from Sparkrock 2016 in the following ways:

- You can map your Purchasing Card provider's file format directly to the import fields, eliminating the need for data transformation.
- You can have a different import format per vendor.
- The import is loaded into a journal and checked for duplicates.
- You can revert a processed import if none of the unassigned expenses have been pulled into a claim.
- You can reassign a purchasing card to another user. All open unassigned expenses that go with this card can be reassigned to match.
- Users can be associated with multiple Purchase Cards.

HR Management

Absence Requests

Absence Requests have a new *Pending Review* status, used when a recalculate puts the request into a negative state. Various pages were updated to support workflows related to this new status. The mySparkrock Absence calendars display the new status using its own color. On mySparkrock, Employees and/or Managers can reopen or cancel an absence request that requires review.

Compensation

Added the ability to import data directly to **Compensation Journal** through a new import template. Import includes the ability to set an allocation account set that can differ from the assignment allocations. The **Import from Template** action is available on the **Process** menu for the Compensation Journal Line table. On a successful import data is populated into the Compensation Journal Line table and into the Comp. Line Allocation Table. Robust error messages enable you to correct any problems with the import data.

Vacation allowances can be configured with rates that will increase after a certain number of years of service.

Compensation Journal was enhanced to allow **Load Standard Units** for Per Diem Assignments. This replaces and extends the previous Load Standard Hours option. A new toggle on the **HR Position** card, **Calculate Standard Units**, specifies whether standard hours or days should be added to the Compensation Journal for this HR Position. This feature applies only to assignments with **Pay Type** of *Hourly* and *Per Diem*.

Payroll

Payroll processing supports the payment of Allowances in a period when no salary was earned by the employee.

Scheduling and Time Entry

Scheduling

Integration to Absence Management

The integration between absence management and scheduling is redesigned for Sparkrock 365. Among other changes, this redesign eliminates multiple absence requests when an employee’s initial absence request spans multiple shifts. This aids employee understanding and improves processing efficiency. The new approach updates the quantity of the absence request when it is approved, applies sequencing, and updates the employee-assigned shifts to reflect the absence. In the core product you can now see the shifts that are affected by the absence request:

ABSENCE REQUEST
A0000538

Process Request Approval More options Prior to approval

General Show more

No.	<input type="text" value="A0000538"/>	Registration Status	<input type="text" value="Open"/>	Warning 1	<input type="text"/>
Employee No.	<input type="text" value="E0328"/>	Cause of Absence Code	<input type="text" value="SICK SCH"/>	Warning 2	<input type="text"/>
Employee Name	Gwenlyne Weekdays	Description	Sick for Scheduling	Warning 3	<input type="text"/>
From Date	<input type="text" value="2020-09-01"/>	Quantity	<input type="text" value="0.00"/>	Line Shift	<input type="text" value="0"/>
To Date	<input type="text" value="2020-09-04"/>	Unit of Measure	<input type="text" value="HOUR"/>		
Status	<input type="text" value="Open"/>	Days	<input type="text"/>		

Quantity not yet calculated

Employee's shifts during the request period

Shift Details		Open Shift Card									
Unit Code	Work Date	Workday	Employee Position Code	Employee Position Name	Start Time	End Time	Duration	Status	Overn... Shift	Abse...	Trainl...
→ TRADETEST1	2020-09-02	Wednesday	SRSEC10M-ALX	Senior Secretary - 10 Month	10:45:00 AM	2:45:00 PM	4.00	Published	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRADETEST1	2020-09-03	Thursday	SRSEC10M-ALX	Senior Secretary - 10 Month	10:45:00 AM	2:45:00 PM	4.00	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRADETEST1	2020-09-04	Friday	SRSEC10M-ALX	Senior Secretary - 10 Month	10:45:00 AM	2:45:00 PM	4.00	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ABSENCE REQUEST

A0000538

After approval

Process Request Approval More options

General

Show more

No.	A0000538	Registration Status	Open	Warning 1	
Employee No.	E0328	Cause of Absence Code	SICK SCH	Warning 2	
Employee Name	Gwendolynne Weekdays	Description	Sick for Scheduling	Warning 3	
From Date	2020-09-01	Quantity	12.00	Days	6
To Date	2020-09-04	Unit of Measure	HOUR		
Status	Approved	Days	4.00		

Quantity calculated based on employee shifts

Employee's shifts become absences

Shift Details | Open Shift Card

Unit Code	Work Date	Workday	Employee Position Code	Employee Position Name	Start Time	End Time	Quantity	Status	Overn... Shift	Absen...	Traini...
TRADETEST1	2020-09-02	Wednesday	SRSEC10M-ALX	Senior Secretary - 10 Month	10:45:00 AM	2:45:00 PM	4.00	Approved	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TRADETEST1	2020-09-03	Thursday	SRSEC10M-ALX	Senior Secretary - 10 Month	10:45:00 AM	2:45:00 PM	4.00	Approved	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ TRADETEST1	2020-09-04	Friday	SRSEC10M-ALX	Senior Secretary - 10 Month	10:45:00 AM	2:45:00 PM	4.00	Approved	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The ability to see the shifts impacted by the absence will be added to mySparkrock in a future release.

If the absence request would create an over-balance situation when negative balances are not allowed, the request will be rejected or reopened if necessary.

When creating schedules based on templates, the absence integration was rewritten to address shortcomings that existed in Sparkrock 2016. In that product, applying a template could produce incorrect results which required the absence requests to be reopened and reapplied. The new design resolves this.

Note: if applying the template would create an absence quantity that forces an employee's absence allocation to go into negative balance, those shifts will not be created.

Absence re-sequencing

Absence re-sequencing (see [definition](#)) can interact with scheduling to affect shift assignments. In particular, if a negative balance would be created (for plan lines where this is not permitted), then a previously approved absence request can be reopened. This in turn can cause the employee to be placed back into future-dated shifts where they had previously been removed. In such a case, notifications are issued and pending shift changes (including pending trades, change requests, and shift absence requests) are cancelled.

To prevent disruption of immediate schedules, a new setting has been added to **Schedule Setup**. In the *General* FastTab, **Absence Request Resequencing Calc. Date** is a date formula field. Future-dated, scheduling-related absence requests that fall within the specified period will NOT be resequenced, so that shift assignment changes during that time period will not result.

That is, only absence requests with a starting date greater than or equal to today's date plus the date formula will be re-sequenced. For example, if the specified date formula is 14D, then shifts within the two-week period from the current date will not be changed as a result of resequencing.

For details on how to create a date formula, see [Working with Calendar Dates and Times](#).

Scheduling Absence integration to Compensation Journal

Absences can be sent to the Compensation Journal in one of two ways.

From Scheduling

Similar to Sparkrock 2016, the activities in absent shifts can create Compensation Journal lines to drive payroll.

From Absence Requests

Instead of being driven by the absent shift activities, the absence requests linked to scheduling can flow directly to payroll. An **HR Pay Code** must be set up on the **Cause of Absence**, and the Schedule Unit Activity for the absence must have **Do Not Send Hours to External Payroll** checked. The absent shifts will still be processed and be marked *Posted*, but the activities will not create journal lines or drive payroll.

Note: If an HR Pay Code is set up on the Cause of Absence, and the Schedule Unit Activity for the absence does not have Do Not Send Hours to External Payroll checked, then both the absence request and the absent shift activities will create Compensation Journal Lines that will drive payroll calculations. Should this occur, it will need to be corrected manually. Delete the duplicate lines and correct the configuration accordingly.

Other changes

When processing **HR Requests** to terminate or transfer an employee, the employee will be removed from any assigned schedule units.

When a unit supervisor reviews an absence request, a comment is now mandatory regardless of whether the request is approved or denied.

Time Entry

On the mySparkrock **Timesheet Admin** page, you can now select individual lines per employee to perform an action, instead of all the lines for an employee being processed together.

There is a cap on banking Comp/Lieu Time through **Time Entry**, based on the maximum balance set on the **Cause of Absence** on the **Entitlement** FastTab. When time sheet entries are submitted, if any lines will result in the maximum balance being exceeded an error message is returned and no lines are submitted.

The screenshot shows the configuration page for 'LIEU - Lieu Time'. At the top, it says 'CAUSE OF ABSENCE CARD' with edit, add, and delete icons, and a 'SAVED' status. Below the title are sections for 'Scheduling', 'Totals', and 'Entitlement'. The 'Entitlement' section contains several settings:

- Calculate Entitlement: Do not Calculate
- Maximum Balance: 40.00
- Use Previous Year Ent.:
- Entitlement Type: [Dropdown]
- EOY Carry Forward C...: COA
- Allow Time Bank Tran...:
- EOY Excess Code: [Dropdown]
- Maximum Lieu Time ...: 0.00
- Unlimited Carry Forw...:

Depending on your jurisdiction the field label may be **Max Comp. Time Balance** or **Max Lieu Time Balance**. A value of 0 means “no limit”.

When a Time Entry unit is set up with **mySparkrock Entry Mode** of *Allow Time Entered for Weekends and Holidays* then time can be entered on non-working days, even if the HR calendar specifies them as non-working days.

On the mySparkrock employee **Timesheet** page, added the ability to cancel the approval request for lines that are Pending Approval, so that they can be corrected. The timesheet must be within the range of weeks that currently permit time entry (past and future).

On the mySparkrock employee **Timesheet** page, added the ability to select a specific employee when the unit allows managers to enter time for their direct employees, when *Subordinates* or *Both* are selected as row display options.

On all mySparkrock **Timesheet** pages, changes to a row are no longer saved immediately when you leave an input field. Save and Undo actions appear on the right-hand side of the row when changes to the row's data are outstanding.

Employee	Sun Jul 12	Mon Jul 13	Tue Jul 14	Wed Jul 15	Thu Jul 16	Fri Jul 17	Sat Jul 18	Total	Status
Stuart Lloyd Regular Time	<input type="text" value="0"/>	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value="2.4"/>	<input type="text" value="2.4"/>	<input type="text" value="0"/>	16.8	<input type="button" value="+"/> <input type="button" value="⌂"/> <input type="button" value="✓"/> <input type="button" value="↶"/>
Total								12	

In the core product, on **Time Sheet Entry**, Approved entries can be reopened if not processed by payroll (unless the setting **Auto Approve Back Office Time Entry** is toggled on in **Time Entry Setup**, see [Known Issues](#)).

Performance Improvements

The following Sparkrock 365 pages have improved performance:

- HR Employee Assignment
- Absence Incidents
- Absence Request
- Employee Attendance Plan Entitlements
- HR Categories
- HR Departments
- Position List
- GL Budget Name List
- Project List
- Assignment Types
- Seniority Groups

Defects corrected

Platform

The base Microsoft Dynamics 365 Business Central platform² which powers Sparkrock 365 has been updated from 16.0 to 16.5.

In Sparkrock 365 Role Centers, drill down on charts is now operational.

Irrelevant Microsoft Role Centers could become enabled after an upgrade from earlier versions of Sparkrock 365.

On mySparkrock the user's log in credentials could expire, typically if the user forgot to log out for the day. In this case, the sign in screen will be presented and the user will need to sign in again.

Obsolete mySparkrock pages were removed.

² A [detailed list](#) of cumulative platform fixes is available from Microsoft.

Finance and Procurement

Requisitions Management

Improved the cues on the Role Centers to update in the background so that they stay up to date as documents move through the approval process.

Lines with **Type Resource** can now be added to a **Purchase Order**.

For the Department Manager's **Requests to Approve**, Expense Claims no longer show a blank Sender when the requester is a mySparkrock-only user.

On a new **Purchase Requisition**, when a Department Manager chooses a **PR Type** and uses "Select from Full List" the pop-up dialog will populate with the **Code** and **Description** fields.

Improved the **Navigate, Documents** action to open the most relevant pages.

Fixed a **Purchase Requisition** archive issue that prevented some documents from being archived.

Using the **copy document** action, you can now create a payment request from a payment template.

Account Set information is no longer cleared when selecting **Type** on a **Purchase Order**.

Using the special character '&' in an **Expense Type Category** could cause problems on mySparkrock. This was corrected, however, the use of the special character '&' in any solution codes or key values is *not recommended*, because it is an HTML 'escape code' which causes browsers to process it in a special way.

When the **Purchase & Payables Setup** is configured so that **PR Type Mandatory** is toggled on, **PR Type** must now be entered on a new purchase or payment request before any other data. Once set, **PR Type** then cannot be removed unless and until any existing lines are removed.

Corrected a language caption on the **Purchase Receiving** page under **Process**.

When releasing a **Purchase Order**, the error message "record in table Detailed Encumbrances Entry already exists" could be incorrectly triggered.

For the Manager User, when reviewing **Approval Entries**, the Over-Budget Approval checkbox is now shown.

The Accounts Payable Coordinator can now cancel a claim with *Open or Pending Approval* status.

The Open **Record** action on **Posted Approval Entries** was corrected to open a document card page for Archived finance documents (Expense, Requisition, Payment) based on the document type.

Corrected an issue with the **Get Receipt Lines by Amount** action that could prevent lines from importing into the Purchase Invoice.

Duplicate entries were created for approvers when the **Sequence of Approval** was *Approver then Rules* and a previous sequence was auto-approved.

Acting as an alternate for data entry would allow self-approval when there was no other approver than the alternate, even when self-approval is not permitted. In this case the document cannot be submitted for approval.

A user with multiple roles on the same document would not get an expected email notification in certain situations.

Corrected an issue with email notifications when an Expense Claim was reopened after approval.

Incoming documents

Made the **Confidential** flag available to full users.

Accounts Receivable

When emailing Sales Invoices, a permission error appeared.

Accounts Payable

Corrected an issue when running Vendor Remittances for EFTs, where Application Details were not printing on the Vendor Remittance Statement.

Fixed Assets

When typing to Post a Maintenance Cost (FA Posting Type = Maintenance) for a non-TCA Fixed Asset from a Purchase Invoice, a *Depreciation Book* error would occur.

A permissions issue with the FA Ledger Entry when "Pooled Asset" is checked on the Fixed Asset Card was resolved.

Expense Claims

On mySparkrock, the *Attachment is Required* warning could display when the amount of the claim was below the threshold that requires an attachment.

For *Distance* expenses, the **Round Trip** option was not displayed unless the distance was location-to-location.

Corrected an Alternate-specific issue where security filter exceptions in an account set could be incorrectly used for G/L account outside of the account set.

In mySparkrock, attempting to add a specific attachment to an Expense Claim more than once (attach the same file name again), caused the attachments section of that specific claim to become inoperable. Attachments could not be displayed or deleted.

Corrected an error that could occur when an Expense Claim was submitted from mySparkrock without a Vendor associated with the employee. This condition is permitted, and it will be resolved as part of the approval process.

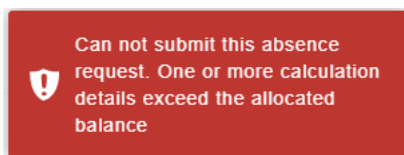
Corrected an issue where values from a User Account Set could be used outside of the Account Set.

HR Management

Absence & Leave Management

Absence Requests

The absence request process has been improved for causes of absence which are set up with **Prevent Negative Balances** turned on. Now an error message will be shown when the user attempts to submit a request that would create a negative balance.



Note: When using sequencing, **Prevent Negative Balances** should only be turned on for the final Cause of Absence in the sequence.

Adjusted the **Mass Register Employee Absences** action so that requests change to *Requires Review* status when an over balance would result. (This does not apply to Causes of Absence linked to Scheduling.)

The Absence Request notification email was updated to improve the **Employee No.** and **Name** and the **To Date**.

Improved the User ID field for **Approval Comments** to show the mySparkrock user ID when an approval comment is entered (typically when a request was denied).

Corrected data display issues in the **Absence Request Approval Entries** including Sender ID and Comment related issues.

mySparkrock issues

- A locale-specific issue on with the time selection component was resolved.
- The Absence Request **Change Sign** function was corrected to work as expected.
- A problem attaching binary files to absence requests was resolved.
- The calculation details now show when an absence request linked to Scheduling is automatically approved.

Employee Management

Setup and Configuration

On HR Task Event Setup, a row cannot be marked Active unless Threshold Type is completed. Rows must be made inactive to change their values.

On the HR Reason Code page, drilling into Default Source Table could produce an error.

The obsolete field *Seniority Hours* was removed from the employee card and attendance integration.

HR Requests

On the **HR Request Worksheet**, the **Effective Date** is used to look up HR Pay Grid / Grade / Step.

When processing a new hire HR Request, in some cases the Contact email address was not transferred to the mySparkrock User Setup.

When processing a termination for an occasional worker (where FTE is 0) or for an employee on leave, corrected an issue that could prevent the HR Request from finding the employee's assignment, resulting in an error during step processing.

HR Request Worksheet

When loading the worksheet, assignments where the related Employee is blocked from payroll will be skipped. A related issue processing a regular *Details Change* for assignments for employees on leave was also resolved. (Note that as of the Spring 2020 release, HR Reason Code *Leave Change* must be used for leave assignments.)

Processing

On Generate/Update Appraisal, the Completed Date is no longer copied to the new record (as this was incorrect).

On the **Progression Worksheet**, corrected the progression calculation to use **Next Progression Date** from the current **HR Employee Assignment** instead of Effective Date from the HR Request when **Progression Method** is set to *Date Threshold*.

Corrected an issue where Record of Employment details were not created when an employee has only Direct deposits information in Payroll Ledger Entry.

Payroll

Corrected a **Compensation Journal** issue that would load lines for hourly employees incorrectly when an Employee Assignment changed or started midway through a pay cycle, causing an overpayment.

Benefit Management

The **OnSIS Position Mapping** page was updated to fix the value lookups for the **Type** columns (Position, Teaching, Department, Instruction).

The **OTIP Export** incorrectly used the employee's personal email address. The company email address is now used by the export.

An issue with importing OTIP payroll deductions where the HR Deductions were not always matched to the correct employee, and thus appeared to be missing, was resolved.

Position Management

An error that occurred when trying to rename an **HR Position Code** was corrected by increasing the allowed length.

Employee & Manager Self-Service

Pay Structure/Grade/Step and Progression details were not shown on the mySparkrock Profile page. (**Note:** Visibility of these fields can be controlled via settings on **Advanced HR Setup**).

On the **Profile** page in the **Admin & Benefits** section the HR Representation information was sometimes blank when there was information to display.

Scheduling and Time Entry

Employee Scheduling

Improved consistency of the *Vacant Shifts by Unit* data in charts and FactBoxes to ensure they filter on the same time periods.

Resolved an error that could occur on the Sparkrock 365 core product when adding activities to a shift.

A locale-specific issue on mySparkrock that prevented employees from creating shifts when using Microsoft Edge was resolved.

A mySparkrock error when bidding on a Vacant shift was resolved.

The Consecutive Days Warning now works as expected.

Some issues with the content and links in Scheduling email notifications were corrected.

Time Entry

Core product

On **Time Sheet Entry**, the **Navigate, Employee, Assignments** action was moved to the **Time Lines** subpage. As **Navigate, Assignment**, it opens the assignment for the currently selected line.

Data issues could be introduced if an active **Time Entry Unit** were renamed, as the rename was not propagated through all related records. This could manifest as a problem approving any existing records. The issue has been corrected.

On **Time Entry Unit Positions** the size of the **HR Pay Cycle Code** field was increased to resolve a validation error that appeared when the selected code had more than 10 characters.

Removed the column **Last Modified by User ID** from the Time Entry Approvals Entries list, as it contained internal system IDs and was redundant with other columns.

Corrected the **Time Sheet Entry** page's **Display Mode** so that an approval administrator can choose the Me option to see only their own data entry rows.

mySparkrock

On all Timesheet pages, selected time entry rows are cleared when the top-of-page filters are changed. Without this change, previously selected rows could still be counted on the Submit button's line count.

On all Timesheet pages, the **Sign Out** button is now available.

On the **Time Sheet Admin** page, when using FireFox, data entered might not be saved.

On the **Time Sheet Admin Monthly** page, corrected an issue that could cause the weeks to present out of the expected calendar sequence.

On the manager's **Timesheet Approvals** page, Time Entry units for which the manager is part of an Approval Group are now available in the unit selection drop-down.

On the manager's **Timesheet Approvals** page, lines where the Manager is configured as *Notification Only* are not shown.

On all Timesheet entry pages, if an employee's assignment starts or ends mid-week, only the days in the assignment period allow data entry.

On all Timesheet entry pages, the Cancel and/or Submit buttons will be disabled when there are no selected lines for which this action is applicable.

On the **Timesheet** entry page, corrected an issue that could cause unselected lines to be submitted for approval.

On all Timesheet entry pages, added an error message to the comment entry dialog if a comment is longer than the maximum of 250 characters.

Known Issues

Finance and Procurement

The **FA Posting Group** card is unresponsive when opened and cannot be used to set the account values. This is a known problem in the platform. As a workaround, you can enter the values directly on the **FA Posting Groups** list page.

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

The very first time a user opens the Expense Type list on an expense line, the dialog may open with no lines shown. This can happen if the expense types have not finished loading into the application's data cache. Simply close the dialog and open it again and the expense types will appear.

On the **Chart of Accounts**, the **Budget Available** column does not include *Commitments* in the calculation. This will be addressed in a future release.

On an **Expense Claim** (core product), **Gross Unit Cost** is not populated for distance (mileage) lines.

HR Management

Attendance Management

On mySparkrock, for an Absence Request linked to scheduling, the To Date and From Dates may not display after the Submit action. This is a refresh issue; the dates remain correctly associated with the absence request. This will be addressed in a future release.

Payroll

When using the platform security filters on permission sets, the **Payroll Employee** and/or **Payroll Processing** 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 needs to access these pages.

For paycheck processing, the use of graphics (typically logo(s) and/or signatures) can cause noticeable performance issues. When paychecks are printed in large batches, it may be necessary to use a custom check report to work around this issue.

The toggle **Allow Multi-Company Fed./Prov. Withholding Setup** on the *Canadian Setup* FastTab of the **Additional Payroll Setup** page must **NOT** be turned on in this release.

Scheduling and Time Entry

Scheduling

When cancelling an Absence linked to Scheduling, in a unit with more than one designated unit supervisor, the **Restore** action on a filled shift can fail with a message related to email recipients. This will be corrected in a future release.

Time Entry

When Time Entry lines are sent for approval in the core product **Time Sheet Entry** page, if the setting **Auto Approve Back Office Time Entry** is toggled on in **Time Entry Setup**, the lines cannot be reopened for update or correction. This gap will be addressed in a future release.

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, the unsaved lines may be discarded without a warning.

Appendices

Apps available on Sparkrock 365

Canadian installations

US installations

Sparkrock Feature Comparison Charts

Platform

Finance and Procurement

HR Management

Payroll Administration

Schedule and Time Entry

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		
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 can 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

Summer 2020

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.

U.S. installations

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Sales and Inventory Forecast	Microsoft	Get insights about potential sales and a clear overview of expected stock-outs.

Sparkrock Feature Comparison Charts

Platform Improvements

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
mySparkrock Platform Management	Sparkrock 2016	Sparkrock 365
User Management	✓	✓
Microsoft SharePoint	✓	Discontinued
Basic (Form Based) Authentication	✓	Discontinued
Azure AD	✓	✓
Windows ID	✓	Discontinued
OAuth (Google Gmail API)— Sparkrock Cloud Only	X	✓
Sparkrock 365 Platform	Sparkrock 2016	Sparkrock 365
Application Area Management	X	✓
Multi-Language Support	Sparkrock 2016	Sparkrock 365
French Language Support (Core Product)	✓	Planned
French Language Support (mySparkrock)	✓	Planned
Microsoft Functionality	Sparkrock 2016	Sparkrock 365
Usability	✓	✓
Power BI	X	Planned
Outlook Integration	X	✓
Predictive Automation and AI	X	Planned
Security	✓	✓
Excel Integration	✓	✓
Personalized Views and Designs	✓	✓
Saved Filter Views	X	✓
User Tasks	X	✓
Web Client (Cloud)	✓	✓

Finance and Procurement

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
Accounting Manager	✓	✓
Purchasing Agent	✓	✓
Accounts Payable Coordinator	✓	✓
Account Receivable Administrator	✓	✓
Department Manager	✓	✓
Security Administrator	✓	✓
Accounts Payable		
	Sparkrock 2016	Sparkrock 365
A/P Batches	✓	✓
Fixed Asset No.	✓	✓
Get PO Lines	✓	✓
Vendors	✓	✓
Purchase Invoicing	✓	✓
Tax Rounding	✓	✓
Payment Journals	✓	✓
Electronic File Transfer (EFT)	✓	✓
Printing Checks	✓	✓
Vendor T4As	✓	✓
Misc. Vendors	✓	✓
Get Receipt Lines (4 options)	✓	✓
Vendor Certifications	✓	✓
Accounts Receivable		
	Sparkrock 2016	Sparkrock 365
Customers	✓	✓
Sales Invoicing	✓	✓
Word Layout	✓	✓
Customer Statement	✓	✓
Emailing	✓	✓

Asset Management	Sparkrock 2016	Sparkrock 365
Fixed Assets	✓	✓
Depreciation Calculations	✓	✓
Budget Management	Sparkrock 2016	Sparkrock 365
Budget Structure and Creation	✓	✓
Budget Journals	✓	✓
Budget Journals Attachments	✓	✓
Budget Journals Workflows	✓	✓
Budget Checking (Purchase Documents)	X	✓
Budget Journal Imports	✓	✓
Over-budget Approvals (Finance Requests)	✓	✓
Cash Management	Sparkrock 2016	Sparkrock 365
Deposits	✓	✓
Cash Receipting (Sparkrock Functionality)	✓	✓
Deposit Tax Receipting	✓	✓
Bank Reconciliation	✓	✓
Import Bank Statement	✓	✓
Import Cleared Checks	✓	✓
Donor Management	Sparkrock 2016	Sparkrock 365
Donor Management	✓	Discontinued
Expense Claims	Sparkrock 2016	Sparkrock 365
Expense Claims Entry (mySparkrock)	✓	✓
Finance Approval (mySparkrock)	✓	X
Finance Approval (Core Product)	X	✓
Expense Claims Processing to Accounts Payable	✓	✓

Financial Analysis	Sparkrock 2016	Sparkrock 365
Data Sets	✓	✓
Attach Data Sets to mySparkrock User Profile	X	✓
Financial Analysis (mySparkrock)	✓	X
Financial Analysis (Core Product)	X	Planned
General Ledger	Sparkrock 2016	Sparkrock 365
Chart of Accounts and Dimensions	✓	✓
Dimension Validation	✓	✓
Reporting Dimensions	✓	Discontinued
Workflows	✓	✓
General Journal	✓	✓
Recurring General Journal	✓	✓
Fund Accounting	✓	✓
Standard Reporting	✓	✓
Inventory Management	Sparkrock 2016	Sparkrock 365
Items	✓	✓
K12 Reporting Package	Sparkrock 2016	Sparkrock 365
K12 Reporting Package (Finance)	✓	Planned
Payment Requests	Sparkrock 2016	Sparkrock 365
Payment Request Entry (mySparkrock)	✓	X
Payment Request Entry (Core Product)	X	✓
Finance Approval (mySparkrock)	✓	X
Finance Approval (Core Product)	X	✓
Payment Requests Processing to Accounts Payable	✓	✓

Project and Grant Accounting	Sparkrock 2016	Sparkrock 365
Project and Grant Accounting	✓	✓
Purchasing	Sparkrock 2016	Sparkrock 365
Budget Commitments	✓	✓
Charts	X	✓
Commitments and Dates Update Reports	✓	✓
Number Series Setup	✓	✓
Purchaser Code Filter	✓	✓
Purchase Orders	✓	✓
Purchase Requisitions	✓	✓
Print Layouts (Word and RDLC)	✓	✓
Order Address list page	✓	✓
Emailing	✓	✓
Receiving (Back Office)	✓	✓
Requisition Management	Sparkrock 2016	Sparkrock 365
Application Area Management	X	✓
Delegates	✓	✓
Department Manager Role Center	X	✓
Requisition Setup Expense Types	✓	✓
Requisition Entry (mySparkrock)	✓	X
Requisition Entry (Core Product)	X	✓
Finance Approval (mySparkrock)	✓	X
Finance Approval (Core Product)	X	✓
Requisitions Processing to Purchase Orders	✓	✓
Requisitions Processing to Quotes	✓	Planned
Email Reminders	✓	✓ NEW
Requisition History	✓	Planned
Requisition Date Tracking	X	✓
Templates	✓	✓
Online Receipts	✓	✓

Budget Checking Visibility Options	✓	Planned
Open Related Documents from Budget Checking Details	✓	Planned
Dimension Cascading from list of Account Sets	✓	Discontinued
View Purchase Orders (mySparkrock)	✓	X
View Purchase Orders (Core Product)	X	✓
Online Receiving (mySparkrock)	✓	X
Purchase Receiving (Core Product)	X	✓
View Purchase Invoices (mySparkrock)	✓	X
View Purchase Invoices (Core Product)	X	✓
Upgrade Toolkit (Sparkrock 2016 to Sparkrock 365)	Sparkrock 2016	Sparkrock 365
Upgrade Toolkit	X	✓

HR Management

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
Human Resources Manager	✓	✓
Absence Management		
Attendance Plans	✓	✓
Absence Requests	✓	✓
Approval Workflow	✓	✓
Attendance Confirmation	✓	Planned
Cause of Absence	✓	✓
Cause of Inactivity	✓	✓
Leave Types	✓	✓
Leave Accrual Forecasting	✓	✓
Absence Units	✓	✓
SmartFindExpress	✓	✓
Time Off in Lieu/Banked Time/Comp Time	X	✓
Applicant Tracking		
Applicant Tracking, Job Requisitions, Applicants	✓	✓
Integration with Microsoft Dynamics 365 Sparkrock ATS	✓	Planned
Integration with Microsoft Dynamics 365 Talent Recruit	X	Planned
Appraisal Management		
Appraisal Plans	✓	✓
Benefit Management		
Employee Benefits	✓	✓
Benefit Groups	X	✓
Benefit Plans	✓	✓

Collective Agreement Management	Sparkrock 2016	Sparkrock 365
Collective Agreements	✓	✓
Grievances	✓	✓
Harassment Complaints	✓	✓
Unions	✓	✓
Internal Resolution Methods	✓	✓
External Resolution Methods	✓	✓
Employee and Manager Self-Service	Sparkrock 2016	Sparkrock 365
Attendance & Requests (mySparkrock)	✓	✓
Attendance Approval (mySparkrock)	✓	✓
Absence Confirmation Manager (mySparkrock)	✓	Planned
Absence Confirmation Employee (mySparkrock)	✓	Planned
Administration (mySparkrock)	✓	X
Appraisals (mySparkrock)	✓	✓
HR Requests (mySparkrock)	✓	X
HR Request Approvals (mySparkrock)	✓	X
Pay Statements (mySparkrock)	✓	✓
Tax Forms (mySparkrock)	✓	✓
My Team (mySparkrock)	✓	✓
Profile (mySparkrock)	✓	✓
Tasks (mySparkrock)	✓	✓
Timesheet (mySparkrock)	✓	✓
Timesheet Admin (mySparkrock)	✓	✓
Timesheet Admin Monthly (mySparkrock)	✓	✓
Training & Registration (mySparkrock)	✓	✓
Manager Self-Service (mySparkrock)	✓	Partial
Reminders (mySparkrock)	✓	✓

Employee Management	Sparkrock 2016	Sparkrock 365
Qualifications	✓	✓
Confidential Information	✓	✓
HR Tasks	✓	✓
HR Budget General	✓	✓
Employee Classes	✓	✓
Employee Contracts	✓	X
HR Management Integrations	Sparkrock 2016	Sparkrock 365
HRIS Exports	✓	✓
OTIP/ONE-T Payroll Imports	✓	✓
OnSIS	X	✓
Parklane	✓	✓
OMERS	✓	✓
Ontario College of Teachers (OCT)	✓	✓
Teachers Pension Plan (TPP)	✓	✓
MVAL	X	✓
SmartFindExpress	✓	✓
OECTA	✓	Planned
AESOP	✓	Planned
Teachers Retirement Allowances Fund (TRAF)	✓	Planned
Prof. Association Details	✓	Planned
K12 Reporting Package	Sparkrock 2016	Sparkrock 365
K12 Reporting Package (Workforce)	✓	Planned

Position Management	Sparkrock 2016	Sparkrock 365
HR Reason Codes	✓	✓
HR Requests	✓	✓
HR Requests Approval	X	✓
Employee Experience Ledger	X	✓
HR Position Classes (HR Jobs)	✓	✓
HR Position FactBox	✓	✓
HR Position Rank	✓	✓
HR Job Criteria	✓	X
HR Categories	✓	✓
HR Departments	✓	✓
HR Agents	✓	✓
HR Reasons	✓	✓
HR Calendars	✓	✓
HR Task Types	✓	✓
HR Companies (Employer)	✓	✓
Assignment Reason Codes	✓	✓
Assignment Types	✓	✓
Seniority Groups	✓	✓
Seniority Types	X	✓
Member Plans	✓	✓
Location Classes	✓	✓
Salary Deferrals	X	✓
Retro Pay	✓	✓
Salary Calculator	X	✓

Training Management	Sparkrock 2016	Sparkrock 365
Trainings	✓	✓
Training and Registration (mySparkrock)	✓	✓
Upgrade Toolkit (Sparkrock 2016 to Sparkrock 365)	Sparkrock 2016	Sparkrock 365
Upgrade Toolkit	N/A	✓ NEW

Payroll Administration

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
HR Payroll Admin	X	✓
Payroll Administrator	✓	X
Payroll Administration	Sparkrock 2016	Sparkrock 365
Posted Payroll Processing	✓	✓
New Payroll Procedure Operations	X	✓
Payroll Ledger Entries	✓	✓
Payroll Processing	✓	✓
Batch Payroll Processing	✓	✓
Compensation Journal	X	✓
Payroll Entry HR Requests (mySparkrock)	✓	X
Retroactive Pay	✓	✓
Salary Deferral System	X	✓
PGP Encryption	X	✓
mySparkrock Platform Management	Sparkrock 2016	Sparkrock 365
APIs	✓	✓

Scheduling and Time Entry

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
Scheduling & Training Administrator	✓	X
Schedule Administrator	X	✓
Employee Scheduling		
	Sparkrock 2016	Sparkrock 365
Approval Workflow	✓	✓
Casual Employees	X	✓
Confidential Information	X	✓
Employee Scheduling Setup	✓	✓
HR Integration to Schedule Unit Employees	✓	✓
HR Pay Codes	✓	✓
Schedule Templates	✓	✓
Schedules	✓	✓
Max Warning Exclude Pay Group	✓	✓
Multi-Activity Shifts	✓	✓
Offers (mySparkrock)	✓	✓
Override Hourly Rate	X	✓
Bids (mySparkrock)	✓	✓
Requests for Absence (mySparkrock)	✓	✓
Confirmation and Approval Reminders	✓	✓
Unit Schedule (mySparkrock)	✓	✓
My Schedule (mySparkrock)	✓	✓
Shift Trading (mySparkrock)	✓	✓
Confirm Shifts Worked (mySparkrock)	✓	✓
Priority by Seniority Hours	✓	✓
Approve Shifts Worked (mySparkrock)	✓	✓
Integration to Absence Management	✓	✓ NEW
Integration to Training Management	✓	Planned
Integration to Payroll	✓	✓

mySparkrock Platform Management	Sparkrock 2016	Sparkrock 365
APIs	✓	✓
Time Clock	Sparkrock 2016	Sparkrock 365
Biometric integration to 3 rd party providers	✓	Planned
Time Clock (mySparkrock)	✓	Planned
Web Clock In/Out (mySparkrock)	✓	Planned
Time Entry	Sparkrock 2016	Sparkrock 365
Timesheet Setup (excluding approval)	✓	✓
Timesheet Approvals Setup	✓	✓
Timesheet Integration to Payroll	✓	✓
Timesheet Entry (Employee & Admin)	✓	✓
Timesheet Approvals	✓	✓
Timesheet (mySparkrock)	✓	✓
Timesheet Admin (mySparkrock)	✓	✓
Timesheet Approvals (mySparkrock)	✓	✓
Time Entry (Version 1)	✓	Discontinued