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# Release Notes for Infinite Visions Enterprise Edition 2.3

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The list of changes below describes all of the changes and enhancements made to IVEE for the new version. Some of the listed enhancements may have been pre-released as part of 2.2 releases. Changes that were pre-released in 2.2 are highlighted in gray.

## New Menu Items

The following new menu items were included in 2.3.

**Note:** As of the release of 2.3, any new menu items that are added to IVEE will be added with No Access by default. Your System Administrator will need to provide access to new menu items by enabling access for user roles in the Administration module.

Module	Menu Item Name and Description	SAR
Human Resources	<b>Combine 834 Insurance Files</b> New menu item added to Human Resources   Insurance Tracking enables you to create a consolidated 834 file for multiple connection groups for the same carrier.	89641
Payroll	<b>Employee Hours Worked</b> New menu item added to Payroll   Reports. This report provides the ability to create a grid listing that will pull in worked hours based on a deduction type. This will give you the ability to track hours tied to a deduction	83280



Module	Menu Item Name and Description	SAR
	<p><b>Primary WorkSites</b></p> <p>New menu item to enable you to identify primary work sites for your employees.</p>	84272
<b>Security</b>	<p><b>Change Log Email Alerts</b></p> <p>New menu item added to Workflow Configuration menu to enable you to define your own email alerts related to changes in the Change Log.</p>	78435
	<p><b>IV - Info-Link</b></p> <p>New menu item added to the Security Reports menu enables you to develop reports including user security information.</p> <p>Pre-released in 2.2.</p>	59317
	<p><b>Create Provisional Database</b></p> <p>New menu item added to the Workflow Configuration enables you to create a database you can use for testing or position budgeting without having to use your live data. The ability to create a provisional database is enabled in the Administration module.</p>	88525
<b>Human Resources</b>	<p><b>Benefit Payments</b></p> <p>New menu item enables you to track benefit prepayments, track employee manual contributions, and generate invoices to carriers.</p> <p>Pre-released in 2.2.</p>	75242
	<p><b>Master Project Status</b></p> <p>This new menu item is also part of the new Grants Project Tracking module. It is used to define project status codes. This module has its own license key. The menu item appears on the General Ledger Configuration menu.</p>	1974

## Accounts Receivable

Menu Item/Function	Description	SAR
<b>Account Activity Statement</b>	<b>Enhancement:</b> Reformatted the Account Activity Statement	75137
<b>Accounts Receivable Default Settings</b>	Changed the software to generate an error message when the Percentage or Days fields are left blank.	87177
<b>Control Panel</b>	<b>Enhancement:</b> Added Invoice Number and Customer selection fields to the Control Panel Filter Criteria.	73496
<b>Customer Maintenance</b>	Corrected a problem with the program saving the category assigned to a customer if the category was not checked as primary.	88122
<b>Invoices</b>	<b>Enhancement:</b> Added ability to set Posting Date of the Journal Entry created when an AR invoice is re-opened.	78236
	When revising open invoice by adding new detail line, the journal entry will now post to GL with the correct date and a memo.	85364
	Corrected a rounding problem when editing an invoice with a large amount.	89983
	<b>Enhancement:</b> Changed the printed invoices to include the contact telephone extension number if it is available.	85968
<b>Deposit Processing</b>	<b>Enhancement:</b> Posting a deposit will now automatically print the deposit ticket along with the journal entry.	75331
<b>Payment Processing</b>	<b>Enhancement:</b> Added Received From field to the Payment Processing grid.	73652



## Administration

Menu Item/Function	Description	SAR
<b>Active Directory</b>	Corrected a problem with Active Directory during login.	89670
<b>Connection Groups</b>	<b>Enhancement:</b> Added two new Actions menu options to either Grant All Users Access or to Remove All Users Access to a connection group.	78557
<b>User Roles</b>	<b>Enhancement:</b> New menu items will now be added to IVEE with a default of "No Access." Your System Administrator will need to provide access to the new menu items through User Roles in the Administration modules before your users will be able to see or use the new menu item.	67434

## Fixed Assets

Menu Item/Function	Description	SAR
<b>Asset Maintenance</b>	Removed the Delete function from the grid and the Asset screen.	75235
<b>Asset Detail Maintenance</b>	Removed the Delete function from the grid.	75235
	<b>Enhancement:</b> Increased the size of the Notes field on the Status tab to 255 characters.	73867

## General Ledger

Menu Item/Function	Description	SAR
<b>Account Code Input</b>	<p><b>Enhancement:</b> Changed the software to not allow the deletion of an account when the account is used on:</p> <ul style="list-style-type: none"> <li>▪ PO Revisions</li> <li>▪ iVisions budget adjustment requests</li> <li>▪ PARs</li> <li>▪ Position accumulations</li> </ul>	81355

Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added new options to the grid's Filter Criteria to display just those account not assigned to a DAC or not assigned to a budget control group.	75730
	<b>Enhancement:</b> Expanded the Assign Budget Control Groups utility to enable you to also remove accounts from a budget control group.	86260
<b>Account Detail</b>	<b>Enhancement:</b> Added date range criteria to each of the tabs.	75937
	Corrected a problem with the totals in Account detail screen not clearing.	83744
<b>Bank Account Transfer Utility</b>	The Bank Account names in the Transfer From Bank and Transfer To Bank drop-downs are now sorted alphabetically by bank.  This was a problem in SQL Server 2005 only.	83291
<b>Board Members</b>	Changed the software to allow an apostrophe in Board Members names.	89101
<b>Budget Clearing Utility</b>	<b>Enhancement:</b> Changed the screen to stay open after you take one of the options so that you can continue to clear budget columns. You now need to click Cancel to exit the screen.	55353
<b>Budget Control Group Report</b>	Corrected a problem with running the report when there is only one DAC in the database.	83477
<b>Budget Export</b>	<b>Enhancement:</b> Added a Notes field to the export.	71384
<b>Budget Import</b>	<b>Enhancement:</b> Added a Notes field to the import.	71384
<b>Check Manager</b>	<b>Enhancement:</b> The employee's name will now print out on the report that prints after voiding a pay check.	62559
	<b>Enhancement:</b> Added the Customer Account from Vendor Maintenance to expense checks for Standard, Type Y and Type C check formats.	6537
<b>Deposit Manager</b>	<b>Enhancement:</b> Added fiscal year to the deposit ticket.	57847



Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a Show Detail selection to the Filter Criteria in the grid.	81989
	Changed the software to avoid the potential for having duplicate deposit numbers if multiple users were entering deposits at the same time.	85090
<b>General Journal Entry</b>	<b>Enhancement:</b> Changed the software to automatically add a missing account when you use the Transfer to Next Fiscal Year Action and the account does not exist in the new year.	81672
<b>General Ledger Default Settings</b>	<b>Enhancement:</b> Added a check box to suppress payroll encumbrances in the GL Report Writer.	74198
<b>Grants Management Report</b>	<b>Enhancement:</b> Added the ability to limit the report to the current fiscal year.	69913
<b>Journal Detail</b>	Removed the SSN from the journal detail grid.	87088
<b>Operating Statements / Balance Sheets</b>	Corrected a problem with printing Operating Statement By Fund for a fund with no transactions.	84300
	Changed the Account Description column in the report to wrap when necessary.	87064
<b>Position Budgeting</b>	<b>Enhancement:</b> Added an option to the Actions menu to enable you to import detail from a provisional database for payroll budgeting.	89211
<b>Pre Encumbrances</b>	<b>Enhancement:</b> Added logic to pre-encumber assigned hourly time card positions that have zero hours	89266
<b>Process Fiscal Year Rollover</b>	Changed the software to clear pending transactions in the journal entry approval queue during rollover.	83721
	Corrected a rounding problem in the Control Panel with exported POs in the new year.	84865
<b>Purchase Order Rollover Fund Crosswalk</b>	Corrected a problem Main Menu Action items not being available after opening the screen.	82788
<b>Report Writer</b>	<b>Enhancement:</b> Added percentages to the sub total and total lines on the Budget Adjustment report.	67887

Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a new option to enable you to print a report from the Add/Edit screen.	83450
	<b>Enhancement:</b> Made code changes to make the report with detail run faster.	75237

## Human Resources

Menu Item/Function	Description	SAR
<b>Benefits Payments</b>	<b>Enhancement:</b> Added a new Actions menu option to generate a carrier file. The file is an Excel file formatted as a report.	75252
	<b>Enhancement:</b> Modified Invoice generation/GL posting to ignore Contribution Applied amounts. The employer expense posting to GL will not be reduced by Contribution Applied amounts.	86071
<b>Compensation Categories</b>	<b>Enhancement:</b> Two new editable grids have been added to allow users to define account masks or funding descriptions that should be assigned to the compensation category.	79438
	<b>Enhancement:</b> The grids are now also open for benefits. If account masks or descriptions are set for benefits, they will override the wage category.	84761
<b>Contract Maintenance</b>	<b>Enhancement:</b> Changed the text entry fields to be Zoom boxes.	61514
	<b>Enhancement:</b> Added Daily Rate to the contract's Print Options.	63116
	<b>Enhancement:</b> Added employee Seniority Date to the Print Options.	64627
	<b>Enhancement:</b> Added an option to the Print Options to use the position type as the position description for the contract.	73378



Menu Item/Function	Description	SAR
	<p><b>Enhancement:</b> Added the ability to include or exclude Check Location, Position Location, and Department to the Print Options.</p> <p>Also added the ability to include or exclude leave plan information. The fields that will be displayed in the contract will be Description and Rate. The rate will be calculated based on the Leave Rate Start date from Employee Contracts prompt form. If the date is blank, the rate will be calculated based on the system date (today's date). The Leave Plans will appear after the Position and Addenda Information sections and before the new Education section described below.</p>	74569
	<p><b>Enhancement:</b> Added an optional Education information section to contracts. If selected, the information will include Degree, School, Degree Date, Major, Minor, Credits and Hours. The Education section will appear after the new Leave Plan section described above and before the Certificates section.</p>	76597
<b>Contracts</b>	<p><b>Enhancement:</b> Added an option to prevent the printing of the Signature Date on contracts.</p>	75810
<b>EEOC Report</b>	<p>Corrected a problem with the EEOC Report not recognizing Rehire Date when creating records for report.</p>	88603
<b>Employee Beneficiaries</b>	<p><b>Enhancement:</b> Added code to make sure that the Social Security Numbers of all beneficiaries and that of the employee are not the same.</p>	73695
<b>Employee Benefits Enrollment (Portal)</b>	<p>Corrected a problem with deduction posting calculation is not recognizing closed pay periods from previous year after rollover.</p>	77941
<b>Employee Certificates and Endorsements</b>	<p><b>Enhancement:</b> Added a check box to indicate an initial certificate.</p>	77711
<b>Employee Contracts</b>	<p><b>Enhancement:</b> Added a new Position Type field.</p>	73378
<b>Employee Dependents</b>	<p><b>Enhancement:</b> Added code to make sure that the Social Security Numbers of all dependents and that of the employee are not the same.</p>	73695

Menu Item/Function	Description	SAR
<b>Employee Insurance Assignments</b>	<b>Enhancement:</b> Added new Enrollment Comparison Report option to the Actions menu. New report compares new year elections to last year's.	70616
	<b>Enhancement:</b> Added Carrier to the Filter Criteria and to the grid.	74461
	<b>Enhancement:</b> Added the ability to archive insurance assignments. Removed the Delete function from the grid.	75240
<b>Employee Notes</b>	Corrected a problem with printing the Employee Notes report from Employee History   Employee Notes History.	88324
<b>Evaluation Assignment</b>	The next evaluation date will now be the default value for due date rather than evaluation date. Note: Evaluation date will still default to the current date for new evaluations.	86907
<b>HR Document Types</b>	<b>Enhancement:</b> To provide maximum security and to comply with HIPPA type requirements, you will now need to specify which payroll user roles have access to which HR document types.  Added a new Actions menu item to enable you to assign a document type to all user roles.  See the change to Payroll User Roles in the Security section of these notes for additional information.	62592
	<b>Enhancement:</b> Added the ability to indicate that a document should display in the web portal.	85667
<b>Enrollment Report</b>	Corrected a problem with running the report with no carrier selected.	84388
	Corrected a problem with printing a 0 in the Address column.	89113
<b>Human Resources Default Settings</b>	<b>Enhancement:</b> Added fields for Benefits Payment Management.	75242



Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added two new fields to the Benefit Enrollment Settings tab to enable you to enter a customized welcome popup at the beginning of the enrollment process and a confirmation popup at the end of the process.	84848
<b>Insurance Carrier Maintenance</b>	<b>Enhancement:</b> Added a vendor selection field as part of being able to generate carrier invoices.	75242
	<b>Enhancement:</b> Added HD04 logic to the 2300RefHealthCoveragePolicy line. It will replace the HD04 literal with whatever is on the corresponding line in the HD04.	88354
	<b>Enhancement:</b> Added the capability to report benefit and employment termination information on 834 files. Added new check box called "Include Terms" and re-labeled "Full Replacement File" to "Full File".	77613
	<b>Enhancement:</b> Added two new check boxes to the Carrier setup screen called Student Status and Disability Status. If they are checked they will be included in the 834 file.	88579
<b>Insurance Classifications</b>	<b>Enhancement:</b> Added the ability to select a Plan Year Type of Calendar or Other.	64394
	<b>Enhancement:</b> Added additional Flexible Admin Fee Payroll Deduction options to enable districts to have more choices about how to handle the administrative fees: Flex Admin - Prorate, Flex Admin - Full Amount and Flex Admin - One Time.	71513
<b>Insurance Coverage Level Maintenance</b>	<b>Enhancement:</b> Added the Payroll Deduction field to enable you to map a coverage level to a deduction. Removed the Insurance Coverage Crosswalk menu item, since it is no longer needed.	85046
	Corrected an issue with editing records that were "premium/coverage based on individual."	89731
<b>Insurance Type Maintenance</b>	<b>Enhancement:</b> Added Exclude Supplemental Pay indicator to the grid.	77253

Menu Item/Function	Description	SAR
<b>Miscellaneous Tracking Report</b>	Changed the report to only show employee if the position is open (does not show employee in DAC if position is closed). Also changed group by DAC so employee only shows up once if there are more than one open positions for the DAC.	85247
<b>Supervisors</b>	<b>Enhancement:</b> You can now leave the User ID field blank.	85748

## PARs

Menu Item/Function	Description	SAR
<b>HR/PR PAR Completion</b>	<b>Enhancement:</b> Added a new email alert to Security that sends a notification email to PAR requesters when either HR or PR complete the PAR.	86200
<b>PAR Approver Accounts</b>	<b>Enhancement:</b> Add approval sequence to PAR Approver Accounts grid.	59314
<b>PAR Types</b>	<b>Enhancement:</b> Added the Display PAR Type in Portal option to the PAR type definition screen.	77556
<b>New Hire PARs</b>	<b>Enhancement:</b> Added a field for the Replaced Name - which is filled in if it's filled in on the Standard notification email for a New Hire PAR.	70369
<b>Notification Emails</b>	<b>Enhancement:</b> Made the Standard and PIN notification email alerts available for clients who do not have an applicant interface.	81832
	<b>Enhancement:</b> Added PAR Type and whether the position is to be refilled to the Termination and Current Employee Position Assignment notification emails.	83584

## Payroll

Menu Item/Function	Description	SAR
<b>Deduction/Benefits Maintenance</b>	<b>Enhancement:</b> Added a new field to the Settings to enable you to suppress deduction invoices.	75242



Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a new option to the Actions menu to de-activate a deduction for all employees	80971
	<b>Enhancement:</b> Added a new field to the Direct Deposit screen to enable you to specify the length of TIN.	57244
<b>Define Employee Forms</b>	Corrected a problem with Edit mode if using a SQL select statement.	89847
<b>Employee Deductions and Benefits</b>	<b>Enhancement:</b> Added Ins Start Period column to the employee deduction grid.	71366
<b>Employee Leave Plans</b>	<b>Enhancement:</b> Added support for Specific Use Categories	76475
	<b>Enhancements:</b> Added a new Actions menu option to export an Excel "template" you can use for importing transactions from Excel in Fast Leave Entry.	56181
	<b>Enhancement:</b> Added Paid Day off and Mandatory Leave to the Employee Leave Calendar View. Paid Day off has been added as Yellow and Mandatory Leave is Orange	85820
	<b>Enhancement:</b> Added two new options to the Actions menu: Collapse Accruals for Selected Leave Plans and Import Transactions.	78724
<b>Employee Leave Plan Reports</b>	<b>Enhancement:</b> Added a field to select leave plan type to the report prompt. Added leave plan type to the resulting report.	57372
<b>Employee Leave Plan Requests (Portal)</b>	<b>Enhancement:</b> Added a new field to display who approved a request (supervisor or Payroll).	61371
<b>Employee Maintenance</b>	<b>Enhancement:</b> A new column has been added to employee maintenance to show the total of FTEs an employee is assigned to in the pay screen. The field is called Current FTE and will only include those positions whose start date is less than or equal to the system date and whose end date is greater than or equal to the system date.	80003

Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a primary worksite selection field to the screen and grid.	84272
	<b>Enhancement:</b> Added a new field to enable you to select employees who want to have direct deposit receipts emailed to them.	73533
	When adding a position or supplemental pay through Employee Maintenance, the code has been changed so that if you add a record you will not have to re-select the employee name.	74019
	<b>Enhancement:</b> Made code changes to decrease the time it takes to edit an employee record for large districts also using iVisions.	86981
<b>Employee Positions and Pay</b>	<b>Enhancement:</b> Added Start Period and End Period as filter criteria for the grid.	54367
	<b>Enhancement:</b> Added a utility to enable you to import records from CRS Sub Pay.	84308
	<b>Enhancement:</b> Added the ability to choose to include the Project and Projected Amount columns in the grid.	82940
	<b>Enhancement:</b> Added a new pay type of Supplemental-Template. You can use these types of supplementals to define a supplemental that can be assigned to employees via Employee Templates.	67435
	<b>Enhancement:</b> Added an option to the Actions menu to enable you to vacate multiple positions at the same time.	74505
	<b>Enhancement:</b> In the Change Payroll Funding screen, the Fund Balancing Offset field has been renamed Fund Rounding Offset.	?
	<b>Enhancement:</b> Added Position Days and Work Calendar Days to the grid.	84157



Menu Item/Function	Description	SAR
	Changed the software to allow you to sum the columns in a grid listing.	84738
	<b>Enhancement:</b> You can now use an Employee ID other than SSN for the Supplemental Import from Excel actions.	84210
	<b>Enhancement:</b> Removed the logic that prevented the system from doing a distribution if the paid to date was greater than the position amount. This will allow a position to go negative.	86411
	<b>Enhancement:</b> This change applies to the CRS Sub System interface. Changed the Import from CRS Sub Pay action so that if the hours are zero and the days are zero, then you get an error on the error report. If hours = 0 and days is not zero, then hours = hours on the template * the number of days in the file rounded to 4 decimal place	89488
	Changed to disable the Create Vacancy action when the show funding detail option is selected.	86578
	<b>Enhancement:</b> Added logic to pre-encumber assigned hourly time card positions that have zero hours.	89266
<b>Employee Templates</b>	<b>Enhancement:</b> Added the ability to define supplemental pay templates.	67435
<b>Employee Time Card Entry</b>	<b>Enhancement:</b> To facilitate hours entry, the Employee Time Card Entry grid has been changed to an editable grid.	67258
	<b>Enhancement:</b> Removed edit that prevented duplicate account codes.	89504
<b>Employee YTD Accumulations</b>	<b>Enhancement:</b> Added a new Actions menu option to Import YTD Deduction Adjustments. Renamed the previous existing to Import YTD Wage Adjustments	78987
<b>Fast Leave Entry</b>	<b>Enhancement:</b> Added a new Actions menu option to import fast leave entry transactions from Excel.  Also added Employee ID field to the screen.	56181

Menu Item/Function	Description	SAR
<b>Leave Plans</b>	<b>Enhancement:</b> Added a new utility to enable you to define specific use categories for each leave plan.	76475
	<b>Enhancement:</b> Added new fields to indicate Specific Use Total FY Maximum and Grouping Codes for specific use categories.	80295
<b>Multiple Worksite Report</b>	<b>Enhancement:</b> Added a field to enable you to choose whether you want to sort the report by check location or primary worksite.	84272
<b>Payroll Default Settings</b>	<b>Enhancement:</b> Made the Print Accumulations for Deductions/Benefits with No Current Period Amounts option available to ASCII users.	67658
	<b>Enhancement:</b> Added the ability to select the type of date to use to calculate Years of Experience This Employer. A drop-down list for the selection is on the Advanced tab.	73618
	<b>Enhancement:</b> Added an option to enable you to use control codes on supplemental pays.  Also rearranged the screen to add a new Advanced tab.	81819
	<b>Enhancement:</b> Added a new option Allow FTE on Supplemental. If the option is selected, then the system will allow FTEs to be set on supplemental pay records.	75117
<b>Payroll Invoice Processing</b>	<b>Enhancement:</b> Added an option to the Filter Criteria to Show Check Status. If selected, it adds the Check Status column to the grid.	72036
<b>Payroll Journal</b>	<b>Enhancement:</b> The employee's name will now print out on the reports that prints after voiding a direct deposit.	62559
<b>Payroll Processing</b>	Added logic to check whether an employee has no deductions when closing payroll. If an employee has no deductions, then the system will stop payroll and require that you re-compute.	87161



Menu Item/Function	Description	SAR
<b>Position Control</b>	<b>Enhancement:</b> Added Position Category, Cert/Class, State Position Code, State Position Description columns to the screen that displays when you take the Show Positions Action.	84882
<b>Print Direct Deposits/Pay Receipts</b>	<b>Enhancement:</b> Added a field to enable you to control the "from" email address.	79347
	<b>Enhancement:</b> You can now sort the printed receipts by Check Location or Name.	69723
<b>Publish Pay Information (Portal)</b>	<b>Enhancement:</b> Added a new option to enable you to choose whether you want to include benefit information in the published pay information.	80620
	<b>Enhancement:</b> Added the ability to alert employees via email when their pay stub information has been posted to iVisions.	71494
<b>Salary Schedules</b>	<b>Enhancement:</b> Added a new utility to automatically advance employees.	80172
	<b>Enhancement:</b> If a user does not have the authority to generate positions, when they Move employees on a schedule, the system will now inform them that the positions haven't been generated and someone else needs to generate them. It also won't change them to "Ready to Pay" if they were "Assigned by HR" and will mark them "Assigned by HR".	78282
<b>W-2 Processing</b>	Changed the code to print leading zeros for SSN's on the W2 Validation report.	72342
	<b>Enhancement:</b> Added the ability to print a W-2 for a single employee.	74904
	<b>Enhancement:</b> Added the check location to the bottom left of the pressure sealed W-2 form. This enhancement is for those districts that hand out W-2s rather than mail them.	74923
<b>Work Calendars</b>	<b>Enhancement:</b> Added a utility to mark work calendar days as "mandatory leave" and post them to employee leave plans.	74409

## Purchasing and Payables

Menu Item/Function	Description	SAR
<b>1099s</b>	<b>Enhancement:</b> Added an entry to the Validation Report to indicate vendors who are not marked as a 1099 vendor who also have 1099 invoices. The code has been changed to generate 1099s only for vendors marked as 1099 vendors and invoices marked as 1099 for that vendor.	49729
<b>Control Panel</b>	<b>Enhancement:</b> Added the field "Part Number" to the Control Panel grid. The field only displays when the Show Account Detail option is selected.	75359
	<b>Enhancement:</b> A Submit for Approval option has been added to the lower left of the Requisition screen. This check box allows the requisition originator to submit for approval without having to go to the approval screen.	85224
	Corrected an error that occurred when an apostrophe in a requesters name.	89969
<b>Distribution Detail Listing</b>	<b>Enhancement:</b> Expanded the Description field on Disbursement Detail Listing. If the given detail text is longer than 25 characters, it will scroll to the second line.	77138
<b>Invoice Processing</b>	<b>Enhancement:</b> Added a new option to the Invoice screen to enable originators to approve the invoice in IVEE rather than having to go to iVisions to do the originator's approval.	80631
	<b>Enhancement:</b> Added the PO Reference and PO Project fields to the General Information tab.	73631
	Corrected the sequencing of the purchase orders listed in the Purchase Order drop-down.	83124
	<b>Enhancement:</b> Added the ability to sort the displayed lines for a PO by line, description, or part number.	77705



Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a DAC column to the grid.	83322
	<b>Enhancement:</b> Changed the Quick Invoice screen to stay in the 3 column format until you either choose a PO or Cancel this entry session.	83541
	Changed the program to recalculate Use Tax when the Action to "Remove Paid Items" is taken	85185
<b>Pay History Report</b>	<b>Enhancement:</b> Added an Award Number column to the report	55812
<b>PO Board Report</b>	<b>Enhancement:</b> Added an optional utility to enable you to generate a report of purchase orders for Board review. If you activate this option, the Purchasing Control Panel will activate two new options, the Requisitions/Purchase Order screen in IVEE will have an additional tab, and iVisions will provide additional fields for gathering the needed information.	76699
	<b>Enhancement:</b> When a PO is revised, if there is a Board report date, a prompt will be given asking if the user wants to clear the board report date.	88617
<b>Purchase Order Approvals</b>	<b>Enhancement:</b> Added the option to display the Approval Log to the Actions menu.	85126
<b>Print Purchase Orders</b>	<b>Enhancement:</b> Added a column to indicate whether the purchase order has documents attached.  Added a Manage Documents option to the Actions menu.  Added a Print PDF action to the Manage Requisition Documents screen.	55861
	<b>Enhancement:</b> Added PO Number and Vendor to the Filter Criteria fields.	85129

Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a new field to the screen (ePO) to indicate whether the purchase order is a result of eShopping.	75018
	<b>Enhancement:</b> Added column for "PO Amount" to the grid.	89682
<b>Print Requisitions</b>	<b>Enhancement:</b> Added filter criteria for PO Number, Vendor, and DAC.	85131
<b>Purchase Order Receiving</b>	<b>Enhancement:</b> Added the Manage Documents option to the Actions menu to enable you to attach documents to POs.	54767
<b>Purchasing and Payables Default Settings</b>	<b>Enhancement:</b> Added a new option to enable you to have the system print internal notes on requisitions.	81707
	<b>Enhancement:</b> New option enables you to print the approval log on the File copies of purchase orders and Warehouse requisitions.	62623
	<b>Enhancement:</b> Added a new option to enable you to specify a message to be included in the email when emailing POs to vendors.	85119
<b>Purchase Requisition Approval</b>	<b>Enhancement:</b> You can now display the approval log from the requisition approval screen.	85126
<b>Receiving</b>	<b>Enhancement:</b> Added a DAC filter criterion to the grid.	73155
<b>Requisition Approval</b>	<b>Enhancement:</b> Added Requisition User ID to the grid.	85128
<b>Vendor Awards</b>	<b>Enhancement:</b> You can now assign the same award number to more than one vendor.	73389
<b>Vendor Maintenance</b>	Corrected a problem with using a vendor that has been added in prior fiscal year after rollover.	84212



## Security

Menu Item/Function	Description	SAR
<b>Access Log</b>	<b>Enhancement:</b> Added a new Actions menu option to delete access log records.	78452
	<b>Enhancement:</b> The iVisions My Workflow screens will now write to the Access Log when opened from the menu. The IP address will be written to the computer name field as well as the computer name (if the user is in network).	71039
<b>Approvers</b>	The system will now also delete any alternates for that approver/DAC combination if you delete the approver.	89691
<b>Change Log</b>	<b>Enhancement:</b> Added date range filter criteria and also added a new field that displays the employee or position, as appropriate.	76170
<b>Change Log Email Alerts</b>	<b>Enhancement:</b> Added the ability to define your own email alerts based on changes recorded in the Change Log.	78435
<b>Email Alerts</b>	<b>Enhancement:</b> Added a new alert to inform approvers when there are budget journal entries to approve.	78757
	<b>Enhancement:</b> Added an email alert for invoice approvals.	77183
	<b>Enhancement:</b> Added an email alert for when assignment status is set to Assigned by HR.	77067
	<b>Enhancement:</b> Changed the email alert for expiring employee certificates so that if you put in an email address in "Employee Expiring Certificates" in the "Email Address" field, the system will use that email address for a "CC" on the email. The email will go to the employee's email address (in the employee record) and a copy will be sent to this email address.	76572
	<b>Enhancement:</b> Added email alerts for Employee Evaluations Due and Employee Evaluation Follow Ups Due.	73675

Menu Item/Function	Description	SAR
	<p>Changed the following email alerts to first look in security database, see if there is an email address, and if so, use that email address for the "To" email address. If not, then it will try to use the email address in the employee record in employee maintenance as to "To" email address.</p> <ul style="list-style-type: none"> <li>▪ Invoices to Approve</li> <li>▪ Purchase Requisitions to Approve</li> <li>▪ Budget Journal Entries to Approve</li> <li>▪ Transaction Journal Entry to Approve</li> <li>▪ PARs To Approve</li> <li>▪ WH Requisitions to Approve</li> </ul>	72072
	<p><b>Enhancement:</b> Added a new email alert to Security that sends a notification email to PAR requesters when either HR or PR complete the PAR.</p>	86200
<b>Payroll User Roles</b>	<p><b>Enhancement:</b> Added a tab to enable you to define the employee documents each user role can access.</p> <p>When this enhancement is loaded, <b>no</b> users will have access to any HR documents. Each document type you want the particular group to use will have to have it added. This is for maximum security and to comply with HIPPA type requirements.</p>	62592
<b>PAR Approvers</b>	<p><b>Enhancement:</b> Added a new type of email notification option (Standard). Unless you use the PIN system, you should use the Standard Email type for email notifications.</p>	70366
<b>Portal Default Settings</b>	<p><b>Enhancement:</b> Added a new option to enable you to limit the display of positions in iVisions Positions and Pay to DAC only.</p>	81818
<b>User Listing</b>	<p>Corrected a problem with the report displaying only global users.</p>	87735
<b>User Security</b>	<p><b>Enhancement:</b> Added the Allow Add Blanket PO Line Action to the P&amp;P Security options.</p>	74531



Menu Item/Function	Description	SAR
	<b>Enhancement:</b> Added a new setting to the HR/PR Security Options tab that controls whether a non-PR/HR user is able to see all of the PARs assigned to their DAC or just the PARs they have entered.	70488

## Substitute Interface

Menu Item/Function	Description	SAR
<b>Employee Positions and Pay</b>	<b>Enhancement:</b> This change applies to the CRS Sub System interface. Changed the Import from CRS Sub Pay action so that if the hours are zero and the days are zero, then you get an error on the error report. If hours = 0 and days is not zero, then hours = hours on the template * the number of days in the file rounded to 4 decimal place.	89488
<b>SI - Import Leave</b>	<b>Enhancement:</b> Added the ability to crosswalk the specific use categories when importing from a sub file	82830
	Corrected a problem with the import file not recognizing employee name when there was no leave plan match (for SEMs).	85097
<b>Time Card Entry</b>	When using the import Hours from ASCII File option, when entries are found for positions that are not linked to an employee, the system will issue an error message.	89590

## System

Menu Item/Function	Description	SAR
<b>Set Preferences</b>	<b>Enhancement:</b> Added a new screen to enable you to select the color for forms and grid lines.	85081
<b>Spelling Checker</b>	<b>Enhancement:</b> Added a spelling checker utility to large text entry fields (Zoom boxes).	75371

## Warehouse

Menu Item/Function	Description	SAR
<b>Control Panel</b>	<b>Enhancement:</b> A Submit for Approval option has been added to the lower left of the Warehouse Requisition screen. This check box allows the requisition originator to submit for approval without having to go to the approval screen.	85229
	<b>Enhancement:</b> Added Requisition Number and Project to the Filter Criteria for the grid.	85133
<b>Inventory Maintenance</b>	<b>Enhancement:</b> Added Vendor Name (order name), Quantity of Stock on Order, Reorder Quantity, and Reorder Point to the grid.  Also added Quantity of Stock on Order to the screen displayed when ordering Warehouse items in Purchasing and Payables.	86286
<b>Items at Reorder Point</b>	<b>Enhancement:</b> Added bin location to the report. Also added a new field to enable you to specify a percentage of re-order point for the report.	80818
<b>Print Requisitions</b>	<b>Enhancement:</b> Added Req Number, Warehouse and DAC filter criteria.	85145
<b>Print Shipping Receipts</b>	<b>Enhancement:</b> Added Shipping Number, Warehouse, and DAC filter criteria.	85145
<b>Requisition Approval</b>	<b>Enhancement:</b> Added Internal Notes field to the grid.	56855
	<b>Enhancement:</b> Added the option to display the Approval Log to the Actions menu.	85126
	<b>Enhancement:</b> Added Requisition User ID to the grid.	85128
	Warehouse Requisitions with no detail lines will no longer be shown in the approval queue.  <b>Note:</b> They will still be available from the control panel.	74261



Menu Item/Function	Description	SAR
<b>Ship Warehouse Orders</b>	<b>Enhancement:</b> Added a new option to the Actions menu to enable you to print pick lists by either bin location or item number.	79336
	<b>Enhancement:</b> Added Project to the Order Fulfillment Pick List report.	86290
<b>Quantity Shipped Report</b>	<b>Enhancement:</b> Modified sorting of report by DAC to be by DAC then item number.	79336

## Web Applicant Interface

Menu Item/Function	Description	SAR	Help
<b>Various</b>	<b>Enhancement:</b> Added support for Netchemia.	78571	No change

# State Requirements Code

## Arizona

Menu Item/Function	Description	SAR
<b>AZ - Post Expense Vouchers</b>	Changed the grid to sort descending by name.	83570
<b>AZ - Post Payroll Vouchers</b>	Changed the grid to sort descending by name.	83570
<b>AZ - Post Revenues</b>	Changed the grid to sort descending by name.	83570
<b>Employee Deductions and Benefits</b>	<b>Enhancement:</b> If there is an adjustment to Federal tax, the system will now automatically add it to the accumulations used to AZ state tax deduction.	79675
<b>AZ - SDER Processing</b>	Changed the software so that if the Other field is left blank, the program automatically enters "0" in the field.	87755
	Added Description (Position Type) and Class to the verification report.  Updated code to not check for Experience and Degree for classified positions.	87896

## California

Menu Item/Function	Description	SAR
<b>Account Code Input</b>	<b>Enhancement:</b> Added a progress indicator to account code input screen when assigning/validating SAC accounts.	89922



Menu Item/Function	Description	SAR
<b>CA - Pay Matrix</b>	Moved the Job Class, Bargaining Unit, Seniority from this screen and put them on position record on state data tab.	89239
<b>Employee Maintenance</b>	<b>Enhancement:</b> From the Payroll Journal, added shortcuts to PERS and STRS.	89413
<b>PERS Reporting</b>	<b>Enhancement:</b> Added a new Actions menu item to spring a single record into many records.	89357
	<b>Enhancement:</b> Added a Validation Report to the Actions menu.	89491
<b>STRS Reporting</b>	<b>Enhancement:</b> Added a new Actions menu item to spring a single record into many records.	89357
	<b>Enhancement:</b> Added a Validation Report to the Actions menu.	89357

## Colorado

Menu Item/Function	Description	SAR
<b>CD - ADE Report</b>	Changed the record generation process to resolve a time-out error.	88161
<b>CO - Build Account Balances</b>	Changed to not include inactive accounts when the balance equals to zero in the report.	84264
	Changed to round to two decimal places and eliminate the decimal point when the report is generated.	88112
<b>CO - CDE Human Resources Reporting</b>	<b>Enhancement:</b> Moved the CO-CDE State information fields to Employee Maintenance, State Data tab, and Employee Positions and Pay, State Data tab.  Also moved the Special Education fields.	41905
	<b>Enhancement:</b> Added a new Actions menu option in the Employee Maintenance grid to Update Years of CDE Experience.	89772

Menu Item/Function	Description	SAR
<b>CO - Institution Codes</b>	Removed the program. Instead use the Codes field in HR   Configuration   Education/Credentials   Schools	67300
<b>CO - Special Education Employee Data</b>	Added Special Ed field to position funding. The user will check this box if the funding is considered Special Ed. If a position has 2 funding records, one marked special ed and one not, then the position will appear in both regular and special ed sections of the CDE report.	72243

## Iowa

Menu Item/Function	Description	SAR
<b>State Tax</b>	Fixed problem with an employee who has zero for their taxable wages.	90027

## New Mexico

Menu Item/Function	Description	SAR
<b>NM - STARS Staff Report</b>	Corrected a problem generating the report when district code exceeded 8 characters.	88375
	Changed the software so that If all positions of an employee are excluded then the employee will also be excluded.	70048
<b>NM - STARS Non-District Employees</b>	Enhancement: Added a new menu item to enable you to enter STARS information for non-district employees when needed.	88205

## Oregon

Menu Item/Function	Description	SAR
<b>Employee Positions and Pay</b>	<b>Enhancement:</b> Added OR Wage Code to the grid.	73556