HRM4Baltics what's new – August 2024
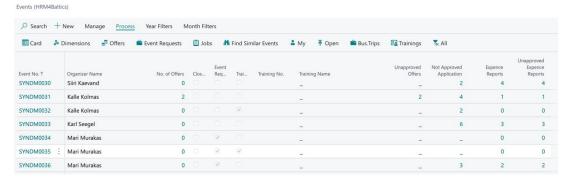
ERP HRM CRM BI

Events
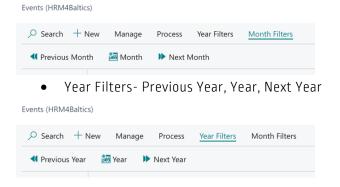
Event list updates

New fields added to the event list: Unapproved offers, Not Approved Applications, Expense Reports, Unapproved Expense Reports.

New buttons on the ribbon:
- Month filters- Previous Month, Month, Next Month

- Year Filters- Previous Year, Year, Next Year

Notification to the employee who went on a business trip to submit a report.

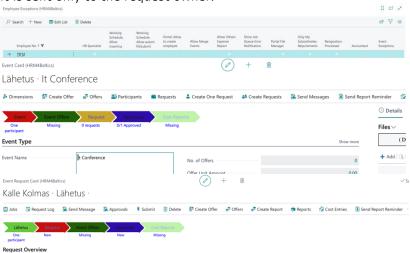A new fast tab „Report Reminder" has been added to the Event setup.

It is possible to assign an email template for the reminder to the fast tab and define a time formula for the automatic sending of reminders. Additionally, you can configure how many days after the event has ended the reminders will be reviewed and sent.

Event Category – Event types : A new marker field „Send Reminder" has been created. When the marker is activated for the code, reminders will be sent for these events.

A new button „Send Report Reminder" has been created for the Events and the Event request. The button is only visible to employees who have the „Event Exceptions" marker activated on the Employee Exceptions page. For an event, the reminder is sent to all participants, while for a request, it is sent only to the request owner.

A job queue for automatic sending of notifications has been created with Codeunit 24002002 and parameter sequence EVENT_REPORT_REMIND, which requires configurations on the Event Setup page.

Requests

On a working factor change request, new salaries will be created based on the previous ones.

An enhancement has been made to the solution for creating new salaries based on the previous ones in the working factor change request.

Usage requires the marker „Update Existing Salaries" to be selected on the Multiline Request entry type card.

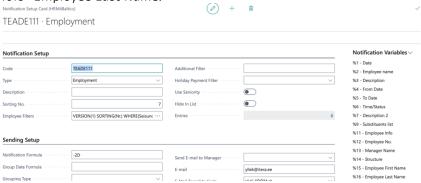Additionally, the marker „Salary dividend by Working factor" must be activated on the Salarie Types page.

There must be a valid existing link between the employment contract and the salaries.

Employees

New variables added to the Notification Setup card.

Two new variables have been added to the notification setup card: %15-Employee First Name and %16- Employee Last Name.

Approvals

Additional email addresses for approvers in the approval circle for Need to Approve e-mail

Template.

In the approval circle, it is now possible to add an email template for each approver. A new field „Need Approve E-mail Template" has been added to the Approvers page, where this can be configured.

Permissions

Permissions to view files

A new type „File" has been added to the Permission Lines table, which allows for restricting file viewing permissions in the Files List/Employee Files.

Expense Reports

Exceptions for expense report reimbursement

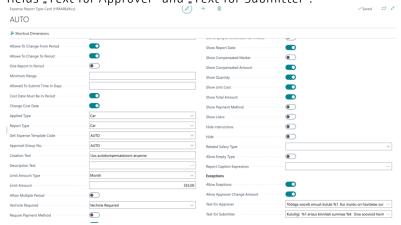It is possible to submit a request for an amount exceeding the limit as an expense report. To use this solution, you need to activate the markers „Allow Exceptions" and „Allow Approver to Change Amount" on the Expense Report Type Card page. Additionally, you can configure email texts in the fields „Text for Approver" and „Text for Submitter".

In the approver setup, it is possible to define an „Exception approver" by activating the marker.

New fields have been created for the expense report:
- In header: Require Exception marker, Required Exception Reason, Required Exception Amount, Required Exception Difference.

- Rows: An exception that opens the expense report line exception page, where the reason and amount for the exception can be entered. When these fields are filled in, the corresponding fields in the header are automatically populated.

Controls set for exceptions:

- The exception can be modified by the submitter when the status is "new" and by the exception approver when the status is "pending approval," provided that modifications are allowed in the settings.
- When the exception approver approves, the amounts are updated to the reimbursable amount.
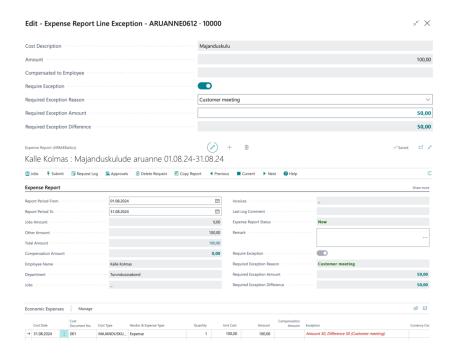- Exception amount entry and page exit check: " Required Amount is the same as compensated amount. Do You want to cancel requiring exception."
- The exception amount cannot be less than the reimbursable amount.

Interfaces

New SOAP webservice for Payroll Entries

A new SOAP page for reading payroll entries has been created in web services :24017190 "PER SOAP Payroll Entries".
Fields included in the query.

```
{
        "@odata.etag": "W/\"JzE5Ozc2NTkwODg3NzMzMDA5ODU2ODAxOzAwOyc=\"",
        "EntryNo": 37,
        "AccountNo": "3240",
        "EmployeeNo": "T001",
        "PostingDate": "2019-10-04",
        "AccountingPeriod": "2019-09",
        "PaymentPeriod": "2019-10",
        "CalculationPeriod": "2019-09",
        "DocumentNo": "PAYROLL 04.10.19",
        "Amount": 1025.44,
        "Description": "Payment",
        "Type": "Normal",
```

    "Remark": "",
    "WorkingScheduleGroupNo": "",
    "CurrencyCode": "",
    "CurrencyFactor": 0,
    "CurrencyAmount": 0,
    "EmployeeName": "Mari Murakas",
    "MainContractNo": "",
    "VehicleRegistrationPlate": "",
    "BankNo": "SEB",
    "Dimension1": "FIN",
    "Dimension2": "RMP",
    "Dimension3": "",
    "Dimension4": "",
    "Dimension5": "",
    "Dimension6": "",
    "Dimension7": "",
    "Dimension8": "",
    "SystemCreatedAt": "0001-01-01T00:00:00Z",
    "SystemId": "596e1fcc-5ee0-e911-80f5-00155d420cda",
    "SystemModifiedAt": "0001-01-01T00:00:00Z",
    "Timestamp": 21277182,
    "EntryGUID": "43e0fe9e-b7f8-4997-b6cb-b59e698ef3ca"
},

Data is read from the table: PLK Payroll Ledger Entry [24002035].

Field Name	Type	Note	Data from the table PLK Payroll Ledger Entry [24002035].
EntryNo	Integer		Entry No.
AccountNo	Code		Account No.
EmployeeNo	Code		Employee No.
PostingDate	Date		Posting Date
AccountingPeriod	Code		Accounting Period
PaymentPeriod	Code		Payment Period
CalculationPeriod	Code		Calculation Period
DocumentNo	Code		Document No
Amount	Decimal		Amount
Description	Text		Description
Type	Option	normal/additional	Type
Remark	Text		Remark
WorkingScheduleGroupNo	Code		Working Schedule Group No.
CurrencyCode	Code		Currency Code
CurrencyFactor	Decimal		Currency Factor
CurrencyAmount	Decimal		Currency Amount
EmployeeName	Text		Employee Name
MainContractNo	Code		Main Contract No.
VehicleRegistrationPlate	Code		Vehicle Registration Plate
BankNo	Code		Bank No.

Dimension1	Code	Payroll dimension	Payroll Dimension 1 Code
Dimension2	Code	Payroll dimension	Payroll Dimension 2 Code
Dimension3	Code	Payroll dimension	Payroll Dimension 3 Code
Dimension4	Code	Payroll dimension	Payroll Dimension 4 Code
Dimension5	Code	Payroll dimension	Payroll Dimension 5 Code
Dimension6	Code	Payroll dimension	Payroll Dimension 6 Code
Dimension7	Code	Payroll dimension	Payroll Dimension 7 Code
Dimension8	Code	Payroll dimension	Payroll Dimension 8 Code
SystemCreatedAt	Date Time		System Created At
SystemId	GUID		SystemId
SystemModifiedAt	Date Time		SystemModifiedAt
Timestamp	BigInteger		SQL Timestamp
EntryGUID	GUID		Entry GUID