

Sparkrock 365

Spring 2020

June 2020 *revision 1*

Sparkrock Inc.

SPARKROCK  365

Sparkrock 365's Spring 2020 release introduces exciting new functionality. In this guide, you will discover the most important things about this release.

Top things to know

This release introduces Expenses and Claims to Sparkrock 365.

The Finance Approval process was enhanced to support additional approvals for over budget requests, as well as the option to configure direct manager approvals instead of, or in addition to, the rule-based approvals.

Highlights

Platform

- Microsoft Dynamics 365 Business Central updated from 15.4 to 16.0.
- Restrictions on selection of Role Centers were relaxed to enable the base platform (Microsoft) role centers to be enabled and then selected by users, if desired. The default Dynamics 365 Business Central role center for Business Managers is made available by default alongside the Sparkrock 365 role centers.
- The Product Videos feature of the Role Centers was enhanced to present videos relevant to the selected role.
 - A *Getting Started with Sparkrock 365* video was added for all roles and a *Functional Overview* video was added for Accounting Managers.

Finance and Procurement

- [Expense Claims](#)
- [Direct Approvers for Finance Requests](#)
- [Improved email notifications for Alternates](#)
- [Fixed Asset improvements](#)
- [Over Budget approvals](#) for Purchase Requisitions, Payment Requests, and Expense Claims added
- Sparkrock 365 now supports [Purchase Receiving attachments](#) and these can be viewed on the Posted Purchase Receipt
- Support for [Gross Unit Cost was added to Payment Requests](#)
- [Approval History](#) was made available on Archived Finance Requests
- Extended the platform's new ability to print documents directly to document attachments using the **Attach as PDF** action to encompass Purchase Requisitions and Payment Requests

HR Management

- [mySparkrock Profile](#) employee updates
- mySparkrock [Absence Request Cancel and Reopen](#) workflows
- [Pay statement improved](#) with additional information
- The HR Request for [Gradual Return to Work can now be reversed](#)
- [Paycheck improvements](#) including MICR line support
- [Vendor Payables from Payroll](#) new Payable Posting Option

Scheduling and Time Entry

- [Account Set adjustment](#) in G/L Allocations for Scheduling and Time Entry
- Unit Supervisors can change shift [Work Dates](#) in mySparkrock
- [Shift Trading](#) enabled
- [Position and Activity selectors](#) and position tooltips on the mySparkrock Timesheets page
- [Time Entry Email Reminders](#) use the Time Entry Unit's Submit Date and Approval Date fields
- A scenario that could produce a cascade of messages (one per entry) when deleting multiple shifts from the Compensation Journal was resolved

Upgrade considerations

- In **Advanced HR Setup**, the **Week Start** field could be changed after initial setup, even if the solution was in the midst of processing various types of entries. Doing so could cause time entry line data to be orphaned. The upgrade process will detect and resolve any resulting bad data. Note that the **Week Start** field can no longer be changed if non-posted time entry records are present in the system.
- It is now required to have the General Business Posting Group completed on the vendor record when creating any purchase document. This is a platform level change. This value can be set on the Invoicing FastTab of the Vendor card (Under *Posting Details*, labelled as **Gen. Bus. Posting Group**).
- Permission sets were updated to include new tables:
 - Permission Set: SRNP FULL ACCESS
 - Table 23068801 "SRNP Leave Pay Check Setup"
 - Permission Set: SRW FULL ACCESS
 - Table 23068656 "SRW Empl. Absence Wksh. Line"
 - Table 23068725 "SRW External Change Header"
 - Table 23068726 "SRW External Change Line"

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 platform¹ which powers Sparkrock 365 has been updated from 15.4 to 16.0.

Finance and Procurement

Over Budget Approvals

In this release you can configure Finance Approval Rules with Approval Type of Budget for any or all of Purchase Requisitions, Payment Requests, or Expense Claims. As a prerequisite, the dimension values for the respective dimensions must have budget checking enabled for over budget approval rules to be successfully configured. The amount threshold on the rule specifies the amount over the budget that triggers the approval workflow. Note: Over budget approval takes place after all amount approvals are completed.

Direct approvers

Direct approvals can be specified in addition to, or instead of, the amount and/or budget approvals. The direct approval relationships are specified on an individual user basis. Either a single mySparkrock user or an approval group can be specified on the mySparkrock User Setup card, on the Finance Direct approvers FastTab. For each supported document type (Purchase Requisitions, Payment Requests, and Expense Claims) you can specify a **Sequence of Approval** via **Financial Approval Setup**. You can specify direct approvers, approval rules, or both, and for both whether direct approvals precede or follow those driven by the approval rules. You can use myAlternates to specify direct approval alternates.

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

Finance Approval Setup

Document Types

Document Type ↑	Sequence of Approval	Enabled
Purchase Requisition	Approval Rules	<input checked="" type="checkbox"/>
→ Payment Request	Approval Rules	<input checked="" type="checkbox"/>
Expense Claim	Approval Rules	<input checked="" type="checkbox"/>

Document Type ↑	Sequence of Approval	Enabled
	<ul style="list-style-type: none"> Approval Rules <li style="background-color: #e0e0e0;">Direct Approver Approver then Rules Rules then Approver 	

Improved email notifications for Alternates

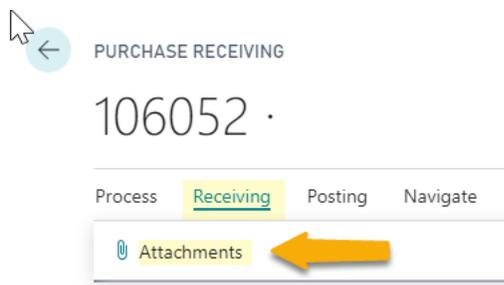
When acting as an alternate, the creator of a requisition may be different than the requestor. In this scenario, if the creator is still an active alternate as per the date range specified, the creator will be sent an email (as an alternate) at the same time as the requestor.

Fixed Asset improvements

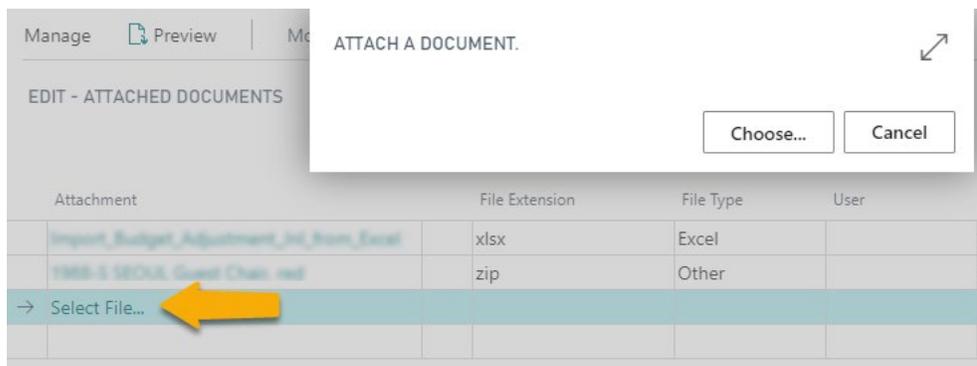
- When an existing asset is later marked as a Pooled Asset, a unique ID is assigned to the acquisition and depreciation entries so you can calculate depreciation.
- Depreciation is now calculated correctly for pooled assets after an asset has been changed from a regular to pooled asset.
- The system will now allow less than reclassing TCA enabled assets when the percent of acquisition cost is not 100%

Purchase Receiving attachments

The Department Manager can add attachments in Purchase Receiving and these can be viewed on the Posted Purchase Receipt by both Department Managers and Purchasing personnel. Choose Receiving, Attachments to add or manage attachments. Attachments are transferred to Posted Purchase Receipts upon posting. Choose Receipt, Attachments to view and manage attachments from a posted purchase receipt.



To add a new attachment, click a blank line to be prompted to select a file.



Gross Unit Cost on Payment Requests

Expense Types can be configured to allow users to enter the amount including tax on payment request lines. There are two related settings on the expense type:

- **Gross Amt Pmt Request** (a toggle)
- **Gross Unit Amount**

When **Gross Amt Pmt Request** on the expense type is toggled on, **Gross Direct Unit Cost** appears on the lines and is editable. **Unit Cost** is not editable. The Gross Direct Unit Cost on the line defaults from the Gross Unit Amount on the expense type.

Approval History on Archived Finance Requests

Approval history of archived requests is now available. Auditors can verify that each document went through all necessary approval steps. To see the approval history, on an archived request, choose **Navigate, Version, Approvals**.

Expense Claims

A major capability introduced in this release is Expense Claims. Data entry is performed in mySparkrock under **My Self Service**, and approvals are performed in the **Department Manager Role Center** in the core product.

Expense claims are created in mySparkrock. Users start by creating the expense claim and adding expense lines to it and then submit it for approval. You can work with your own expenses, as well as those of anyone that has designated you as an alternate. A special expense type exists for distance (mileage) claims. Taxes are automatically calculated based on the Purchase Location but can be overridden if necessary. Submitted expense claims are sent to the defined approver(s), who can either approve or deny the request through the **Department Manager Role Center**.

The security model for Expense Claims works differently in mySparkrock than it did in Sparkrock 2016.

- The security model now only applies when lines are being created or edited in mySparkrock.
- mySparkrock users can only view claims for which they are the requestor. This list is **not** filtered by security so that a full history of prior claims is available, even if the user's security has changed (as a result of a new position or location, for example).
- When acting as an alternate, users can only view claims which they have created on behalf of the requestor (that is, for the user on whose behalf they are acting as alternate).

Approvers on the **Department Manager Role Center** can see a list of expense claims filtered by their security settings. When approving a claim through **Requests to Approve**, if the approval was created by an approval rule, security settings are applied. When acting as an alternate, security is applied based on that of the requestor (that is, for the user on whose behalf they are acting as alternate). If the approval was created

for direct approval, the approver (or alternate) can see the entire document with no security applied.

In this first release of expense claims, some capabilities are not yet completed. These will be added in future releases:

- Expense Claim archives
- Tracking mileage (total mileage Year To Date) displayed on the claim
- mySparkrock features
 - Unassigned expenses (lines not attached to a claim) and related actions
 - Budget collapsible section (view Budget Checking information)
 - Approvers collapsible section (view Approvers information)
 - Account Set validation (account sets are supported to populate dimensions)
 - Private Templates
 - Copy Claim
 - Copy Lines
- Purchasing Cards (credit card import)

One minor capability that was provided in Sparkrock 2016 / Employee Center will *not* be supported in Sparkrock 365, which is the ability to associate URLs with individual expense lines. This was typically used in cases where an external document management system held related expense documents. Supporting documents can be attached directly to the expense claim lines.

HR Management

Pay Statement Improvements

Pay statements were improved with the ability to add additional information for absences and salary deferrals.

- On the **Primo Payroll Integration Setup** page, in the **Payroll Processing** FastTab, the field **No. of Leave Pay Check Codes** provides a drill-down where you can select which causes of absence will display on the pay check stub, and optionally enter a short text description for each one. Use the **Print Leave on Pay Check Mode** selector to choose whether to omit leave details, print balances only, or print full details.
- In the same FastTab, turn on the **Print Deferred Salary on Pay Check** toggle to include salary deferral information.

Primo Payroll Integration Setup

Process Procedure Events

Payroll Processing

Activate Employee De...

Activate Benefit Plan ...

Enable PGP Encryption

Sync Vendor Bank Acc...

No. of Leave Pay Chec...

Print Leave on Pay Ch...

Print Deferred Salary ...

Print Comp. Time on ...

Print MICR Line on Pa...

Reversing Gradual Return to Work

The **HR Request** Reverse function can be used with *Gradual Return to Work* HR Requests. See [Reversing HR Requests](#) in the [Customer Success Center](#) for steps.

Vendor Payables from Payroll

The process of processing a vendor payable entry from payroll was enhanced to provide an option that does not include the employee number, to protect personal identification information.

Paycheck improvements

- Added the company logo.
- Added MICR line support: check, transit, and account numbers.
- Added the ability to view leave in detail on the paycheck stub.

mySparkrock absence request workflows

The Cancel and Reopen workflows were implemented for Absence Requests.

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. When a change is pending, a *Pending Changes* collapsible section will appear on the page. Only one pending change is permitted at a time for any employee.

Once submitted by the employee, the change must be reviewed and approved (or denied) by the Human Resources Manager. To do so, search **Tell Me** for **mySparkrock Changes** OR use the MYSARKROCK CHANGES cue in the PENDING FOR HR panel on the **Human Resources Manager Role Center**.



The **MYSARKROCK 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.

Scheduling and Time Entry

Account set adjustment

In Scheduling and Time Entry, when lines are pulled into the compensation journal, any dimension values present on an activity override the default values that come from the assignment allocation. This could cause an inconsistency between the account set on the G/L Allocation and the G/L Account on the line. Now, when a scheduling or time entry activity is pulled into the compensation journal, the account set is recalculated based on the values on the G/L Allocation line. If no match is found, the account set will be blank.

Shift Trading

The employee Shift Trading feature is now enabled in mySparkrock. See the [Shift Trading](#) article on the Sparkrock [Customer Success Center](#) for full details on this capability. This capability is controlled by the *Allow Shift Trades* setting on the *External Settings* FastTab of the **Schedule Unit Card**. The default behavior when creating new units can be set on the *Schedule Unit Defaults* FastTab of the **Schedule Setup** page.

Schedule Setup

Schedule Unit Defaults

Area Code	<input type="text" value="SOUTH"/>	Lunch Deduction Thr...	<input type="text"/>
Default Pay Cycle Code	<input type="text" value="BIWEEKLY"/>	EMPLOYEE CONTROLS	
Next Day for Overnig...	<input checked="" type="checkbox"/>	Can Create Shifts	<input checked="" type="checkbox"/>
Offer Acceptance Type	<input type="text" value="Automatic"/>	Can Split Shifts	<input checked="" type="checkbox"/>
Shift Change Date Tol...	<input type="text" value="None"/>	Allow Change Reques...	<input checked="" type="checkbox"/>
Allow Shift Bids	<input type="checkbox"/>	Allow Activity Changes	<input type="checkbox"/>
Allow Shift Trades	<input checked="" type="checkbox"/>	Can Edit Pay Controls...	<input type="checkbox"/>
Open Trading Period ...	<input type="text" value="0"/>	Default Lunch Break (...)	<input type="text"/>

Work Date Change

When allowed, Unit Supervisors can change a shift's Work Date in mySparkrock from the **Shift Details** page. Simply click the calendar icon beside the Work Date and a date selector will appear. Note that the range of new dates the Unit Supervisor can pick from is controlled by the *Shift Date Change Tolerance* setting on the **Schedule Unit Card**. To prevent Unit Supervisors from changing a shift's Work Date, set *Shift Date Change Tolerance* to None.

Shift Details - Published

- DETAILS

SHIFT

Work Date:

04/16/2020



Start Time:

End Time:

Duration:

Lunch Break:

Comments:

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

SCHEDULE UNIT CARD



General

Area Code	SOUTH	Guidelines	
Code	CHARLIE	Default Activity	ACT1
Description	Charles Nelson Unit	Next Day for Overnight Activities	<input checked="" type="checkbox"/>
Location Code	WEST	Offer Acceptance Type	Automatic
Default HR Pay Cycle Code	BIWEEKLY	Lunch Deduction Threshold	6.00
Is Unavailable Unit	No	Shift Change Date Tolerance	Current Week

External Settings

Allow Shift Bids	Show Employee Contact on Sch...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



None

Current Week

Current Pay Cycle

Time Entry Email Reminders use Time Entry Unit’s Submit Date and Approval Date fields

A Time Entry Submit reminder email reminds employees when their time sheets need to be completed and submitted for approval. A Time Entry Approval reminder email reminds approvers that time sheets have been submitted and they need to review and approve them before they can be processed by payroll.

The Time Entry Unit formula fields **Submit Date Calculation** and **Approval Date Calculation** are now used to generate email reminders to the employee/approver.

- **Submit Date Calculation:** Enter a date formula to apply to the Week End Date, to determine the Submit reminder date.
- **Approval Date Calculation:** Enter a date formula to apply to the Week End Date, to determine the Approval reminder date.

Position and Activity on mySparkrock Timesheets page

Position and activity dropdowns have been added to the employee Timesheets page to assist in distinguishing between activities that may be associated with multiple positions. A tooltip has been added to the time entry lines, when you hover over the position it appears and displays the position/activity combination.

Employee	Sun	Mon	Tue
Activity	May 31	Jun 1	Jun 2
Stuart Lloyd Hodgins			
Lunch Room Monitor	0	4.8	4.8
 <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Elementary Principal – Lunch Room Monitor </div>			

Defects corrected

Platform

The base Microsoft Dynamics 365 Business Central platform² which powers Sparkrock 365 has been updated from 15.4 to 16.0.

Obsolete fields were removed from **mySparkrock Solution Setup**.

Finance and Procurement

Requisitions Management

Issues with actions and statuses for requisitions:

- Reopen action was available when it should not have been. It is now limited only to documents with header status: Approved or Cancelled.
- Cancelling lines in a document can now only be done for documents with header status Approved.

When the **Receipt on Invoice** toggle on the **General** FastTab of **Purchases & Payables setup** is turned off, users should be able to enter and post a PI without the PI being linked to a receipt or a receipt being created and posted with the posting of the PI. An error message that stated that *Receiving No. Series must have a value* no longer appears in this scenario.

Users were incorrectly able to delegate approvals to the originator/creator of a **Payment Request** when the **Allow Self-Approval** rule was set to *Never*.

Implemented multiple selections for Approve and Reject actions on approval entries.

² A [detailed list](#) of cumulative platform fixes is available from Microsoft.

The Verify function on **Payment Requests** would report “nothing to verify” when acting as an Alternate. A related issue with missing lines on a Payment Request printout was also resolved.

When acting as an alternate for data entry, the security filters for the user you are acting on behalf of are applied.

When acting as Alternate Approver, a notification related to alternate data entry was improperly displayed when viewing an entry from **Requests to Approve**.

When acting as Alternate Approver, the original Approver's entry was not changed to Approved when the Alternate approved.

Purchase Requisition Lines is now restricted when **mySparkrock User Setup** has **Restricted View of Requests** set to *true*.

The process of correcting security errors in private templates now revalidates and clears errors as they are fixed.

Tax Area Code and Vendor Item No. are copied to **Purchase Request** when created from a Private Template.

When creating a Vendor from Template, the solution did not use the **No. Series** from the Template.

After creating a new Purchase Requisition or Payment Request from a template, the user can open the card page of that new document.

The **Release** action now populates the following fields:

- Requested Approval By with the current user name
- Requested Approval Date/Time with the current date and time
- Approval Date/Time with the current date and time

Purchases & Payables Setup now includes the **Request Template Nos.** on the **Number Series** FastTab.

When using **Copy Document** on a **Payment Request**, the PST Override and GST Override fields are now correctly copied.

A scenario where blocked **Account Sets** were available for selection on mySparkrock was corrected.

Layout problems on the Sales Invoice were corrected.

An error was introduced in the initial version of Spring 2020 when trying to reject an Approval request. A permissions error on 'TableData Approval Entry: Modify' could be reported. This has been corrected. If you experience this error, contact Sparkrock Support for assistance with remediation.

Department Managers

Department Managers could not view Vendor or Expense Type details from purchase requisitions or payment requests, and the Vendor Name was not visible to them on the Payment Requests page.

Department Managers could incorrectly use create or link vendors actions as line actions from the **Purchase Requisition Template** or add or remove them from the Vendors FactBox.

The Department Manager's Finance Requests list pages and FactBoxes were updated to ensure that drilldowns are only available when it is meaningful for the Department Manager to view the supporting data.

Department Manager users were able to add attachments and incoming documents to **Posted Purchase Invoices** and **Credit Memos** but should only have read access to these documents.

The **Cancel** action now works for Department Managers on an *Open Payment Request*.

Project and Grant Accounting

Implemented the Item Attributes FactBox on the **Project** card.

Cash Management

On charitable receipts, address fields and other values were not showing up correctly or in the correct places.

HR Management

Absence & Leave Management

Absence Requests

Using **Change Sign** on a mySparkrock **Absence Request** would incorrectly show 'Partial Day' beside Quantity.

Absence Sequencing and Top Ups

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.

Credit based top ups with Absence Sequencing were improved to handle complex scenarios in the compensation journal. When there are not credits available, the Top Up credit is neither shown nor used.

Problems with Top Ups and hourly assignments, as well as an issue with the reported unit of measure, were resolved.

Absence Approvals

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

The mySparkrock absence approvals email notification has been corrected to display the correct *Created By* name. The rejection message has been corrected to indicate who rejected the request. A situation where approval emails were not sent to mySparkrock users was corrected.

Email messages are no longer created when an absence request is denied in mySparkrock. An email message is generated from the core product on processing an approval or denial, which contains a link that can be used to review the absence request.

Absence Processing

An error in calculation of prorated first year entitlements was corrected. The calculation now considers employee start date to the end of the current year.

When processing an absence request using a leave without pay cause of absence, the Load Lines action in the Compensation Journal will reduce the employee salary amount by the amount of hours times the hourly rate.

Problems with predicting future entitlements on the per pay entitlement worksheet to validate a future dated absence request were resolved.

When a change is made to an Attendance Plan with no active Employees, removed the unnecessary prompt to update employees within the plan.

The obsolete field *Use Current Year Entitlement* was removed from the **Attendance Plan** and **Employee Attendance Plan** pages and marked as obsolete on the supporting tables.

A problem with the supporting calculation for number of consecutive days absent in Payroll event 008 was corrected.

Causes of Absence with **Use for Top Up Only** set to *true* cannot be selected when creating an absence request.

In the **Absence Request** daily quantity breakdown, if there is a change in assignment FTE mid request, the correct Hours/Day are applied for each day.

On mySparkrock Absence Requests, the quantity is updated when the date of the request is changed.

Employee Management

HR Requests

When an **HR Request** for a **DETAILS CHANGE** which creates a new assignment has the 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.

An HR Request with HR Reason Code **DETAILS CHANGE** can no longer be used to change a leave assignment. HR Reason Code **LEAVE CHANGE** must be used for these assignments.

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.)

An HR Request to hire an employee with a space in the first or last name now processes fully and creates an email address with the spaces omitted.

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.

Processing

Corrected the Mass Create HR Employee Tasks task to respect the *Copy Confidential Details* setting on **HR Task Types**. This ensures the system will copy the Confidential information to a new task when the setting is on.

When using the HR Employee Assignment Worksheet to upload data, the Leave HR Pay Code is populated.

When using the **EOY Carry Forward Worksheet**, the **Load Lines** function will skip Employees where **Privacy Blocked** is TRUE.

When using the **Progression Worksheet**, the **Load Lines** function could report that "You cannot base a date calculation on an undefined date"

The Budget FTE drill-down in the **HR Position** Factbox now correctly brings up Employee Assignments of Entry Type Budget.

Benefit Management

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

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

When using **Process, Calculate** on the OTPP Worksheet, error reporting was improved to aid in discovering and correcting data errors.

When using **Create File** on the OMERS worksheet, the validate operation is run before the file is created, so that any errors can be reviewed.

Collective Agreement Management

The number of members employed column on the **Unions** list now correctly includes all active members.

Payroll Administration

Salary Deferrals

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

For an employee with multiple assignments (with different HR Position Classes) where Salary Deferrals are enabled, the paycheck stub could include multiple Salary Deferral sections, instead of consolidating them in one.

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.

Compensation Journal

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.

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.

Import

When you import data into the **HR Employee Assignment** worksheet using the **Import** method provided in the worksheet and you advised the PayGrid / Pay Grade / Pay Step, the amount associated with that pay grid was not populated.

Problems with error processing on the ONE-T Payroll Deduction Import were corrected, and a drill-down issue on Employee was resolved.

Scheduling and 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.

Unit code and description were added to the Schedule Unit Employees list page to support the case when this page is opened as a drill down from the HR Employee Card's Scheduling FastTab via No. of Scheduling Units.

Time Entry

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

Problems with access to the Time Sheet Entry page for some users were corrected.

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

Problems and errors when using the **Approve** or **Deny** actions on the mySparkrock Timesheet approvals page were corrected. The email denial message has been corrected to indicate who denied the time sheet.

An error in internal tracking for auto-approved lines could result in an incorrect Hours value on the Time Entry Approval Entries.

On **Time Sheet Entry**, under **Request Approval**, the **Entire Unit** action is now available.

Removed the obsolete **Email Notification** FastTab from **Time Entry Setup**.

Corrected an issue with subordinate Time Entry where an employee with no subordinates could appear as a subordinate of themselves.

On mySparkrock **Timesheet** entry, Maximum and Minimum hours are tested when submitting time entry lines. If the thresholds are violated, a warning or error dialog appears with details. If the checks are configured as warnings, then the time entry lines are still submitted, but the user can then cancel them and correct them as needed.

Known Issues

Platform

In some situations, after upgrading to the Spring 2020 release, users can no longer access the **Edit in Excel** and/or **Open in Excel** actions. This is a Microsoft platform problem and Sparkrock is tracking progress on this issue.

As a workaround, administrators can manually add the **“D365 Excel Export Action” Permission Set** to the relevant permission sets and/or user groups, or manually add the system permission **6110** “Allow Action Export to Excel” to relevant permission sets.

In some Sparkrock 365 Role Centers, the user cannot drill down on charts. The same information is typically available from cues and/or pages.

Finance and Procurement

The **FA Posting Group** card is unresponsive when opened and cannot be used to set the account values. This is a known problem in the platform. As a workaround, you can enter the values directly on the **FA Posting Groups** list page.

In mySparkrock, if you attempt to add a specific attachment to an **Expense Claim** more than once (attach the same file name again), an error is reported, but the attachments section of that specific claim becomes inoperable. Attachments on this Expense Claim cannot be displayed or deleted. As a work-around, the Expense Claim can be opened on the core product web client, where all attachments will be visible and can be opened or downloaded. (Sparkrock work item 12467)

For the Department Manager under Requests to Approve, Expense Claims will display a blank Sender field when the requester is a mySparkrock-only user. (Sparkrock work item 12592)

Appendices

Apps available on Sparkrock 365

Canadian installations

US installations

Sparkrock Feature Comparison Charts

Platform

Finance and Procurement

HR Management

Payroll Administration

Schedule and Time Entry

Apps available on Sparkrock 365

Canadian installations

App Name	Publisher	App Description
Installed by default		
Application	Sparkrock	Application (CA)
Base Application	Microsoft	Base Application (CA)
Core Application	Sparkrock	Core Application (CA)
English language (Canada)	Microsoft	This application adds the English language (Canada) to Dynamics 365 Business Central
Finance and Procurement Platform	Sparkrock	
Primo Payday	Primo Payday	Increase efficiency and financial analytics with this fully integrated payroll solution. Post payroll directly to your GL and easily leverage the payroll accounting detail for financial analysis.
Primo Payday Connector	Sparkrock	
Scheduling	Sparkrock	
Send remittance advice by email	Microsoft	Allows to send remittance advice to vendors by email
Send To Email Printer	Microsoft	Provides functionality to use the printer's email address to send print jobs to the printer.
System Application	Microsoft	Provides a standard set of capabilities that serve as a foundation for developing business apps.
Time Entry	Sparkrock	
Workforce (HR Management)	Sparkrock	
Available to install		
AMC Banking 365 Fundamentals	Microsoft	AMC Banking 365 Fundamentals for Microsoft Dynamics 365 Business Central
Business Central Cloud Migration - Previous Release	Microsoft	Enables data migration from the previous version of Dynamics BC (n-1) to the current release of Dynamics 365 Business Central SaaS.
Business Central Cloud Migration - Previous Release (CA)	Microsoft	Enables data migration from the previous version of Dynamics BC (n-1) to the current release of Dynamics 365 Business Central SaaS.
Business Central Intelligent Cloud	Microsoft	This extension will take you through the process to configure your Cloud Migration environment.
Ceridian Payroll	Microsoft	The Ceridian Payroll functionality allows you to import payroll transactions from Ceridian HR/Payroll (US) and Ceridian Powerpay (Canada).
DIOT - Localization for Mexico	Microsoft	Easily configure and create DIOT file.
Dynamics GP History SmartLists	Microsoft	This extension will allow you to query your Dynamics GP history data with your Dynamics 365 Business Central cloud tenant.
Dynamics GP Intelligent Cloud	Microsoft	This extension will allow you to set up data migration from your Dynamics GP companies to your Dynamics 365 Business Central tenant through a wizard.
Investnet Yodlee Bank Feeds	Microsoft	Investnet Yodlee Bank Feeds enables you to process payments and reconcile bank accounts faster and safer.
Essential Business Headlines	Microsoft	Essential business headlines draw facts out of your data. Your people draw the conclusions.
French language (Canada)	Microsoft	This application adds the French language (Canada) to Dynamics 365 Business Central
Image Analyzer	Microsoft	Analyze images using Microsoft Cognitive Services.
Intelligent Cloud Base	Microsoft	This extension will take you through the process to configure your Cloud Migration environment.
Late Payment Prediction	Microsoft	Predict whether payments for sales will be on-time.
Microsoft Pay Payments	Microsoft	The Microsoft Pay Payments service adds a Microsoft Pay Payments link to your sales documents so customers can easily pay using Microsoft Pay Payments. From inside Dynamics 365 Business Central you can send the documents by email.
PayPal Payments Standard	Microsoft	PayPal Payments Standard adds a PayPal link to your sales documents so customers can easily pay using PayPal. From inside Dynamics 365 Business Central; you can send the documents by email.
QuickBooks Data Migration	Microsoft	Enables users to migrate their Customers, Vendors, Items and Accounts and open transactions from QuickBooks to Microsoft Dynamics 365 Business Central.
Quickbooks Payroll File Import	Microsoft	The Quickbooks Payroll File Import functionality allows you to import payroll transactions from a Quickbooks IIF file.
Sales and Inventory Forecast	Microsoft	Get insights about potential sales and a clear overview of expected stock-outs.

Apps available on Sparkrock 365

U.S. installations

App Name	Publisher	App Description
Installed by default		
Application	Sparkrock	Application (US)
Base Application	Microsoft	Base Application (US)
Core Application	Sparkrock	Core Application (US)
English language (United States)	Microsoft	This application adds the English language (United States) to Dynamics 365 Business Central
Finance and Procurement Platform	Sparkrock	
Primo Payday	Primo Payday	Increase efficiency and financial analytics with this fully integrated payroll solution. Post payroll directly to your GL and easily leverage the payroll accounting detail for financial analysis.
Primo Payday Connector	Sparkrock	
Scheduling	Sparkrock	
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Time Entry	Sparkrock	
Workforce (HR Management)	Sparkrock	
Available to install		
AMC Banking 365 Fundamentals	Microsoft	AMC Banking 365 Fundamentals for Microsoft Dynamics 365 Business Central
Business Central Cloud Migration - Previous Release	Microsoft	Enables data migration from the previous version of Dynamics BC (n-1) to the current release of Dynamics 365 Business Central SaaS.
Business Central Cloud Migration - Previous Release (US)	Microsoft	Enables data migration from the previous version of Dynamics BC (n-1) to the current release of Dynamics 365 Business Central SaaS.
Business Central Intelligent Cloud	Microsoft	This extension will take you through the process to configure your Cloud Migration environment.
Ceridian Payroll	Microsoft	The Ceridian Payroll functionality allows you to import payroll transactions from Ceridian HR/Payroll (US) and Ceridian Powerpay (Canada).
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Sparkrock Feature Comparison Charts

Platform Improvements

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
mySparkrock Platform Management	Sparkrock 2016	Sparkrock 365
User Management	✓	✓
Microsoft SharePoint	✓	Discontinued
Basic (Form Based) Authentication	✓	Discontinued
Azure AD	✓	✓
Windows ID	✓	Discontinued
OAuth (Google Gmail API)— Sparkrock Cloud Only	X	✓
Sparkrock 365 Platform	Sparkrock 2016	Sparkrock 365
Application Area Management	X	✓
Multi-Language Support	Sparkrock 2016	Sparkrock 365
French Language Support (Core Product)	✓	Planned
French Language Support (mySparkrock)	✓	Planned
Microsoft Functionality	Sparkrock 2016	Sparkrock 365
Usability	✓	✓
Power BI	X	Planned
Outlook Integration	X	✓
Predictive Automation and AI	X	Planned
Security	✓	✓
Excel Integration	✓	✓
Personalized Views and Designs	✓	✓
Saved Filter Views	X	✓
User Tasks	X	✓
Web Client (Cloud)	✓	✓

Finance and Procurement

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
Accounting Manager	✓	✓
Purchasing Agent	✓	✓
Accounts Payable Coordinator	✓	✓
Account Receivable Administrator	✓	✓
Department Manager	✓	✓
Security Administrator	✓	✓
Accounts Payable		
	Sparkrock 2016	Sparkrock 365
A/P Batches	✓	✓
Fixed Asset No.	✓	✓
Get PO Lines	✓	✓
Vendors	✓	✓
Purchase Invoicing	✓	✓
Tax Rounding	✓	✓
Payment Journals	✓	✓
Electronic File Transfer (EFT)	✓	✓
Printing Checks	✓	✓
Vendor T4As	✓	✓
Misc. Vendors	✓	✓
Get Receipt Lines (4 options)	✓	✓
Vendor Certifications	✓	✓
Accounts Receivable		
	Sparkrock 2016	Sparkrock 365
Customers	✓	✓
Sales Invoicing	✓	✓
Word Layout	✓	✓
Customer Statement	✓	✓
Emailing	✓	✓

Asset Management	Sparkrock 2016	Sparkrock 365
Fixed Assets	✓	✓
Depreciation Calculations	✓	✓
Budget Management	Sparkrock 2016	Sparkrock 365
Budget Structure and Creation	✓	✓
Budget Journals	✓	✓
Budget Journals Attachments	✓	✓
Budget Journals Workflows	✓	✓
Budget Checking (Purchase Documents)	X	✓
Budget Journal Imports	✓	✓
Over-budget Approvals (Finance Requests)	✓	✓ NEW
Cash Management	Sparkrock 2016	Sparkrock 365
Deposits	✓	✓
Cash Receipting (Sparkrock Functionality)	✓	✓
Deposit Tax Receipting	✓	✓
Bank Reconciliation	✓	✓
Import Bank Statement	✓	✓
Import Cleared Checks	✓	✓
Donor Management	Sparkrock 2016	Sparkrock 365
Donor Management	✓	Discontinued
Expense Claims	Sparkrock 2016	Sparkrock 365
Expense Claims Entry (mySparkrock)	✓	✓ NEW
Finance Approval (mySparkrock)	✓	X
Finance Approval (Core Product)	X	✓ NEW
Expense Claims Processing to Accounts Payable	✓	✓ NEW

Financial Analysis	Sparkrock 2016	Sparkrock 365
Data Sets	✓	✓
Attach Data Sets to mySparkrock User Profile	X	✓
Financial Analysis (mySparkrock)	✓	X
Financial Analysis (Core Product)	X	Planned
General Ledger	Sparkrock 2016	Sparkrock 365
Chart of Accounts and Dimensions	✓	✓
Dimension Validation	✓	✓
Reporting Dimensions	✓	Discontinued
Workflows	✓	✓
General Journal	✓	✓
Recurring General Journal	✓	✓
Fund Accounting	✓	✓
Standard Reporting	✓	✓
Inventory Management	Sparkrock 2016	Sparkrock 365
Items	✓	✓
K12 Reporting Package	Sparkrock 2016	Sparkrock 365
K12 Reporting Package (Finance)	✓	Planned
Payment Requests	Sparkrock 2016	Sparkrock 365
Payment Request Entry (mySparkrock)	✓	X
Payment Request Entry (Core Product)	X	✓
Finance Approval (mySparkrock)	✓	X
Finance Approval (Core Product)	X	✓
Payment Requests Processing to Accounts Payable	✓	✓

Project and Grant Accounting	Sparkrock 2016	Sparkrock 365
Project and Grant Accounting	✓	✓
Purchasing	Sparkrock 2016	Sparkrock 365
Budget Commitments	✓	✓
Charts	X	✓
Commitments and Dates Update Reports	✓	✓
Number Series Setup	✓	✓
Purchaser Code Filter	✓	✓
Purchase Orders	✓	✓
Purchase Requisitions	✓	✓
Print Layouts (Word and RDLC)	✓	✓
Order Address list page	✓	✓
Emailing	✓	✓
Receiving (Back Office)	✓	✓
Requisition Management	Sparkrock 2016	Sparkrock 365
Application Area Management	X	✓
Delegates	✓	✓
Department Manager Role Center	X	✓
Requisition Setup Expense Types	✓	✓
Requisition Entry (mySparkrock)	✓	X
Requisition Entry (Core Product)	X	✓
Finance Approval (mySparkrock)	✓	X
Finance Approval (Core Product)	X	✓
Requisitions Processing to Purchase Orders	✓	✓
Requisitions Processing to Quotes	✓	Planned
Email Reminders	✓	Planned
Requisition History	✓	Planned
Requisition Date Tracking	X	✓
Templates	✓	✓
Online Receipts	✓	✓

Budget Checking Visibility Options	✓	Planned
Open Related Documents from Budget Checking Details	✓	Planned
Dimension Cascading from list of Account Sets	✓	Discontinued
View Purchase Orders (mySparkrock)	✓	X
View Purchase Orders (Core Product)	X	✓
Online Receiving (mySparkrock)	✓	X
Purchase Receiving (Core Product)	X	✓
View Purchase Invoices (mySparkrock)	✓	X
View Purchase Invoices (Core Product)	X	✓
Upgrade Toolkit (Sparkrock 2016 to Sparkrock 365)	Sparkrock 2016	Sparkrock 365
Upgrade Toolkit	X	✓

HR Management

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
Human Resources Manager	✓	✓
Absence Management		
Attendance Plans	✓	✓
Absence Requests	✓	✓
Approval Workflow	✓	✓
Attendance Confirmation	✓	Planned
Cause of Absence	✓	✓
Cause of Inactivity	✓	✓
Leave Types	✓	✓
Leave Accrual Forecasting	✓	✓
Absence Units	✓	✓
SmartFindExpress	✓	✓
Time Off in Lieu/Banked Time/Comp Time	X	✓
Applicant Tracking		
Applicant Tracking, Job Requisitions, Applicants	✓	✓
Integration with Microsoft Dynamics 365 Sparkrock ATS	✓	Planned
Integration with Microsoft Dynamics 365 Talent Recruit	X	Planned
Appraisal Management		
Appraisal Plans	✓	✓
Benefit Management		
Employee Benefits	✓	✓
Benefit Groups	X	✓
Benefit Plans	✓	✓

Collective Agreement Management	Sparkrock 2016	Sparkrock 365
Collective Agreements	✓	✓
Grievances	✓	✓
Harassment Complaints	✓	✓
Unions	✓	✓
Internal Resolution Methods	✓	✓
External Resolution Methods	✓	✓
Employee and Manager Self-Service	Sparkrock 2016	Sparkrock 365
Attendance & Requests (mySparkrock)	✓	✓
Attendance Approval (mySparkrock)	✓	✓
Absence Confirmation Manager (mySparkrock)	✓	Planned
Absence Confirmation Employee (mySparkrock)	✓	Planned
Administration (mySparkrock)	✓	X
Appraisals (mySparkrock)	✓	✓
HR Requests (mySparkrock)	✓	Planned
HR Request Approvals (mySparkrock)	✓	Planned
Pay Statements (mySparkrock)	✓	✓
Tax Forms (mySparkrock)	✓	✓
My Team (mySparkrock)	✓	✓
Profile (mySparkrock)	✓	✓
Tasks (mySparkrock)	✓	✓
Timesheet (mySparkrock)	✓	✓
Timesheet Admin (mySparkrock)	✓	✓
Timesheet Admin Monthly (mySparkrock)	✓	✓
Training & Registration (mySparkrock)	✓	✓
Manager Self-Service (mySparkrock)	✓	Partial
Reminders (mySparkrock)	✓	✓

Employee Management	Sparkrock 2016	Sparkrock 365
Qualifications	✓	✓
Confidential Information	✓	✓
HR Tasks	✓	✓
HR Budget General	✓	✓
Employee Classes	✓	✓
Employee Contracts	✓	X
HR Management Integrations	Sparkrock 2016	Sparkrock 365
HRIS Exports	✓	✓
OTIP/ONE-T Payroll Imports	✓	✓
OnSIS	X	✓
Parklane	✓	✓
OMERS	✓	✓
Ontario College of Teachers (OCT)	✓	✓
Teachers Pension Plan (TPP)	✓	✓
MVAL	X	✓
SmartFindExpress	✓	✓
OECTA	✓	Planned
AESOP	✓	Planned
Teachers Retirement Allowances Fund (TRAF)	✓	Planned
Prof. Association Details	✓	Planned
K12 Reporting Package	Sparkrock 2016	Sparkrock 365
K12 Reporting Package (Workforce)	✓	Planned

Position Management	Sparkrock 2016	Sparkrock 365
HR Reason Codes	✓	✓
HR Requests	✓	✓
HR Requests Approval	X	✓
Employee Experience Ledger	X	✓
HR Position Classes (HR Jobs)	✓	✓
HR Position FactBox	✓	✓
HR Position Rank	✓	✓
HR Job Criteria	✓	X
HR Categories	✓	✓
HR Departments	✓	✓
HR Agents	✓	✓
HR Reasons	✓	✓
HR Calendars	✓	✓
HR Task Types	✓	✓
HR Companies (Employer)	✓	✓
Assignment Reason Codes	✓	✓
Assignment Types	✓	✓
Seniority Groups	✓	✓
Seniority Types	X	✓
Member Plans	✓	✓
Location Classes	✓	✓
Salary Deferrals	X	✓
Retro Pay	✓	✓
Salary Calculator	X	✓

Training Management	Sparkrock 2016	Sparkrock 365
Trainings	✓	✓
Training and Registration (mySparkrock)	✓	✓
Upgrade Toolkit (Sparkrock 2016 to Sparkrock 365)	Sparkrock 2016	Sparkrock 365
Upgrade Toolkit	N/A	Planned

Payroll Administration

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
HR Payroll Admin	X	✓
Payroll Administrator	✓	X
Payroll Administration	Sparkrock 2016	Sparkrock 365
Posted Payroll Processing	✓	✓
New Payroll Procedure Operations	X	✓
Payroll Ledger Entries	✓	✓
Payroll Processing	✓	✓
Batch Payroll Processing	✓	✓
Compensation Journal	X	✓
Payroll Entry HR Requests (mySparkrock)	✓	✓
Retroactive Pay	✓	✓
Salary Deferral System	X	✓
PGP Encryption	X	✓
mySparkrock Platform Management	Sparkrock 2016	Sparkrock 365
APIs	✓	✓

Scheduling and Time Entry

Feature / Functional Area	Sparkrock 2016	Sparkrock 365
Role Centers		
Scheduling & Training Administrator	✓	X
Schedule Administrator	X	✓
Employee Scheduling		
Approval Workflow	✓	✓
Casual Employees	X	✓
Confidential Information	X	✓
Employee Scheduling Setup	✓	✓
HR Integration to Schedule Unit Employees	✓	✓
HR Pay Codes	✓	✓
Schedule Templates	✓	✓
Schedules	✓	✓
Max Warning Exclude Pay Group	✓	✓
Multi-Activity Shifts	✓	✓
Offers (mySparkrock)	✓	✓
Override Hourly Rate	X	✓
Bids (mySparkrock)	✓	✓
Requests for Absence (mySparkrock)	✓	✓
Confirmation and Approval Reminders	✓	✓
Unit Schedule (mySparkrock)	✓	✓
My Schedule (mySparkrock)	✓	✓
Shift Trading (mySparkrock)	✓	✓ NEW
Confirm Shifts Worked (mySparkrock)	✓	✓
Priority by Seniority Hours	✓	✓
Approve Shifts Worked (mySparkrock)	✓	✓
Integration to Absence Management	✓	Planned
Integration to Training Management	✓	Planned
Integration to Payroll	✓	✓ NEW

mySparkrock Platform Management	Sparkrock 2016	Sparkrock 365
APIs	✓	✓
Time Clock	Sparkrock 2016	Sparkrock 365
Biometric integration to 3 rd party providers	✓	Planned
Time Clock (mySparkrock)	✓	Planned
Web Clock In/Out (mySparkrock)	✓	Planned
Time Entry	Sparkrock 2016	Sparkrock 365
Timesheet Setup (excluding approval)	✓	✓
Timesheet Approvals Setup	✓	✓
Timesheet Integration to Payroll	✓	✓
Timesheet Entry (Employee & Admin)	✓	✓
Timesheet Approvals	✓	✓
Timesheet (mySparkrock)	✓	✓
Timesheet Admin (mySparkrock)	✓	✓
Timesheet Approvals (mySparkrock)	✓	✓
Time Entry (Version 1)	✓	Discontinued