

# Sparkrock 365

## Winter 2020

---

Update 1

April 2020

---

Sparkrock Inc.

SPARKROCK 

Sparkrock 365's Winter 2020 *Update 1* combines several fixes with exciting new functionality. In this guide, you will discover the most important things about this release.

## Top things to know

This update to the Sparkrock 365 Winter 2020 release adds new HR Management, Scheduling and Time Entry capabilities to the solution.

### Highlights

#### Platform

- Microsoft Dynamics 365 Business Central updated from 15.3 to 15.4

#### Finance & Procurement

- Account Sets: [Block Reason](#) now available for page personalization

#### HR Management

- [Employees as Vendors](#)
- Absence [EOY Carry Forward](#) Worksheet
- New HR Reason Code “[Leave Change](#)” for changing leave details
- [Salary deferral](#) enhancements
- Updates to built-in [pension plan](#) integrations (OMERS, OTPP, TPP)
- [Absence resequencing](#)
- [Absence top-up by credits](#)
- [Copy confidential information](#) when creating HR tasks
- Employees can cancel and re-open [absence requests](#) in mySparkrock
- [Record daily hours for Statutory Holiday Pay earnings](#)
- A new payroll [event code](#) was added
- [mySparkrock Profile](#) employee updates

### Scheduling & Time Entry

- Time Entry units can be configured to permit [Manager Time Entry](#) for their direct reports
- [Email reminders for Time Entry](#)
- [Dimension values display](#) on Time Entry Admin pages in mySparkrock

### A note on terminology

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 platform<sup>1</sup> which powers Sparkrock 365 has been updated from 15.3 to 15.4.

## Finance & Procurement

### Block Reason

The field *Block Reason* is now available for personalization on the **Account Sets** page.

## HR Management

### Event Codes

A new payroll event code was added which returns the value of the *CPT30* field on the **Employee** card. Event Code 007 can be used in a process procedure using the Event procedure operation. *Note: This code is only available with the USPY Connector app.*

### Copy confidential information

The Mass Create HR Employee Tasks function was enhanced to copy confidential information from the previously completed employee task, based on the **HR Task Type** field *Copy Conf. Details to New Task*. This feature can be used for the Annual Offense Declaration.

---

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

## Employees as Vendors

Employee **Vendor** record creation was implemented in this release. Employees can be created with an associated vendor record to remit expenses or for other purposes.

To enable the creation of an employee Vendor record during processing of a NEW HIRE HR Request, enable the *Create Employee Vendor* check box on the **Employee Class(es)** for which a Vendor record should be created. Note: The Vendor record will be removed if a NEW HIRE HR Request is later reversed.

Sparkrock 365 (QA) | < Employee ▾ Position ▾ Compensation ▾ Benefit Administration ▾ App > | ≡

Employee Classes: All ▾ | Search + New Manage ▾ Open in Excel

Code ↑	Description	Create mySparkrock User	Create Employee Vendor	Read Only mySparkrock Attend. Request
HOURLY	Hourly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REGULAR EMPLOYEE	Regular Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

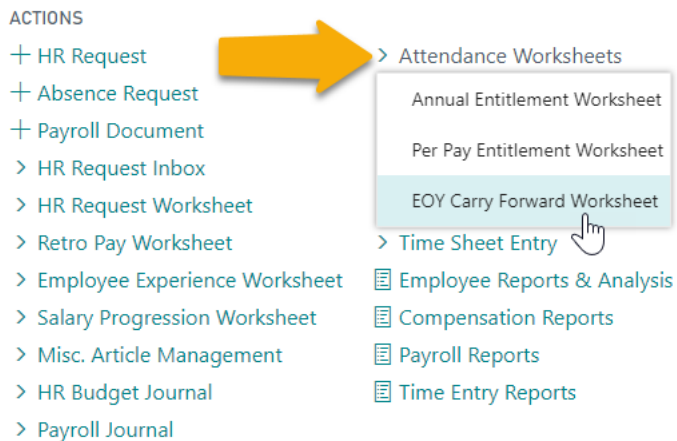
A new field *Employee Vendor Template Code* was added to the *General* FastTab of **Advanced HR Setup**. If a Configuration Template is selected, it will be used when creating an employee Vendor record during processing of a NEW HIRE HR Request. If this field is left blank, then a template will not be applied.

Employee payment information will be synchronized to the employee Vendor bank account card if the field *Sync Vendor Bank Account Code* is enabled in the payroll integration setup.

If configured, the mySparkrock User record for the employee will also be updated with the employee Vendor number. This will appear in the *Expense Vendor No.* field of the *Expense Claims* FastTab of the **mySparkrock User Setup** card. This field can be used for payment requests or in other situations where a payment must be made to employees outside of the regular payroll process.

## EOY Carry Forward

The Absence EOY Carry Forward function has been renamed **EOY Carry Forward Worksheet** and can be found under *Attendance Worksheets* on the **Human Resources Manager Role Center**.



The worksheet allows you to see all suggested changes prior to posting them. The *Load Lines* action allows for carrying forward balances or removing existing balances from select Causes of Absence. Carry Forward balances now respect the *Maximum Balance* amount specified on the receiving Cause of Absence. For full details consult [Configuring End of Year Carry Forward](#) on the Sparkrock [Customer Success Center](#).

## Leave Change

A new HR Reason Code LEAVE CHANGE was added. This is a details change type which focuses primarily on leave fields. On the supporting Details page, the *HR Emp. Assignment Entry No.* lookup is filtered to only display leave assignments. Leave specific fields such as *Leave FTE*, *Cause of Inactivity Code*, *Leave Type* and others can be changed as required. Note that an HR Request with HR Reason Code DETAILS CHANGE can no longer be used to change a leave assignment.

### Salary Deferrals

When an employee's location changes this may necessitate a new employee assignment. As salary deferrals are amounts associated with specific positions/assignments, moving to a new assignment may require that the previous deferral amounts be moved in concert. This is only necessary if the employee moves to an assignment with a different HR Position Class. The action *Reclass Deferred Amounts* is available on the **Compensation Ledger Entries** page, which can be accessed from the **HR Employee** pages. It can be used on lines with a non-zero *Deferred Amount*. For full details on using this action consult the Sparkrock [Customer Success Center](#).

The payroll administrator can review the total deferral amount on individual assignments by employee. The Compensation Journal Test Report has a new slider to include a Salary Deferral Summary.

COMPENSATION JOURNAL - TEST

---

**Saved Settings**

---

Changes to the options and filters below will be saved only to: 'Last  
Use default values from: ..... Last used options and filter:


---

**Options**

---

Show Pay Code Summary .....

Show Allocation Summary .....

Show Salary Deferral Summary .....  

Show Warnings .....

Show Errors .....

Show Allocations .....

A new field "Deferred To-Date" can be added to the Compensation Journal lines via personalization to show this amount if desired.

### Record daily hours for Statutory Holiday Pay earnings

Statutory Pay functionality was enhanced to record hours with earnings, for employee assignments with a *Pay Type of Hourly*. The Hours/Days in the **Compensation Journal** line are computed by dividing the calculated stat pay earnings by the Hourly Rate. This permits the statutory pay to be reported as Insurable Hours.

### Pension Plans

- To respect an OTPP plan provision, plan deductions are stopped when the employee has 6 or more consecutive days off.
- A restriction in OTPP processing that required a non-blank **HR Position Classification Code** (visible with *Show More* in the *General FastTab*) has been removed. The Employee Benefit fields (*Receives Pension* and *Not Eligible/Not Participating*) determine which employees are selected.
- For OMERS a new *Employment Status* field on **Employee Benefits** determines if the employee should be reported as Continuous Full Time (when blank or Full Time) or Other Than Continuous Full Time (when Part Time).

EMPLOYEE BENEFITS

Search + New Edit List Delete Open in Excel

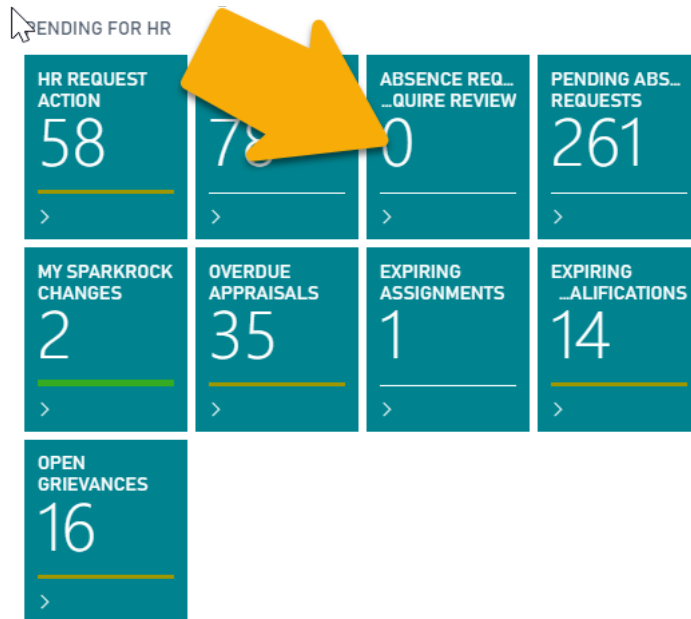
Employee No. ↑ ▾	Benefit Annual Salary	ID	Total Benefit Eligible FTE	Total Benefit Eligible Salary	Employment Status	B S
→ E0125	:	0.00 E0125	0.00	0.00	<input type="text"/>	

Full Time  
Part Time



**Absence Resequencing**

Absence resequencing periodically reviews and recalculates how future absences consume sequencing to account for any changes introduced (for example, a new absence that occurs sooner than one which was previously approved). This can affect which Cause of Absence balances are consumed by each request. A batch report was added to review future absences to account for current absence activity and update all future transactions. This may result in some requests which are over balance. Such changes must be reviewed and approved, adjusted, or denied by the Human Resources Manager. To do so, use the ABSENCE REQUESTS REQUIRE REVIEW cue in the PENDING FOR HR panel on the **Human Resources Manager Role Center**.



For full details on using resequencing consult the Sparkrock [Customer Success Center](#).

**Absence top-up by credits**

A new absence top-up mode was added to absence management. In addition to the previously supported mode which was Hours/Percentage based, an Occurrence/Credit mode was added. This is configured on the Advanced HR Setup card on the Attendance FastTab using the Absence Top Up Mode selector. When Occurrence/Credit Based is selected, a Unit of Measure can also be set, this setting affects EOY Carry Forward. For full details on top-up credits consult the Sparkrock [Customer Success Center](#).

### Modifying Absence Requests

Employees can cancel an approved future-dated absence request and re-open a cancelled absence request in mySparkrock **Attendance & Requests**.

mySparkrock MY SELF SERVICE

[Sparkrock 365 \(QA\)](#) > [Attendance & Requests](#) > Attendance & Requests #A0000438

### Attendance & Requests #A0000438

✓ OPEN > ✓ AWAITING APPROVAL > ✓ APPROVED

mySparkrock MY SELF SERVICE

[Sparkrock 365 \(QA\)](#) > [Attendance & Requests](#) > Attendance & Requests #A0000438

### Attendance & Requests #A0000438

1 OPEN > 2 AWAITING APPROVAL > ✓ CANCELLED

**mySparkrock Profile updates**

The Edit button is available to employees on the mySparkrock **Profile** page to allow update of *General* section information including address, telephone numbers, and emergency contacts. Once submitted by the employee, the changes must be reviewed and approved (or denied) by the Human Resources Manager. To do so, search **Tell Me** for **mySparkrock Changes** OR use the MY SPARKROCK CHANGES cue in the PENDING FOR HR panel on the **Human Resources Manager Role Center**.



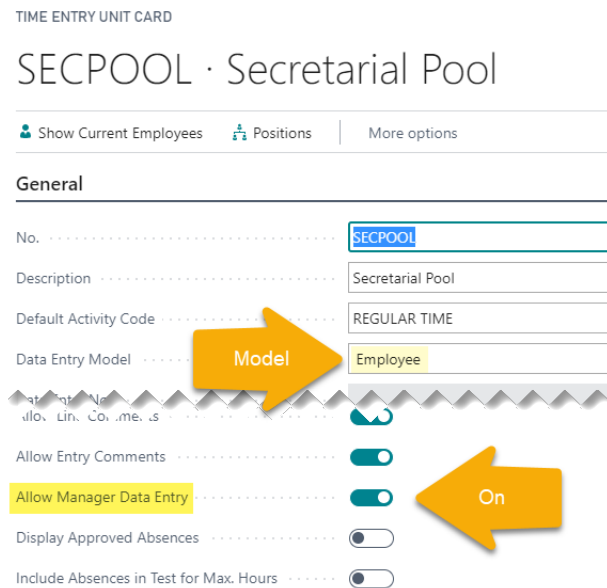
The **MY SPARKROCK CHANGES** list page opens. By default, Pending changes are displayed. Open the **MYSARKROCK CHANGE CARD** for each line to review and approve or deny the changes. The next pending change will open automatically when you approve or deny a pending change. If desired, use the *Options* drop down on the list page to review Approved or Denied changes.

*Note that only one Pending change can be pending at one time for a given employee. This prevents multiple changes from being processed out of sequence.*

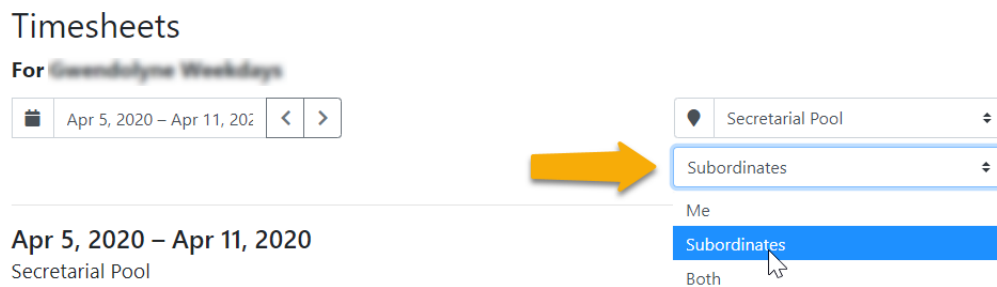
## Scheduling & Time Entry

### Manager Time Entry

Time Entry units in which employees enter their own time can be configured to permit Managers to also perform Time Entry for their direct reports (as determined by the HR Position reporting relationship). This setting is off by default. To enable this setting, access the **Time Entry Unit Card** from the **Time Entry Unit List**, and enable the *Allow Manager Data Entry* slider. Note that the *Data Entry Model* must be *Employee* for this setting to take effect.



On mySparkrock, on the **Timesheets** page, a Manager can use the new dropdown below the Time Entry Unit selector to choose whether to enter their own time, time for subordinates, or both combined.



### Email reminders for Time Entry

Email reminders for Time Entry submission and approval have been implemented. A Time Entry reminder type has been added to the **Email Reminder Setup List** to configure the default behavior. Time Entry reminders can be enabled or disabled per company. Unit specific behaviors including whether notifications are sent, and when they are sent, can be refined by accessing the **Time Entry Unit Card** from the **Time Entry Unit List**. For full details consult the [Time Entry Setup and Configuration](#) Guide on the Sparkrock [Customer Success Center](#). Note that submission and approval reminders are controlled by the same settings and cannot be independently configured.

EMAIL REMINDER SETUP LIST ✓ SAVED

Search + New Edit List Delete Open in Excel

Reminder Type ↑	Description	Start Date Formula	End Date Formula	Reminder Frequency	Max No. of Attempts	Recipient Email Preference	Ena...
Finance Req...	Finance Request reminder	2D	0D	2D	0	Company	<input type="checkbox"/>
Absence Re...	Absence Request reminder	2D	0D	2D	0	Personal	<input type="checkbox"/>
Employee H...	Employee HR Task reminder	-2D	10D	1D	0	Personal	<input checked="" type="checkbox"/>
→ Time Entry	Time Entry reminder	0D	0D	2D	0	Company	<input checked="" type="checkbox"/>
							<input type="checkbox"/>

### Dimension value display

Dimension values display on the mySparkrock **Timesheet Admin** pages when configured for View/Edit on the Time Entry Unit setup. Dimensions are displayed with the page controls, below the Employee, Position, and Activity drop-down selectors.

#### Timesheet Admin

[Download Report](#)

Apr 12, 2020 – Apr 18, 2020 < >

Rosedale ⇅

✕

Head Caretaker ⇅

Regular Time ⇅

300; LARGE; 000;

Open 2

Pending Approval 0

Denied 0

Dimensions are displayed for individual Employee/Position/Activity combinations: when multiple employees, positions, or activities are displayed then no dimension values can be shown. For full details consult the Sparkrock [Customer Success Center](#).

# Defects Corrected

## Platform

The base Microsoft Dynamics 365 Business Central platform<sup>2</sup> which powers Sparkrock 365 has been updated from 15.3 to 15.4.

Unwanted actions appeared in the navigation bar of certain pages when the selected language is set to English (Canada)

## Finance & Procurement

### General Ledger and Dimensions

On the **Chart of Accounts**, Commitments added Credit Memo amounts instead of subtracting them.

### Requisitions Management

The attachment counter for Finance and Procurement documents was not working properly, and in some cases the wrong attachment was displayed.

On a Purchase Invoice, Dimensions were inadvertently deleted when selecting a G/L Account after previously selecting an Account Set.

---

<sup>2</sup> A [detailed list](#) of cumulative platform fixes in the 15.x updates is available from Microsoft.

## HR Management

### Absence & Leave Management

Absence sequencing fixes to cascade correctly through a sequence.

A change was made to permit sequencing when a sequence shares the same Cause of Absence with an Attendance Plan line.

When reviewing **Absence Request to Approve**, using the *Reject* action could fail with an “metadata object Table 0” error. This has been corrected.

## Employee Management

When an **HR Request** for a detail change which creates a new assignment has same effective date as a previously created assignment, the existing assignment will be cancelled. For example, if a future pay increase is scheduled, and the employee is subsequently placed on leave, the scheduled future increase may need adjustment to reflect the leave. The fix ensures that the original assignment is cancelled and the new one will take effect.

*Reference: CAS-23030*

An **HR Request** with Reason Code ASSIGN END ROE did not properly create an entry in the Employee Record of Employment table

An **HR Request** with Reason Code REHIRE no longer resets the Original Hire Date on the HR Employee record. (This field can be found under KEY DATES on the Administration FastTab.)

If the Scheduling module is in use, an **HR Request** Details Change now updates the Employee Position Entry No on any scheduled shifts after the effective date.

The Mass Create HR Employee Tasks function was enhanced to copy confidential information from the previously completed employee task, based on the **HR Task Type** field *Copy Conf. Details to New Task*. This feature can be used for the Annual Offense Declaration.

The OCT integration brought in the master list of qualifications but did not populate each individual employee's qualifications.

*Reference: CAS-21844*

The OMERS integration will correctly populate Employment Status by using the Posting Date from the current Compensation Ledger Entry.



## Payroll Administration

A new field *Check No.* was added to the **Compensation Ledger Entry**. On posting of the Compensation Journal, this field is updated with the check no. from the related payroll document.

HR Employee to Payroll employee synchronization was enhanced so that when the HR Employee CPT30 field is set to *true*, the synchronization sets the *CPP Exempt* field on the Payroll employee federal tax record.

Issues with processing Salary Deferrals together with Allowances were resolved so that allowances are also deferred

To ensure compensation data integrity, the field *Week Start* in the *General* section of the **Advanced HR Setup** page cannot be changed once **Compensation Journal** Line records have been created.

Validation was added to ensure that when salary deferrals are used for an employee assignment, the field *Days/Year* in the assignment record is not empty. (This field can be found on the *Timekeeping* FastTab of the **HR Employee Assignment Card**.) The system will log an error in the Compensation Journal for that line and leave the salary deferral amount blank.

The compensation journal Load Lines function has been fixed to ensure that if allowance lines are individually removed from the compensation journal, and the allowances are then changed to make a correction, allowances lines are properly reloaded in the compensation journal when Load Lines is run again.

## Scheduling & Time Entry

### Employee Scheduling

An **HR Request** for a Details Change now updates the Employee Position Entry No. on any scheduled shifts after the effective date.

Overnight shifts now correctly allocate the activities to the appropriate day when the setting *Next Day for Overnight Activities* is enabled for the Schedule Unit.

Integration with the compensation system has been improved to ensure that shift activities can be individually removed from the compensation journal, changed to make a correction in scheduling, and then fully reloaded in the compensation journal.

### Time Entry

On the **Time Sheet Entry** page (core product) the Status Filter action was not filtering the list as intended.

When reviewing Time Entry Requests to Approve, using the Reject action could fail with an “metadata object Table 0” error. This has been corrected.

## Known Issues in this Release

These minor issues will be addressed in an upcoming release.

- When reviewing employee profile change requests, fields are editable when they should be read-only, including after a change is approved or denied. The *Emergency Contact Relative Codes* are presented as text fields, instead of restricting data entry to the list of preconfigured relative codes.
- The list page which supports the ABSENCE REQUESTS REQUIRE REVIEW cue cannot be found through the **Tell Me** search feature.
- Paying a credit-based absence top up is not working for hourly assignments.