School Accounting System Release Notes

For Future Update to be posted first part of August 2019

Main>Maintenance

NEW A Password Policy option has been added to the System File. A supervisor now has the ability to set the complexity for user passwords. They can select the password minimum length, and whether the user's password will require upper/lowercase letters, special characters, or numbers. The designated policy will be in affect once this screen is changed and saved, and applies to all School Accounting System and Web Link users. When a new user is added, the password will continue to be the same as their user ID, but they'll be prompted to change it to match the policy on their first login. This is also the case when using the Add Employees as Web Link Users feature. The password will continue to default to the last 4 digits of the employee's social security number, but they'll be prompted to change it on their first login.

NEW On the Web Link tab in the Email Manager option, the following reserved words have been added and can be used in all message fields in the Leave Request Options section: SUBSTITUTE, LEAVEDESCRIPTION, UNITOFTRACKING, LEAVEUNITSTOUSE, COMMENTS, STARTTIME, ENDTIME, and ALLDAY.

Main>Utilities

NEW Several changes/enhancements have been made to the Web Link Setup Options:

- Instead of locking out users based on their IP address, the system will now track attempts by the specific user ID.
- The Payroll tab has been renamed to Payroll and Compensation.
- A new tab has been added for Employee Personal Information which is used to define the categories of data that employees can view and change from within the Web Link module. The categories include contact information, dependents, direct deposit, emergency contacts, and medical information. Email notifications can also be set up to inform payroll or human resources personnel of employee changes.
- The Document Management tab has been updated to include a field for Allow Employee Subfolder Access. When selected, Web Link users can be set up for access to view their employee file documents within the designated subfolders in the SUI_PR_Employees application within K12Docs.

Main>User Controls

NEW Several new options have been added to User Security:

- Two new options have been added to Web Link User Permissions: View File Documents and View/Edit Personal Information. The View File Documents option, which only appears for districts who have licensed the K12Docs module, allows the employee tied to the specific user to view employee documents from K12Docs for the subfolders designated in the Web Link Setup options. The View/Edit Personal Information option allows the employee tied to the specific user to view and edit (if applicable) certain categories of employee data (as defined in the Web Link Setup Options). Also, Check History has been renamed to Check History/Reimbursements since it now includes reimbursement checks from accounts payable and payee checks from payroll.
- Process Employee Personal Changes has been added to Form Description Employees under Payroll and to Employees under Human Resources. These options will only appear if the district has licensed the Web Link module and allows a user access to the Process Employee Personal Changes feature.
- The Add Employees as Web Link Users and View/Adjust Users have been updated to include the above changes.

General Ledger>Government Reporting

Nebraska: Nebraska customers will now have three options for generating the annual report. The Nebraska Annual Report – New Format will be used by school districts starting with fiscal year 2018-2019 and by Educational Service Units (ESUs) starting with fiscal year 2019-2020 to create the file to upload to the state for the annual report. The Nebraska Annual Report – Old Format will be used by ESUs to generate the annual report through fiscal year 2018-2019. The Nebraska Annual Report – Test Upload option is used by districts and ESUs to create a test file to upload to the state to verify account numbers prior to submitting the annual report.

Wyoming: The Project Number fields have been updated with a new list from the Wyoming Department of Education for the Annual Report. Also, a new column for VIN has been added to the Edit tab and will be placed in the appropriate column when creating the upload file. VIN is required for expenditure accounts with function code 3510 and 3520 with either object code 550 and 551.

Accounts Payable>Data Entry
NEW A URL field has been added to the Detail Information section in Purchase Orders along with a Go To button to launch the Internet browser and display the specific website. The Import Purchase Orders option also includes this new field.

The URL field has been added to the Purchase Order Detail Information section in Receiving along with a Go To button to launch the Internet browser and display the specific website.

Accounts Payable>Requisitions
NEW A URL field has been added to the Detail Information section and on the Bids screen in Requisition Entry and Requisition Approvals. The Go To button will launch the Internet browser and display the specific website. The users will have access to the fields based on the approval tree defaults or override rights from the Requisition Options screen. The Import Requisitions option also includes these new fields.

NEW A new field for Disable Requisition Number in Data Entry has been added to the Requisition Options screen. If selected, the Requisition Number field will be disabled (gray) and the requisition number will automatically be assigned once the requisition is saved in Requisition Entry.

In the Requisition Inquiry option, URL has been added to the Requisition Detail and Purchase Order Detail sections. Bid URL has been added to the Requisition Detail section. The Go To button will launch the Internet browser and display the specific website. Also, Employee Name has been added to the Find (Ctrl+F) search.

The Requisition Status screen has been updated to include a new column for Employee ID.

Accounts Payable>Maintenance
NEW For schools using a third-party check writing software, a new field for Check Format for Viewing has been added to the Check Writing Software screen (located under the Options menu in Check Setup – Vendors). To utilize it, a new Check Setup – Vendors format will need to be added in Accounts Payable. Once created, the format will be linked to your Check Writing Software report by entering the check format name in the Check Format for Viewing field. This will allow users to view copies of checks in Requisition Inquiry, Vendor Inquiry, and Purchase Order Inquiry by selecting the To Screen button. Also, employees will be able to view their accounts payable checks in Web Link under the Check History/Reimbursements options.

Accounts Payable>Options
In the Vendor Inquiry and Purchase Order Inquiry options, URL has been added to the Requisition Detail and Purchase Order Detail sections. Bid URL has been added to the Requisition Detail section. The Go To button will launch the Internet browser and display the specific website.

Accounts Payable>Reports
Purchase Order Listing – Detail: This report has been updated to include an optional field for URL.

Receiving Report – Detail: This report has been updated to include an optional field for URL.

Requisition Listing – Detail: This report has been updated to include an optional field for URL.

Requisition Inquiry: This report has been updated to include an optional field for URL.

Payroll>Data Entry
NEW The Go To button has been added next to the Leave Balance and Main Leave Balance fields in Pay Period Entries, Employee Absences, and Time Cards. When selected, it will open the Leaves tab for the designated employee.

The Select Leave Requests/Substitutes for Processing option, located under the Leave Request menu in Pay Period Entries and Employee Absences, has been updated to include new fields for employee pay group ID, substitute pay group ID, and substitute pay code ID.

Payroll>Maintenance
NEW An exciting new feature has been added to the Employee File for those districts who have the Web Link module. With this release, employees will have the option to view their contact information, dependents, direct deposit information, emergency contacts, and medical information and if given the ability they'll also be able to change their information. Then the payroll and/or human resources staff will see the changes in the Employee File which will either be updated automatically or changes can be set to require review before processing. Refer to the Process Employee Personal Changes topic in the Help File.

- Process Employee Personal Changes has been added to the Options menu. If employees are able to make changes to their personal information from within Web Link, this option is used to view and process those changes that require review. The changes can be updated (copied) to the Employee File or ignored. An alert will also appear on the Payroll or Human Resources screen under the Alerts section for users with rights to review the changes.
- A new Employee Personal Changes button has been added. When viewing an employee's file, the button will appear on the tabs with changes requiring review and will be green. When viewing a specific tab, the button will also appear in the button bar. A green button indicates there are changes waiting to be processed for the employee for that tab, and when selected the Employee Personal Changes screen will appear showing the changes the employee submitted via Web Link and can be processed accordingly. If the button is black, then previous changes have been completed for this employee tab and those changes can be viewed by selecting the button. If the tab has never had employee personal changes submitted via Web Link, the button will appear gray.

The Comments field on the Name & Address tab in the Employee File has been increased to allow up to 8000 characters.

The Leave Request Comments have been added as a column in the Leave Detail on the Leaves tab in the Employee File.

In the Leaves File, a new field for Prohibit Entry if Negative Balance has been added. When selected, users entering leave requests will not be able to save entries with negative balances.

NEW For schools using a third-party check writing software, a new field for Payee Check Format for Viewing has been added to the Check Writing Software screen (located under the Options menu in Check Setup – Vendors). To utilize it, a new Check Setup – Payees format will need to be added in Payroll. Once created, the format will be linked to your Check Writing Software report by entering the check format name in the Payee Check Format for Viewing. This will allow users to view copies of checks in the Employee/Payee Inquiry by selecting the To Screen button. Also, employees will be able to view their payee checks in Web Link under the Check History/Reimbursements options.

Payroll>Options
NEW Several enhancements have been made to the Leave Request options:

- A new field for Number of Years of Leave Entries to Display in the Calendar has been added to Leave Request Options. Use this field to enter in the number of past years of leave request entries to show on the calendar that displays within the various leave request options or leave the field blank to show all years.
- Two new checkboxes (Approve and Reject) have been added to the Leave Request Approvals screen allowing users to approve or reject multiple leave requests at a time without viewing the details and/or making changes. A Has Warnings checkmark will appear if the leave request should be processed individually via the Edit Record button. Refer to the Approving Leave Requests topic in the Help File.
- Pay Code ID has been added to the Substitutes List on the Edit Leave Request Substitutes, Leave Request Approvals, and Leave Request Inquiry. If editing a substitute entry, a pay code from the pay code file can be assigned to the substitute.
- On the Edit Leave Request Substitutes screen, the pending entries will sort in ascending order based on the number of assigned substitutes and then by start date. Also, the Pay Group ID has been added as a column after the Employee Name field.
- To print the calendar that displays on the various leave request options, a Print Calendar button has been added.
- When entering or approving leave requests, if there is already an entry for the employee with a matching Leave ID and start date, the system will display a warning message.
- Users will not be able to enter leave request entries that take their balance negative if the Prohibit Entry if Negative Balance field has been selected in the Leave Request Options.
- A Recall Submitted Leave option has been added to Leave Request Entry and Leave Request Entry - FMLA. This feature will allow a user to recall a submitted leave. Once complete, the leave can be changed and then resubmitted or deleted. Refer to the Recalling a Leave Request After Submitting topic in the Help File. Leave requests can still be recalled from the Leave Request Inquiry screen.
- A new option for Manage Calendar has been added. This feature allows users to add, edit or delete events on the calendar that displays within the various leave request options. For example, holiday or days an organization is closed can be entered and displayed for users. Refer to the Manage Calendar topic in the Help File.
- An Employee Group option has been added to the View Leave Request Calendar. Use this feature to select which employee groups will appear in the calendar. All groups are selected by default.

Payroll>Government Reporting
Iowa: There are no changes to the Iowa BEDS Report for this year.

Payroll>Reports
Employee Absence Report and Employee Absence Report with Balances: These two reports have been updated to include an optional field for Leave Request Comments.

Fixed Asset Inventory>Options
The Purge Disposed Assets option has been updated to only purge assets that have been disposed for at least 5 years prior.

Report Writer
New Report Categories have been added for each modules main search. The <module> Main Report Search category will need to be selected on the Categories/Screens option to have a report display in a module under the Reports menu in the Report Search or Report Writer – Custom options.