HRM4Baltics what's new – October 2024

Events

The approval process for the Offers and the offer can be reopened if Coordination Request is rejected.

A field "Offer Approval Group No." has been added to the Event categories. The value will be included in the new offers.

Event Caregories (HRM4Baltics)   ✓ Saved

🔍 Search ＋ New 📝 Edit List 🗑 Delete 📋 Types ♪ Dimensions 📋 Fields Setup

Code ↑		Allow Jobs	Automatic Event	Approval Group No.	Absence Code	Captions Syntax (Estonian)	Captions Syntax (English)	ALlow Em... Type	Allow Curr...	Show Sub... (Eve...	Show Exp... Tem... (Eve...	Offer Approval Group No.
→ KOOLITUS	⋮	☑	☑	LÄHETUS	KOOLITUS	Koolituse %1	Training %1	☐	☐	☐	☐	H-KINNITMA...
KOOLITUS-LÄHETUS		☑	☑	LÄHETUS	LÄHETUS	Koolitus-lähetuse %1	Business Trip - Training %1	☐	☑	☑	☑	
LÄHETUS		☑	☑	LÄHETUS	LÄHETUS	Lähetuse %1	Business Trip %1	☐	☑	☑	☑	H-KINNITMA...

If an approval group is set up for the offer, the "Approve" button will disappear from the card.

Instead buttons "Send to Approval Request", "Approvals" and a new field "Approval Status" will appear.

Offer Card   ✏   ＋   🗑

Business Trip Offer:

🔍 Open Card ⬆ Re-Open 📋 Jobs ✉ Send Approval Request 📊 Approvals 📋 Request Log

Request   Show less

Offer No.	PÄRING0241	Offer Status	Approved
Offer Date	31.10.2024	Coorination Status	**Approved**
Vendor No.	H00013	Approval Status	New
Vendor Name	Estravel AS	Event Category	Lähetus
Organizer No.	T012	Event Description	15.08.24-20.08.24
Organizer Name	Mari Murakas		
Expense Template Code	LÄHETUS		

The approval includes buttons for "Approve," "Reject," and "Cancel Approval" (if the offer status is still waiting approval).

The requirement for a comment upon rejection can be managed on the "Approval Groups" page in the field "Require Comments".

Approval Groups (HRM4Baltics)

🔍 Search ＋ New 📝 Edit List 🗑 Delete ✏ Edit 👁 View ✔ Approval Approvers

Approval Setup No. ↑		Description	Allow to Del...	Allow To Insert	Allow To Repl...	Aut... Repl...	Allow App...	Disa... Dub...	Allow App... Once	Aut... Co...	Last App... Aut... Co...	Require Comments
→ AUTO	⋮	Autokulud	☑	☑	☑	☑	☑	☑	☐	☐	☐	☑

When the approval cycle is confirmed, the "Accepted" process is automatically triggered.

Reopening for editing will cancel the current approval.

Offer Card   ✏   ＋   🗑

Business Trip Offer: Kinnitusringi testimine

🔍 Open Card ⬆ Re-Open 📋 Jobs ✉ Send Approval Request 📊 Approvals 📋 Request Log

Request   Show less

Offer No.	PÄRING0236	Offer Status	Approved
Offer Date	21.10.2024	Coorination Status	**Approved**
Vendor No.	H00013	Approval Status	*Rejected*

The Offer card can be modified if the Offer Status, Coordination Status, and Approval Status are all marked as "New."

A new Approval Status block has been added to the Fact Box.

Offer Card

Business Trip Offer: Kinnitusringi testimine

✓ Saved

Q Open Card 🛫 Re-Open 🗂 Jobs 📧 Send Approval Request 📊 Approvals 📄 Request Log

Request

Show less

Offer No.	PÄRING0236
Offer Date	21.10.2024
Vendor No.	H00013

Offer Status	Approved
Coorination Status	**Approved**
Approval Status	*Rejected*

ⓘ Details   📎 Attachments (0)

Approval Status

Rejected

Invoices

The approval cycle log can be viewed under the " Request log " button.

Request Log (HRM4Baltics)

🔍 Search

Request Type		Request No. ↑ ▼	Request Date	Employee No.	Approved Amount	Created Time
Offer Approvals	⋮	TAOT01555	31.10.2024	A001		31.10.2024 11:36
Offer Approvals		TAOT01555	31.10.2024	A001		31.10.2024 11:37
Offer Approvals		TAOT01555	31.10.2024	A001		31.10.2024 11:37
Offer Approvals		TAOT01555	31.10.2024	A001		31.10.2024 11:38
Offer Approvals		TAOT01555	31.10.2024	A001		31.10.2024 11:39

Requests

When changing the salary with a multiline request, the contract line is updated.

A marker field "Add Contract Line" has been created on the multiline entry types page.

Multiline Entry Types (HRM4Baltics)

✓ Saved

🔍 Search + New 📝 Edit List 🗑 Delete

Code ↑		Def...	Loc... ▼	Limit Value	Value Req...	Max Value Allowed	Over and Equal Connected No.	Under Connected No.	Default Action	Add Sala... By Stru...	Update Exsisting Salaries	Cre... Req... Files Set	Add Em... To Event	Allo... only on pro...	Show Curr... Wor... Fact...	Show Curr... Salary	Add Contract Line
→	⋮	☐	☐		☐				Add	☐		☐	☐	☐	☐	☐	☐

When the marker is active, contract lines are created on the employee's contract card for the rows described in the request.

The dates for the contract line are taken from the request, while other information is pulled from the previous contract line. If multiple contract lines are associated with the salary, the user is prompted to select which contract line to close.

A maximum value limit has been set for the workload change request

A new marker field, "Max Value Allowed," has been added to the multiline entry types for multiline request.

Multiline Entry Types (HRM4Baltics)

🔍 Search + New 📝 Edit List 🗑 Delete

Code ↑		Connected No.	Qty Connected No.	Value	From Date Fromula	To Date Fromula	Min To Date Fromula	Def...	Loc... ▼	Limit Value	Value Req...	Max Value Allowed
→	⋮							☐	☐		☐	

The suitability of the value is checked when submitting the request, not when entering the value. This check applies only to numeric values and is valid for transaction types related to Percentage, Salary, Contract, Journal, Cost, and Entry.

ERP HRM CRM BI
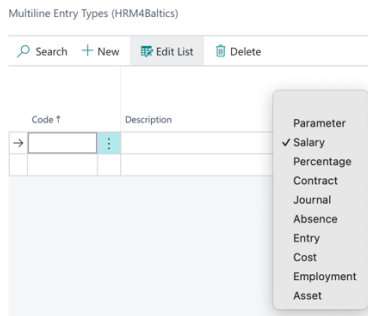
A personnel specialist can reject a resignation application

The multiline request subtype has a setting, "Only HR can reject/Unsubmit".
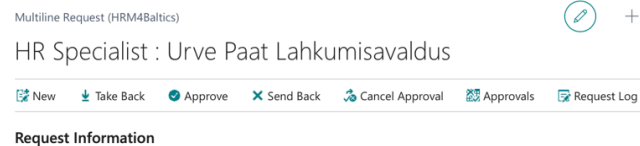

The employee must be marked as a "HR Specialist" under Employee Exceptions.

Then, a "Take Back" button will be visible on the resignation application.

Asset inventory with multiline request

A new field „Inventory Request Subtype" has been created for the asset types, which sets up the base for the inventory multiline request.

Inventory fields have been added to the asset card, which are also displayed in the asset list. The date of the last inventory will be set to the date of processing.

The approver number on the asset card can be set for the asset type. The field „Responsible Type" must also be filled with the value „Employee." Additionally, a marker „Inventoryable" can be activated on the asset type, which determines whether the asset is included in the inventory or not.

Select - Asset Types (HRM4Baltics)   🔍 ∨   ＋ New   ⊞ Edit List   ⋯

Code ↑		Description	Responsible Type	Responsible No.	Inventoryable
→ ARVUTID	⋮	Arvutid	✓ Manager Employee		☑

To create an inventory, the inventoriable assets must be marked in the Asset list, and then the „Create Inventory" button must be clicked.

Assets List (HRM4Baltics)

🔍 Search ＋ New Manage 🕘 History ▼ Expired 💱 Expire (month) 📋 Unused Assets 🔍 Show All FA Card 🖥 FA Location History 👤 Add to Employee ⋯

	Asset Code ↑	Name	Status ▼	Asset Category Code	Asset Type Code	Asset Subtype Code	Asset Number	Previous System No.		
✓	TV0025	Vara1	Active	MUUD	KAARDID		1234		✓ Acquisition	
✓	TV0027	Vara3	Active	MUUD	SÕIDUKID				→ Assign	
									→ Transfer	
									↪ Create Inventory	

Requests are created per employee.

On the request, there are fields for the employee: „Agree". If they do not agree, it is mandatory to fill in the „Reason code" field. Pre-filled reason codes can also be used for describing the reasons. A field for asset value has also been added.

Multiline Request (HRM4Baltics)   ✏️   ＋   🗑

Niina Rattus Varade inventuur

⊞ New   👥 Approvals   📋 Request Log

Request Information

Request No.	TAOT_01757	Asset Action Type	Inventory
Request Subtype	VARA_INV	Current Approver Role	Töötaja ise
Request Name	Varade inventuur	Approval Group No.	INV
Request Status	Waiting Approval	Name	Niina Rattus
Request Date	25.10.2024	Job Title	

Assets

	Asset Owner		Asset Code ↑	Description	From Date	Agree	Reason Code	Reason Description	Asset Value
→	Esmo Aablo	⋮	VA003	Test3	07.10.2024	☐			0,00

A new list „Request Asset List" has been created.

Request Assets List (HRM4Baltics)   🔖 ⬜ ⤢

🔍 Search ⊞ Edit List 📖 Open Request ✓ Approve All 👤 My Approvals 👤 My Asssets   ⬆ ▼ ☰

Request Approval Status ↓	Request No.	Request Date	Asset Action Type ▼	Employee Name	Current Employee No.	Asset Code	Description	From Date	Agree	Reason Code	Rea... Des...	Processed	Processed comment
Completed	TAOT_01710	17.10.2024	Inventory	Niina Rattus	T313	V0002	Laud	02.10.2024	✓			✓	
Waiting Ap...	TAOT_01790	06.11.2024	Inventory	Agatha Eenpalu	T353	TV0029	Vara 5	25.09.2024				☐	
Waiting Ap...	TAOT_01789	06.11.2024	Inventory	Armiida Õnne...	T008	TV0027	Vara3	06.11.2024				☐	
Waiting Ap...	TAOT_01788	06.11.2024	Inventory	Armiida Õnne...	T008	TV0027	Vara3	06.11.2024				☐	

In the „Request Asset List", the asset responsible person can add approvals to requests by using the "My Approvals" button. This allows for handling problematic assets and approving them all at once.

Request Assets List (HRM4Baltics)   ✓ Saved   🔖 ⬜ ⤢

🔍 Search ⊞ Edit List 📖 Open Request ✓ Approve All 👤 My Approvals 👤 My Asssets   ⬆ ▼ ☰

	Request Approval Status ↓	Request No.	Request Date	Asset Action Type ▼	Employee Name	Current Employee No.	Asset Code	Description	From Date	Agree	Reason Code	Rea... Des...	Processed	Processed comment
	Completed	TAOT_01710	17.10.2024	Inventory	Niina Rattus	T313	V0002	Laud	02.10.2024	✓			☐	
→	Waiting Ap...	⋮ TAOT_01790	06.11.2024	Inventory	Agatha Eenpalu	T353	TV0029	Vara 5	25.09.2024				☐	

The asset manager can process assets directly on the request, where fields „Processed" and „Processed comment" are displayed for them.

Under „My Assets," the asset manager can see assets related to their own requests.

Employee

New fields added to the Employee List and Exceptions

The User ID field can be displayed in the Employee List through personalization.

Employees:	All ∨		🔍 Search	+ New	🗑 Delete	Process ∨	Reports ∨	Contract ∨

No. ↑	User ID	First Name	Last Name	Birth Date	Sex
T024		Niina	Rattus	08.09.2003	Male
T098		Esmo	Aabjärv	12.01.1975	Male
T1234		Riikka	Lüüs	18.02.1970	Male
T310		*Viilup*	*Halász*	*02.11.2000*	*Male*
T311		Viivo	Paas	16.11.1979	Male

In Employee Exceptions, both the Employee Number and the Employee Name are displayed.

Employee Exceptions (HRM4Baltics)

🔍 Search	+ New	📝 Edit List	🗑 Delete

Employee No. ↑	Employee Name	HR Specialist
T0015	Sylvester Raud	✓
T0016	Triinu Pömmer	✓
T0017	Mauno Mann	☐
T002	Agatha Eenpalu	✓

Displaying the education level in the employee list/card, vocational education requirement for the position marked as fulfilled without a completion date

Displaying the education level in the employee list and on the employee card.

Employees:	All ∨		🔍 Search	+ New	🗑 Delete	Process ∨	Reports ∨	Contract ∨	Information ∨	Personal I

No. ↑	User ID	First Name	Last Name	Birth Date	Sex	Education Level	
T0015		Sylvester	Raud	09.11.1990	Female	Vocational education	T
T0016		Triinu	Pömmer	02.02.1979	Male		T

Employee Card (HRM4Baltics)

T0015 · Sylvester Raud

New Process Contract Information Personal Info Contact H

🔄 Update   📄 Trust Fund Check   📄 Send to Working Register

Basic Information

No. · · · · · · · · · · · · · · ·	T0015 · · ·
First Name · · · · · · · · ·	Sylvester
Last Name · · · · · · · · ·	Raud
Personal ID · · · · · · · · ·	49011092229
Job Title · · · · · · · · · · ·	Vanemmüüja
Serniority · · · · · · · · · · ·	**10 years**
Education Level · · · · · · · ·	Vocational education

Education level data is displayed based on the following logic:

1. If the employee's education is completed and marked as "Primary," the education level of that entry is displayed. If two entries are marked as "Primary," the education level of the most recently added entry is displayed.
2. If no "Primary" marker is indicated, data is displayed according to the sequence number of Education Level Rankings.
3. If the level rankings are not filled or no education level is indicated on the education entry, the highest level is displayed in the following order: (Lowest - Other - Basic Education - Secondary Education - Vocational Education - Higher Education - Highest).
4. If the employee has an education entry, but the status is not "Completed," the education level is not displayed.
5. In the list of job requirements, vocational education is considered only when managing education levels.
6. If education is completed, a "Graduated" status is sufficient for the level requirement to be considered fulfilled.

T0015 · Sylvester Raud

Educations (HRM4Baltics)	🔍 Search	+ New	📝 Edit List	🗑 Delete	💾 Files	More options

	Starting Year	Starting Date	Date of Graduation	Year of Graduation	Status	Primary	Allow Study Leave	Education Level
→	⋮			2000	Graduated	☑	☐	Vocational education

Employees Profession Requirements List (HRM4Baltics)

🔍 Search Requirements 📝 Edit List Employee Filters

Date	12.11.2024
Include not actives	⬤

Employee No.	Employee Name	Profession No.	Requirement No.	Required Type ▼	Requirement Description	Requirement Info	OK ↓	No.
TRI-0228	Pearu Marino	1020-03	ÜLDINE	Education	Keskharidus		✓	BA
TRI-0198	Rudolf Haavik	1020-03	ÜLDINE	Education	Keskharidus		✓	YKH
T318	Viilup Halász	0200-01	ÜLDINE	Education	Keskharidus		✓	_
→ T1234 ⋮	Riikka Lüüs	1020-03	ÜLDINE	Education	Keskharidus		✓	KHKKB
T014	Riikka Aabjõe	KORISTAJA	TÖÖLINE	Education	Põhiharidus : Üldpõhiharidus		✓	YPH

Working Schedules

The work schedule group filter in filtered views

Filtered views of work schedules (HRM4Baltics) now include an option to set a Work Schedule Group No. filter, enabling filtering across all groups within the organization.

Expense Reports

Currency check for the expense reports

Currency-related field checks for the expense report:

- If the "Currency Code" is selected, it is not possible to manually enter a value in the "Amount" field. Instead, the currency-related amount fields must be completed.
- If the "Amount in currency" field is left empty, the user will receive a notification: " Currency Amount or Currency Code has not been added to line. Please add before submitting the report."
- If a value has previously been entered into the "Amount" field and a value is selected for the "Currency Code", the value entered in the "Amount" field will be deleted.
- If the "Currency Code" is not selected, it will not be possible to enter an amount in the "Amount in currency" field.

The "Currency Factor" column will display the exchange rate of the selected currency.

Interfaces

New fields in the webservice Add Working Schedule project task

Webservice page ID 24008486 two new fields: Project Manager No and Project Manager Name.
Example request:
{

```
    "@odata.context":
"http://palk.westeurope.cloudapp.azure.com:7548/PALK21APPTEST/ODataV4/$metadata#Company('%C3%9Clle%20AS')/
WorkingScheduleJob/$entity",
    "@odata.etag": "W/\"JzE5Ozg3MTA0Mjg3NzE0NDM2Njc0MjgxOzAwOyc=\"",
    "Job_No": "111",
    "Main_Job_No": "",
    "Description": "Projekt BHB",
    "Task_Batch_No": "MALL NR 1",
    "Responsible_No": "T002",
    "Split_Type": "Percentage",
    "Split_Insert_Type": "Keep",
    "Percentage": 0,
    "Expected_Hour_Cost": 0,
    "Substitute_No": "T318",
    "Closed": false,
    "Payroll_Dimension_1_Code": "JUH",
    "Payroll_Dimension_2_Code": "JKO001",
    "Payroll_Dimension_3_Code": "JOGURT",
    "Payroll_Dimension_4_Code": "",
    "Payroll_Dimension_5_Code": "",
    "Payroll_Dimension_6_Code": "",
    "Payroll_Dimension_7_Code": "",
    "Payroll_Dimension_8_Code": "",
    "Connected_Job_No": "BHB",
    "Connected_Task_No": "ÄL",
    "Project_Manager_No": "T002",
    "ProjectManagerName": "Kati Karula",
    "ResponsibleName": ""
}
```

Job No. ↑	Description	Project Manager No.	Job Manager Name	Responsible No.	Main Job No.	Job Type	Department Code	Profession Group Code
111	Projekt BHB	T002	Agatha Eenpalu	T002		Time	JUH	JKO001

VITS interface enhancements

The new configurable field VITS email type added to the Profession Groups. Based on the selected value, the email will be taken from the employee's card. If the selected address is missing for the employee, an error message will be sent to the log.

Code ↑	Description	VITS E-mail Type	Locked
JUHTIMINE	Juhtimine	✓ Company	☐
KONTOR	Kontor	Personal	☐
SPETSIALISTID	Spetsialistid	Both	☐
TÖÖLISED	Töölised	None	☐