

HRM4Baltics what's new – August 2024

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Events

Event list updates

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

Events (HRM4Baltics)

Event No. ↑	Organizer Name	No. of Offers	Clos...	Event Req...	Trail...	Training No.	Training Name	Unapproved Offers	Not Approved Application	Expense Reports	Unapproved Expense Reports
SYNDM0030	Siiri Kaevand	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	2	4	4
SYNDM0031	Kalle Kolmas	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-	2	4	1	1
SYNDM0032	Kalle Kolmas	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	2	0	0
SYNDM0033	Karl Seegel	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-	-	6	3	3
SYNDM0034	Mari Murakas	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	-	-	0	0
SYNDM0035	Mari Murakas	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	-	0	0
SYNDM0036	Mari Murakas	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	-	3	2	2

New buttons on the ribbon:

- Month filters- Previous Month, Month, Next Month

Events (HRM4Baltics)

- Year Filters- Previous Year, Year, Next Year

Events (HRM4Baltics)

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.

Events Setup (HRM4Baltics)

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.

Event Types (HRM4Baltics)

Code ↑	Def Vendor No.	Offer Web Request Template Code	Training Area Code	Training Type Code	Training Subtype Code	Do... Tra...	Allowed Increase Amount	Allowed Increase Percentage	Creation Text	No. of Allowed Expense Reports	Send Reminder
→ KONVERENT	H00013			KONVERENTS		<input type="checkbox"/>	100,00	10,00			<input checked="" type="checkbox"/>
KOOSOLEK	H00013					<input type="checkbox"/>	0,00	0,00			<input checked="" type="checkbox"/>
MUU	H00013					<input type="checkbox"/>	0,00	0,00			<input type="checkbox"/>

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.

Employee Exceptions (HRM4Baltics)

Employee No. 1: T012

Event Card (HRM4Baltics)

Lähetus · It Conference

Event Type: Conference

No. of Offers: 0

Offer Unit Amount: 0,00

Request Overview

Jobs, Request Log, Send Message, Approvals, Submit, Delete, Create Offer, Offers, Create Report, Reports, Cost Entries, Send Report Reminder

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.

Multiline Entry Types (HRM4Baltics)

Code ↑	From Date Formula	To Date Formula	Min To Date Formula	Loc... Def...	Limit Value	Value Req...	Over and Equal Connected No.	Under Connected No.	Default Action	Add Sal... By Stru...	Update Existing Salaries
→				<input type="checkbox"/>		<input type="checkbox"/>			Add	<input type="checkbox"/>	<input type="checkbox"/>

Permission Lines

Event Request	Working Schedule	Expense Report	Team	My All Teams	My Department	Assistant	All	View Filters	View Extra Filters
File	ne	None	View	None	None	None	None	VERSION(1) SORTING(Field1)	
Multiline	ne	None	None	None	None	None	View		
Report	ne	None	None	None	None	None	None		

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“.

Expense Report Type Card (HRM4Baltics)

AUTO

Shortcut Dimensions

Allow to Change From Period	<input checked="" type="checkbox"/>	Show Report Date	<input checked="" type="checkbox"/>
Allow to Change To Period	<input checked="" type="checkbox"/>	Show Compensated Marker	<input checked="" type="checkbox"/>
One Report In Period	<input type="checkbox"/>	Show Compensated Amount	<input checked="" type="checkbox"/>
Minimum Range		Show Quantity	<input checked="" type="checkbox"/>
Allowed to Submit Time In Days		Show Unit Cost	<input checked="" type="checkbox"/>
Cost Date Must Be In Period	<input checked="" type="checkbox"/>	Show Total Amount	<input checked="" type="checkbox"/>
Change Cost Date	<input checked="" type="checkbox"/>	Show Payment Method	<input type="checkbox"/>
Applied Type	Car	Show Libers	<input type="checkbox"/>
Report Type	Car	Hide Instructions	<input type="checkbox"/>
Def. Expense Template Code	AUTO	Hide	<input type="checkbox"/>
Approval Group No.	AUTO	Related Salary Type	
Creation Text	Uus autokompensatsiooni anname	Allow Empty Type	<input type="checkbox"/>
Description Text		Report Caption Expression	
Limit Amount Type	Month	Exceptions	
Limit Amount	335,00	Allow Exceptions	<input checked="" type="checkbox"/>
Allow Multiple Period	<input type="checkbox"/>	Allow Approver Change Amount	<input checked="" type="checkbox"/>
Vehicle Required	Vehicle Required	Text for Approver	Töötaja soovib erisuut kulule %1. Kui muudu on hõivatav sur...
Require Payment Method	<input type="checkbox"/>	Text for Submitter	Kululiigi %1 erisuut kinnitati summas %4. Sina soovisid hõvit...

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

Approvers (HRM4Baltics)

Sorting No.	To Date	Allow Error	Allow Cha.	Not. Rept.	Not. Can.	Not. Stop	Notify Need Approve	Notify Approved	Not. App. Can.	Not. Need Co.	Not. Co.	Send Notification to Employee	Automatic Approve	Req. Sign	Sub. Can not be	Not. All. On Me.	Exception Approver
1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

New fields have been created for the expense report:

- In header: Require Exception marker, Required Exception Reason, Required Exception Amount, Required Exception Difference.

Expense Report (HRM4Baltics)

Kalle Kolmas : Majanduskulude aruanne 01.08.24-31.08.24

Jobs Submit Request Log Approvals Delete Request Copy Report Previous Current Next Help

Expense Report

Report Period From	01.08.2024	Invoices	
Report Period To	31.08.2024	Last Log Comment	
Jobs Amount	0,00	Expense Report Status	New
Other Amount	100,00	Remark	
Total Amount	100,00	Require Exception	<input checked="" type="checkbox"/>
Compensation Amount	0,00	Required Exception Reason	Customer meeting
Employee Name	Kalle Kolmas	Required Exception Amount	50,00
Department	Turundusosakond	Required Exception Difference	50,00
Jobs			

- 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.

Economic Expenses | Manage

Cost Date	Cost Document No.	Cost Type	Vendor & Expense Type	Quantity	Unit Cost	Amount	Compensation Amount	Exception
31.08.2024	001	MAJANDUSKU...	Expense	1	100,00	100,00		Amount 50, Difference 50 (Customer meeting)

Edit - Expense Report Line Exception - ARUANNE0612 - 10000

Cost Description Majanduskulu

Amount 100,00

Compensated to Employee

Require Exception

Required Exception Reason Customer meeting

Required Exception Amount 50,00

Required Exception Difference 50,00

Expense Report (HRM4Baltic) ✓ Saved

Kalle Kolmas : Majanduskulude aruanne 01.08.24-31.08.24

Jobs Submit Request Log Approvals Delete Request Copy Report Previous Current Next Help

Expense Report Show more

Report Period From 01.08.2024

Report Period To 31.08.2024

Jobs Amount 0,00

Other Amount 100,00

Total Amount 100,00

Compensation Amount 0,00

Employee Name Kalle Kolmas

Department Turundusosakond

Jobs

Invoices

Last Log Comment

Expense Report Status **New**

Remark

Require Exception

Required Exception Reason **Customer meeting**

Required Exception Amount 50,00

Required Exception Difference 50,00

Economic Expenses Manage

Cost Date	Cost Document No.	Cost Type	Vendor & Expense Type	Quantity	Unit Cost	Amount	Compensation Amount	Exception	Currency Cst
→ 31.08.2024	001	MAJANDUSKU...	Expense	1	100,00	100,00		Amount 50 Difference 50 (Customer meeting)	

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/\\"JzE5Ozc2NTkwODg3NzNmZMDA5ODU2ODAxOzAwOyc=\\"",
  "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