HRM4Baltics what's new – December 2024

Events

Displaying the name of the manager of the employee participating in the Event on the Event card, Event request and Offer

An enhancement has been made to the solution on the Event card, Event request card and Offer card, where the manager's name of the employee is displayed in the participant list.

Linking the Expense report approval workflow to the Event category

A new field "Expense Report Approval Group No." has been created for the Event category.

An enhancement has been made to the solution where it checks if the Event category has an approval workflow assigned. If it does, that approval workflow is used; if not, the approval workflow assigned to the Expense report type is applied.

Mandatory fields for the Offers are configurable

A new menu button "Offer Fields Setup" has been added to the Events setup, allowing the configuration of mandatory fields for Offer requests.

Events Setup (HRM4Baltics)

🖥 Categories 📄 Web Request Templates 📑 Expense Templates 📑 Cost Types 📑 Permissions 📑 Offer Fields Setup

Event Request Setup

Event Nos. · · · · · · · · · · SYNDM ▽ Expense Report Nos.

To set mandatory fields, mark the desired fields as "Required" on the opened page.

Events Fields Setup ✓Saved

🔍 Search 📝 Edit List

Table Name		Field No. ↑	Field Name	Required
→ Offer	⋮	4	Offer Date	☑
Offer		8	Organizer No.	☑
Offer		20	Event Description	☑
Offer		25	City Name	☑
Offer		26	Country Code	☑
Offer		27	Country Name	☑
Offer		37	Vendor No.	☑
Offer		39	Web Request Template Code	☑
Offer		136	Expense Template Code	☑
Offer Line		3	Cost Type	☐
Offer Line		4	Cost Description	☐
Offer Line		5	Instructions	☐
Offer Line		102	Days	☐
Offer Line		105	Total Amount	☐

Configuration for status restriction when creating an expense report

A new field "New Expense Report Allowed if" has been created for the event category type and subtype, with the following options:
- New Request -The Event request has not been sent for approval, it is already possible to create an Expense report.
- Submitted Request -The Event request has been sent for approval and only then the expense report card can be created.
- Approved Request - The Event request is approved and only then the expense report can be created.

Event Types (HRM4Baltics) ✓Saved

🔍 Search + New 📝 Edit List 🗑 Delete 📑 Subtypes 🔶 Dimensions 📑 Fields Setup

Code ↑	DefVendor No.	Offer Web Request Template Code	Training Area Code	Training Type Code	Training Subtype Code	Do... Trai...	Allowed Increase Amount	Allowed Increase Percentage	Creation Text	No. of Allowed Expense Reports	Send Reminder	New Expense Report Allowed if
EESTI	H00011					☑	1,00	1,00	uus Eestis toimuv koolitus	1	☑	Submitted Request
→ MAJA	H00012		MEESKOND	KOOLITUS	MAJA	☑	1,00	1,00	uus majasisene koolitus	1	☑	✓ New Request
ÜLDINE						☐	1,00	1,00		1	☑	Submitted Request
												Approved Request

If the Event request is not in the correct status according to the configuration, a warning is displayed when clicking the "Create Report" button:
- The event request has not been submitted; the expense report cannot be created.
- The event request is not approved; the expense report cannot be created.

Notification to managers about event approval

An enhancement has been made to the Event approval workflow, allowing the configuration of a notification email to the manager's superior, who is not included in the approval workflow.

For the solution new "Approver Type" options have been added to the approvers page:
- E-mail to Manager
- E-mail to Manager's Manager

- **E-mail to Management**

Approvers (HRM4Baltics)

Sorting No. ↑		Approver Description
1		Kalle Kolmas
→ 2	✓ Employee	Karmen
3		Karula

Substitutes/Employees
Manager
✓ Employee
Job
Holiday Approver
E-Mail
Resposnible
Submitter
Project Manager
Head of Structure 1
Head of Structure 2
Project/Asset Resposible
Substitutes Managers/Employees Managers
Submitter Manager
Fixed Asset Responsible Employee
Level 1 Manager (by Line Dimension)
Level 2 Manager (by Line Dimension)
Level 3 Manager (by Line Dimension)
Level 4 Manager (by Line Dimension)
Owners
E-Mail to Manager
E-Mail to Manager's Manager
E-Mail to Management

A new configurable field "Email Template (Managers & Management)" has been added to the "Approvers" page.

Approvers (HRM4Baltics)

A "Valid for Countries" field must also be configured for the approver, with options for EU and Non-EU.

Approvers (HRM4Baltics)

Sorting No. ↑		Approver Type	Approver No.	Approver Description	Notify Event Prepayment	Valid for Countries
→ 1	⋮	Employee	T003	Kalle Kolmas	☐	✓
2		Employee	T001	Karmen	☐	EU
3		Employee	T002	Karula	☐	Non-EU

Note! On the Countries/Regions page, it is necessary to configure for each country whether it belongs to the EU or not in the "Expense Report Country Type" field.

Countries/Regions

Code ↑	Name	ISO Code	ISO Numeric Code	Address Format	Contact Address Format	County Name	EU Country/Re... Code	Intrastat Code	VAT Scheme	Taxonomy Classification	Expense Report Country Type
→ AE	Araabia Ühendemiraadid			City+Post Cod	After Company						Non-EU
AT	Austria			Post Code+...	After Compa...		AT	AT			EU
AU	Austraalia			City+County...	After Compa...						EU
BE	Belgia			Post Code+...	After Compa...		BE	BE			EU

A new configurable field "Email Template (Managers & Management)" has been added to the approval workflow, where the required template can be configured.

E-mail templates

Need to Approve E-Mail Template	KULUARUANNE	Need Complete E-Mail Templ.	
Reject E-Mail Template		Completed E-Mail Template	
Cancel Approval E-Mail Template		Stop Approval E-Mail Template	
Approved E-Mail Template	ARUANNE KINNITATUD	Message E-Mail Templ.	
Cancel E-Mail Template		Event Prepayment E-mail Template	
Change E-Mail Template		E-Mail Template (Managers & Management)	

ERP HRM CRM BI

A new email template has been created, which can be selected in the previously described field.

Customizations to the appearance of the Offers card

A new field "Vendor Offer No." has been added to the Offer card, where the offer number can be manually entered.

Change in the logic of the header information order for the Offer: Offer No. · Event Request Offer · Start-End · Country · Event Name.

As an enhancement to the approval status fact box, two separate blocks have been created: Cooperation and Approval. Different colors are used — red is displayed for persons who are unapproved/in coordination or need approval/coordination, green is displayed for persons who have approved/sent for coordination or the submitter's names, and blue is displayed for names of persons who have coordinated.

Support for dimensions has been added to the event card and approval workflow

A new field "Employee Dimensions" has been added to the "Event Participants" block on the event card, where the employee and event-based dimensions can be viewed, which are checked in the approval workflow.

Event Card (HRM4Baltics)

Koolitus · 17.01.25-17.01.25 · Eesti · Training

⚙ Dimensions   🔄 Create Offer   🔄 Offers   👥 Participants   📁 Requests   👤 Create One Request   👥 Create Requests   📧 Send Messages   💰 Cost Entries   📋 Jobs   📄 Make a Copy   ⋯

Event | **Event Offers** | **Request** | **Approved** | **Cost Reports**
One participant | Missing | 1 request | 0/1 Approved | 0/1 Approved Cost: 0

Event Type ›

Event Information ›   Eesti   17.01.2025   17.

Event Participants | Manage   Employees   Event Request   Fewer options

	Employee Name ↑	Employee Manager Name	Tööpere Name	Grupp Name	Employee No.	Employee Dimensions
→	Hannes Koosla	⋮ Mari Murakas	–	–	A003	TUR,KOOLITUS,MUSTAMÄE,SPETSIALIST,FIN,A003,KILE...

SYNDM0321 · Training · A003 · Hannes Koosla

Event Participant Dimension | 🔍 Search

Dimension Code ↑	Dimension Value Code
ALLÜKSUS	MUSTAMÄE
AMETIGRUPPP	SPETSIALIST
PROJEKTIJUHT	A003
TÖÖTAJA	A003
OSAKOND	TUR
TEGEVUS	KOOLITUS

Requests

Intelligent notification and information on the quick info pane for the rejection of expense reports, vacation requests, and event requests

A configuration has been created on the "My Notifications" page for the rejection of expense reports, holiday requests, and event requests. It can be managed on a user-specific basis.

Edit - My Notifications

🔍 hrm ✕	📝 Edit List			

	Notification		Enabled	Conditions
→	Hoiata kui sündmuse taotlus on tagasi lükatud (HRM4Baltics)	⋮	☑	–
	Warn if the Holiday Request has been rejected (HRM4Baltics)		☑	–
	Hoiata kui kuluaruanne on tagasi lükatud (HRM4Baltics)		☑	–

When the "Allowed" marker is activated, the rejection notification is displayed in the request header and the fact box including the full extent of the notification, along with the name of the person who rejected it.

Holiday Request (HRM4Baltics)

HR Specialist : Kalle Kolmainus 01.02.22-22.02.22 Puhkus

✕ Request has been rejected by Kalle Kolmainus. ei luba.   Don't show again

📝 New   ⏱ Submit   ✕ Cancel Holiday   🗑 Delete   📊 Approvals   📋 Request Log   📅 Holiday Balance   📆 Vacation Expirations   📋 Absence   📋 Cause of Absence   ⓘ

Request Information   Show less

Request Name	Puhkus	Current Approver Role	
Request No.	PUHK0000061	Approval Comment	*ei luba*
Request Status	*Rejected*	Employee No.	T003
Request Date	21.01.2022	Name	Kalle Kolmainus
Holiday Journal Name		Job Title	Vanemraamatupidaja

(There is nothing to show in this view)

Approval Status

Rejected
Kalle Kolmainus
ei luba

Instructions ›

The resignation request title now displays the departing employee's number and name

The Resignation Letter title now displays the departing employee's number and name.

If the request submitter is the first approver, the request can be configured to be automatically approved

A new field "Allow Auto Approve" has been added to the approval workflow configuration. If the value "First Approver is Submitter" is selected, the request is automatically approved.

Employee

An Address Assistant has been added to the Employee and Workstation Code cards

When entering an address on the Employee card, it is possible to use the Address Assistant.

To use this functionality, the HRM4Baltics Connection App must be utilized and the "Enabled" marker must be activated in the Address Search configuration.

Working Schedule

A new Summarized Hours field has been added, which aggregates hours across working schedule groups

A new Summarized Period Hours field has been added to the working schedule, which calculates the total hours worked by the employee across all schedules.

Working Schedule (HRM4Baltics)

Hannes Koosla 01.12.24-31

Employee   Working Schedule   Planning   On

👤 Employee Card   🗓 Employee Free Days

Töötajad   Filtrite loend   Uuenda vaadet

Tootmine2   ◀ December 2024 ▶   Show: ☑ H

Employee Name	Profession Desc.	Nominal Hours	Total Hours	Difference	3 months in Groups (diff.)
Hannes		146h	148h	2h	-539,5h
Kalle Kolmas		149h	145h	-4h	-181h
Mari Murak	Juhatuse	112,6h	116,5h	0h	-114,3h

To display the field in the working schedule, the configuration must be done at the working schedule group by selecting Formatted UX Template->Fields page.

Fields (HRM4Baltics)

🔍 Search   📝 Edit List   🗑 Delete   📰 Show Selected   📰 Show All

Field No. ↑	Field Name	Sorting No.	Visible
181	3 months (nominal)		☐
182	3 months (add.)		☐
183	3 months in Groups (diff.)	503	☑

When registering a Working Schedule, the plan is required

A new additional setting "Plan Required (All entries)" has been created for the working schedule posting group. When the marker is enabled, the monthly hours cannot be approved until each entry is associated with a schedule plan.

Working Schedule Posting Groups (HRM4Baltics)

🔍 Search   ➕ New   📝 Edit List   🗑 Delete

Code ↑	Description	Groups	Plan Required (All Entries)
→ ⁝ TOOTMINE ⁝	Tootmine	2	☐
LISATASU	Lisatasu	_	☐

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A new field "Modified Hours" has been added to the working schedule view, where the hours that have been modified compared to the approved plan are displayed.

By clicking on the hours, the working schedule entries page opens, where it is possible to view the unapproved plan hours.

Self-Service portal

An addition has been made to display dimensions in both the Employee Portal and the simplified Employee Portal list

To display dimensions in the portal and the simplified list, configuration must be made on the "Employee List Fields setup" page:

Employee List Fields Setup (HRM4Baltics)

View Type ↑	Field No. ↑	Field Name
Portal Employee	200	Tase 2
Portal Employee	210	Tase 2 nimi
Portal Employee	1010	Palga dimensioon 1 tähis
Portal Employee	1020	Palga dimensioon 2 tähis
Portal Employee	1030	Palga dimensioon 3 tähis
Portal Employee	1040	Palga dimensioon 4 tähis
Portal Employee	1050	Palga dimensioon 5 tähis
Portal Employee	2010	Palga dimensioon 1 nimetus
Portal Employee	2020	Palga dimensioon 2 nimetus
Portal Employee	2030	Palga dimensioon 3 nimetus
Portal Employee	2040	Palga dimensioon 4 nimetus

An enhancement has been made to the portal access rights template

A new marker field "Allow Processing" has been added to the Permission Lines page of the portal access rights template. This field affects the HR role and works in conjunction with multiline requests.

Salary

A Contract group and its connection to salary have been added

It is now possible to select predefined contract groups for a contract.

It is possible to configure different salary tariffs for the group, which will be automatically applied to all employees who are assigned the corresponding group to their contract line.

Contract Group Card (HRM4Baltics)

HARJU

Contract Group Lines Update Employees (active contracts)

Contract Group

Code	HARJU	Employees	
Description	Harju	Locked	
Conract Lines			_

	Contract Group Lines	Manage								
	Valid From	Valid To	Value Type	Value No.	Descripti…	Amount	Use Wor… Fact…	Salaries	Default Dimensions	
→	15.01.2025	⋮		Salary	TASU_KUUPA…	Kuupalk, …	1 500	☐	_	☑

A new field "Employees" has been added to the contract group page, where you can see how many employees have been assigned the contract group.

Select - Contract Groups (HRM4Baltics)

	Code ↑		Description	Lines	Conract Lines	Locked ▼	Employees
→	HARJU	⋮	Harju	1	_	○	_

Enhancements to the Salary change journal

In the salary change journal, it is now possible to modify multiple salaries at once. To do so, you need to configure the desired salary types in the "Salary Type" field.

Salary Change Journal (HRM4Baltics)

Batch Name	TLN	Salary Type	TASU_KUUPALK|TASU_TUND
Date		Amount Type	Percentage
Description		Amount	0,00
Create New Contract Lines	⬤		

Contracts

The contract printout date format is now configurable

A new field, "Contract Printout Date Format," has been added to the payroll settings, allowing you to control the format of the contract printout date according to the company's specific requirements.

Payroll Setup (HRM4Baltics)

Periods   Structure   Notifications   Tax Declaration Setup   Related Dimensions   Actions ⌄   Fewer options

Sunday Nominal Hours

Global Settings

Trust Fund Interface		Resource	
Trust Fund 1%	PEN1	Hide Resource Button	⬤
Trust Fund 2%	PEN2	**QR Code**	
Trust Fund 3%	PEN3	Automatic QR Code	⬤
Trust Fund 4%	PEN4	QR Code Lenght	
Trust Fund 6%	PEN6	**Contract Print**	
Bank		Contract Print Date Format	<Day>.<Month Text> <Year4> <Quarter>

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The possible values and the resulting display will appear when you click on the described field "...".

> (i) Allowed values for Date format
> Day, Month, Month Text, Quarter, Year, Year4, Week, Week Year,
> Week Year4, Weekday, Weekday Text
>
> <Day,2>.<Month,2>.<Year> = 05.04.21
> <Day,2>.<Month,2>.<Year4> = 05.04.2021
> <Day>. <Month Text> <Year4> = 5. April 2021.
> Default value is <Day,2>.<Month,2>.<Year>
>
> Current format results: 17.January 2025 1

Rewards

The relationship between the Reward category and the Reward type

A setting "Connected category" has been created for the reward type.

When creating reward for an employee, if a category is selected that is not linked to any reward types, the list of reward types will be empty, and it must be set manually.

The entire Reward history of the employee, based on the reward type, will be visible to the manager

A new setting has been created for the reward type: "Allow History in Portal To Manager." When the marker is enabled, the manager can view all rewards of the employee associated with this reward type, including from periods when the employee was not yet part of the manager's team.

Holidays

Enhancements to the Holiday Schedule based on Absence reasons

Three new fields have been created for the Absence reason:
- Exception Age of toddler
- Exception Age of toddler (For school age children)

- Calculate End Date Balance

Cause of Absence Card (HRM4Baltics)

P_PUHKUS

🗓 Holiday Setup   🗓 Update Entries Quantities

Holiday Schedule

Balance Type	Month
Balance Account No.	3510
Check Longest (Days)	14
Check Weekend	3,50
Exception Age of Toddler	2
Exception Age of Toddler	6
Calc End Date Balance	⬤
Holiday Schedule UX Main Absence	⬤

The created fields are used to display information in the "Exceptions" field of the Holiday schedule.

Holiday Schedule (HRM4Baltics)   ✓ Saved

Batch Name   2025

Manage   New   Excel   Substitution   Posting   Absences   Actions ∨   Reports ∨   Fewer options

Employee No.	To Date	Days	Holiday Code	Description	Holiday Payment	Posted	Last Check Message	Exception	Profession No.	Osak
→ T001	31.01.2025	5	P_PUHKUS	Puhkus	Payday	No	Puudub 14 päevane puhkus\Nõutud 1,43 nädalav...	Alla 7-aastane laps	1020-01	10
T012	27.02.2025	8	P_PUHKUS	Puhkus	Payday	No	Puudub 14 päevane puhkus\Nõutud 2,57 nädalav...	Alla 7-aastane laps	0200-01	13

A new information box for absences in the fact box and a comment line have been added to the Holiday request form

It is possible to display a comment line on the Holiday request form, requiring the activation of the "Show comment" marker on the Request Types page.

Request Types (HRM4Baltics)

🔍 Search   🖉 Edit List   🗑 Delete   Process   Reports

Request Type ↑	Request Nos.	Inital Date Formula	Upper Text	Bottom Text	Reje... Co... Req...	Show Comment
Employee Form	FALK_TAOT				☑	☑
Holiday Request	PUHKUS		Two		☑	☑

A new information box "Holiday Requests" has been added to the fact box, displaying absences registered in the Absence journal for the current year.

Holiday Request (HRM4Baltics)   ✓ Saved

Hannes Koosla 15.01.25-16.01.25 Puhkus

➕ New   📤 Submit   🗑 Delete   📊 Approvals   📋 Request Log   📊 Holiday Balance   📊 Vacation Expirations

Request Name	Puhkus	Current Approver Role		Calendar ∨
Request No.	PUHK0000166	Employee No.	A003	January 2025
Request Status	New	Name	Hannes Koosla	E T K N R L P
Request Date	15.01.2025	Job Title		1 2 3 4 5
Holiday Journal Name				W 2 6 7 8 9 10 11 12

Instructions >

Holiday Type	PUHKUS	Comment		W 3 13 14 15 16 17 18 19
Starting Date	15.01.2025			W 4 20 21 22 23 24 25 26
Holiday Duration	2	Verification		W 5 27 28 29 30 31
Ending Date	16.01.2025			NB! 31.12.24 3h shorter
Holiday Payment	Payday	Used Holiday Days	2 days	Uusaasta 01.01.25
Automatic Complete	◯	Balance at date 31.12.25	41,5 - 0 - 2 = 39,5 days	
Public Authority Right Ceased	⬤	Request Filename	Add request file	Holidays Requests ∨

Holiday
15.01.25 - 16.01.25 PUHKUS [New]

Reports

Salary analyses support up to 100 columns

Support for configuring up to 100 columns has been added to salary analysis types for:
- Accounts by dimensions
- Employees by accounts
- Employees by calculations

Insiders

Enhancements to the Insider List

Two new fields have been added to the Insider List: "Declaration of economic interests Due Date" and "Declaration of economic interests submitted," along with a new button "Change Due Date of Declaration of economic interests".

To enable the completion of the „Declaration of economic interests Due Date" field, a configuration must be made on the „Payroll Cause of Insaider Addition" page, under the field „Declaration of economic interests Due Dateformula".

When the configuration is made on the specified page, the " Declaration of economic interests Due Date " field will automatically populate with the date according to the configured formula when adding the employee to the insider list. To change the date, the " Change Due Date of Declaration of economic interests" button on the insider's page must be used.

The "Declaration of economic interests submitted" column will show a date once the employee has submitted the form, and it has been processed by the HR specialist.

If the MHD is not submitted by the deadline, the row will turn red. When the employee submits the MHD, the row will return to black.

Absences

A new button for adding absences has been added to the employee card

A new button "Add Absence" has been created under the "New" menu on the employee card, allowing you to directly register an absence for the employee in the absence register from the employee card.

Dimensions

The configuration for the vendor related dimensions

A new type "Vendor" has been added to the "Related Dimensions" page in Payroll Setup, along with a marker

field "Do not update."

When the "Do not update" marker is enabled for the vendor dimension, the vendor dimensions will not be updated if the dimensions on the employee card are modified.

Payroll Entry

A new button "Add Payroll Entry" has been added to the employee card

A new button "New Payroll Entry" has been added under the "New" menu on the employee card. This allows users to directly register a payroll journal entry for the employee into the payroll database from the employee card.

Edit - New Payroll Entry (HRM4Baltics) - Holger Saviauk

Posting Date	20.01.2025
Document No.	PAYROLL 20.01.25
Type	Normal
Account No.	1224
Employee No.	A001
Employee Name	Holger Saviauk
Employee Status	Active
Payment Type	10
Amount	10,00
Description	Additional salary
Accounting Period	2025-01
Payment Period	2025-01
Calculation Period	2025-01

OK   Cancel

Trainings

The changes made to the opening of the training feedback card

The opening of the training feedback survey has been made more convenient, allowing the survey sent via email to be directly opened in an editable view.

Please fill feedback for training Personalijuhtimise aastakonverents

B   BCS Itera Business Central

To: Mon 1/20/2025 9:55 AM

Please fill feedback for training Personalijuhtimise aastakonverents
Questionnaire is located here.

↩ Reply   → Forward

Personalijuhtimise aastakonverents - Hannes Koosla   ✓ Saved

Questionnaire Answers   🔍 Search   ▦ Edit List   ➔ Submit

Type	Description/Answer	Set
Question	**How much I enjoyed it?**	☐
Answer	5	☐
Answer	4	☐
Answer	3	☐
Answer	2	☐
Answer	1	☐

To use this feature, the marker must be activated in the Payroll Setup under the field "Skip Training Feedback Card."

Payroll Setup (HRM4Baltics)

▦ Periods   🔗 Structure   🖳 Notifications   🗎 Tax Declaration Setup   ⚙ Related Dimensions   Actior

Trust Fund 3%	PEN3
Trust Fund 4%	PEN4
Trust Fund 6%	PEN6

Bank

Bank Payment Type	Multiple Banks
Use SEPA Salary Payment	🔵
Use Payment Register	⚪

Training

Education Numbers	KOOLITUS
Training Plan Nos.	
Training Over Companys Nos.	%1-%2
Training Document Nos.	KL-DOK
Default Training Feedback Questionnaire	KÜSIMUSTIK
Skip Training Feedback Card	🔵

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