Web Link Release Notes

For Future Update to be posted first part of August 2019

Main

NEW Districts can now set a password policy for users. Depending on the settings chosen (minimum length and upper/lowercase letters, special characters, and/or numbers) a user may be prompted to change their password to match the new policy.

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. Also, a Copy Purchase Order button has been added, allowing a user to copy a previously entered purchase order into a current purchase order batch.

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.

NEW In the Requisitions Awaiting Approval/Rejection List, two new checkboxes (Approve and Reject) have been added to allow users to approve or reject multiple requisitions at a time without viewing the details and/or making changes. A Has Negative Budget Balances checkmark will appear if the requisition has a detail line item with a negative budget balance. The Edit button can be used to view the details of a requisition and individually approve or reject it. Also, a filter row has been added, allowing a user to filter for only certain items to approve or reject.

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.

NEW If the Disable Requisition Number in Data Entry field is selected on the Requisition Options screen, then the Requisition Number field will be disabled (gray) and the requisition number will automatically be assigned once the requisition is saved in Requisition Entry.

Employee ID has been added as a column on the Requisition Status screen.

Employee Information

NEW The options under this menu have been reorganized. There are now three categories: Leaves, Payroll and Compensation, and Personal Information. The Leaves category contains all the leave request options along with the option to view leave balances. Check History/Reimbursement, W2s and 1095s are the options located under the Payroll and Compensation category. The Personal Information category has the options for contact information, direct deposit, dependent, emergency contacts, and medical information.

NEW An exciting new feature, Personal Information, gives employees access 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 in the School Accounting System which will either be updated automatically or changes can be set to require review before processing.

NEW The View File Documents option allows employees to view their employee documents that were scanned and saved in K12Docs for those organizations that have licensed this program. Only the documents in the selected subfolders within the SUI_PR_Employees application in K12Docs (as designated within the Web Link Setup Options) can be viewed using this option.

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

- The calendar that displays within various leave request options can be limited in the number of years of leave requests to display. A Download PDF Calendar button has been added. When selected the current calendar view will be downloaded in PDF format. Also, the calendars can now display various organization events setup using the Manage Calendar feature in the School Accounting System.
- 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 and the Process button will process the selected entries. A Has Warnings checkmark will appear if the leave request should be processed individually via the Edit link. Also, a Sort By field has been added for the user to select to sort by either Employee ID or Start Date.
- 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.
- 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.
- 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.
- Users will not be able to enter leave requests 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. Leave requests can still be recalled from the Leave Request Inquiry screen.
- 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.

When viewing the detail for a specific leave in Leave Balances, a new column, Leave Request Comments, has been added and will display any comments for the leave request entry.

NEW The Check History option has been renamed to Check History/Reimbursements and now includes checks and direct deposit stubs for Individual Bank Account Deduction information from Payroll and payments (such as reimbursements) from Accounts Payable.

Reports

NEW Several enhancements have been made to the Report Printing Options screen in Reports:

- The Execute Report button has been renamed to Generate to PDF. A new Download to Excel button has been added and when selected the report will be generated and exported to a Microsoft Excel spreadsheet file (.XLSX).
- The Report Selection, Variable Fields, and Report Parameters will default in based on the criteria used when the report was designed.
- If a report was designed with optional fields, those fields can now be selected and included when generating the report. The Optional Fields section is located on the bottom of the screen.
- If the [vprEmployeePersonnelReference].[NoCustomReferencedID] field appears (applicable for only certain Payroll and Human Resources reports), the user can click the search button and select the desired referenced custom field on which to sort the information included on the report.