



New World ERP 2018.1

Update Guide

8/22/2018



Empowering people who serve the public®

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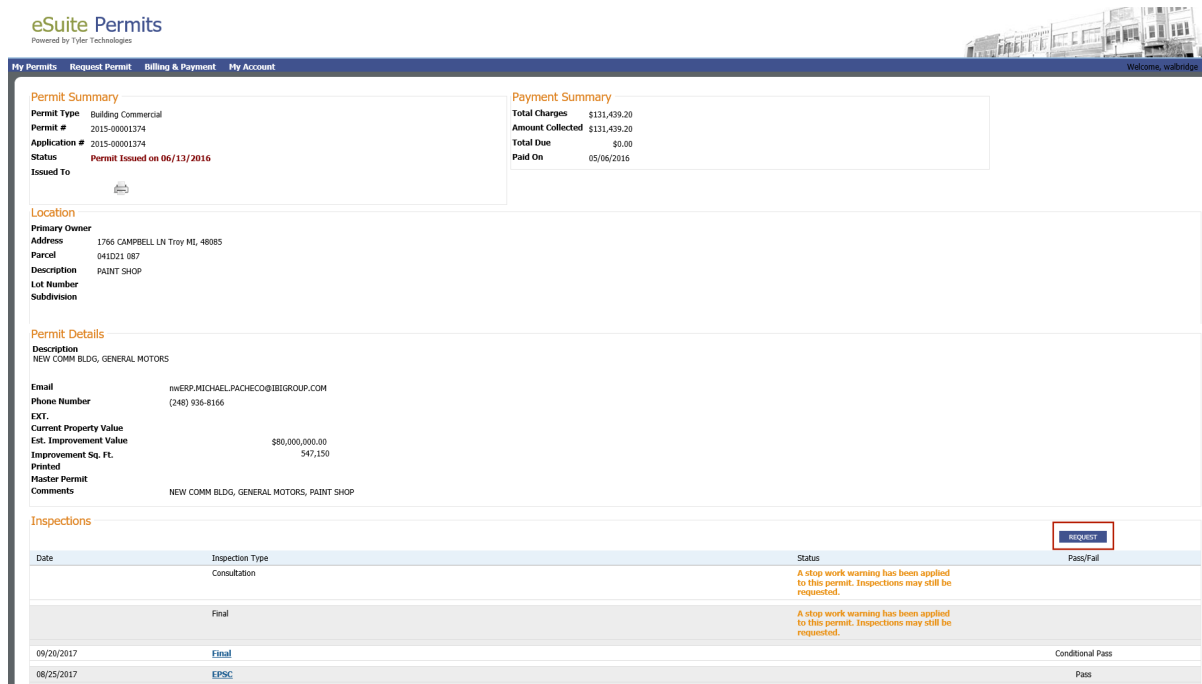
NEW FEATURES IN 2018.1

Community Development ePermits

Request Inspections

ePermits > Permit Number > Inspections Grid

To simplify the process of requesting inspections from the **Inspections grid**, a **REQUEST** button has been added to the top of the *Pass/Fail* column.



eSuite Permits
Powered by Tyler Technologies

My Permits Request Permit Billing & Payment My Account

Welcome, walbridge

Permit Summary

Permit Type Building Commercial

Permit # 2015-00001374

Application # 2015-00001374

Status **Permit Issued on 06/13/2016**

Issued To

Payment Summary

Total Charges \$131,439.20

Amount Collected \$131,439.20

Total Due \$0.00

Paid On 05/06/2016

Location

Primary Owner

Address 1766 CAMPBELL LN Troy MI 48065

Parcel 041D21 087

Description PAINT SHOP

Lot Number

Subdivision

Permit Details

Description NEW COMM BLDG, GENERAL MOTORS

Email mverp.MICHAEL.PACHECO@BIGGROUP.COM

Phone Number (248) 936-8166

EXT.

Current Property Value \$80,000,000.00

Est. Improvement Value 547,150

Improvement Sq. Ft.

Printed

Master Permit

Comments NEW COMM BLDG, GENERAL MOTORS, PAINT SHOP

Inspections

Date	Inspection Type	Status	Pass/Fail
	Consultation	A stop work warning has been applied to this permit. Inspections may still be requested.	REQUEST
	Final	A stop work warning has been applied to this permit. Inspections may still be requested.	
09/20/2017	Final		Conditional Pass
08/25/2017	EPSC		Pass

Clicking this button opens an **Inspections dialog** containing a grid of all inspections available to be requested, with fields for requesting inspection dates and general times.

Permit Details

Description
NEW COMM BLDG, GENERAL MOTORS

Email
nwERP.MICHAEL.PACHECO@IBIGROUP.COM

Phone Number
(248) 936-8166

EXT.

Current Property Value
\$80,000,000.00

Est. Improvement Value
\$47,150

Improvement Sq. Ft.

Printed

Master Permit

Comments
NEW COMM BLDG, GENERAL MOTORS, PAINT SHOP

Inspections

Date	Inspection Type	Status
09/20/2017	Final	Pass
08/25/2017	Final	Pass
06/21/2017	Final	Pass
03/24/2017	Final	Pass
03/03/2017	Final	Pass
01/18/2017	Vents & Ducts	Pass
01/04/2017	Consultation	Pass
11/21/2016	Framing	Pass
07/08/2016	Final	Pass
05/17/2016	Framing	Pass

Inspection Request - Internet Explorer

https://trivmehint.com/tylertechologies.com/eSuite/Permits/ContractorPermitDetailsPage/InspectionRequestPopup.aspx?Id=9946

Inspections

There is a Stop Work Warning associated to this permit. Inspections may still be requested.

Inspection Type: Consultation, Requested Date: Anytime

Final, Requested Date: Anytime

REQUEST **CANCEL**

REQUEST

Pass/Fail

Conditional Pass

Pass

Pass

Pass

Pass

Pass

Pass

Pass

Pass

Once you have made your selections, click the **REQUEST** button at the bottom of the dialog grid. The dialog closes, and the requested inspections appear at the bottom of the ePermits Inspections grid with **CANCEL REQUEST** buttons available for canceling the requests.

If a contractor has a **stop work assigned** to a business, the **REQUEST** button is disabled.

eSuite Permits
Powered by Tyler Technologies

My Permits Request Permit Billing & Payment My Account

Welcome, Michael Pacheco Logout

Permit Summary

Permit Type Building Commercial

Permit # 2015-00001374

Application # 2015-00001374

Status **Permit Issued on 06/13/2016**

Issued To

Payment Summary

Total Charges \$131,439.20

Amount Collected \$131,439.20

Total Due \$0.00

Paid On 05/06/2016

Location

Primary Owner

Address 1766 CAMPBELL LN Troy MI, 48065

Parcel 041021 087

Description PAINT SHOP

Lot Number

Subdivision

Permit Details

Description
NEW COMM BLDG, GENERAL MOTORS

Email
nwERP.MICHAEL.PACHECO@IBIGROUP.COM

Phone Number
(248) 936-8166

EXT.

Current Property Value
\$80,000,000.00

Est. Improvement Value
\$47,150

Improvement Sq. Ft.

Printed

Master Permit

Comments
NEW COMM BLDG, GENERAL MOTORS, PAINT SHOP

Inspections

Date	Inspection Type	Status	Pass/Fail
	Consultation	A stop work block has been applied to this permit. Inspections cannot be requested.	
	Final	A stop work block has been applied to this permit. Inspections cannot be requested.	
09/20/2017	Final		Conditional Pass
08/25/2017	EPSC		Pass

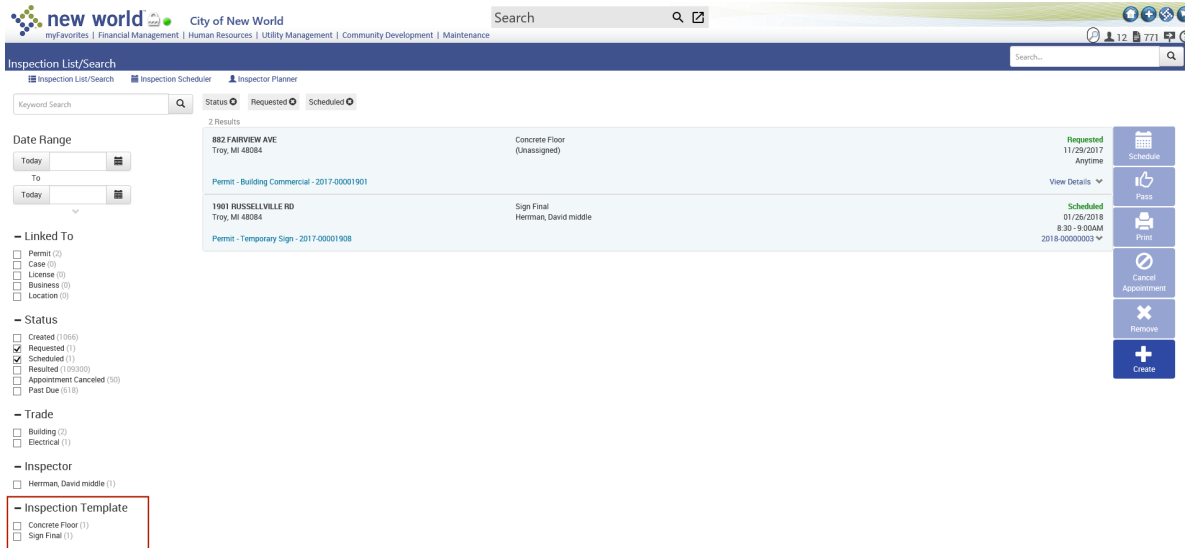
REQUEST

Inspections

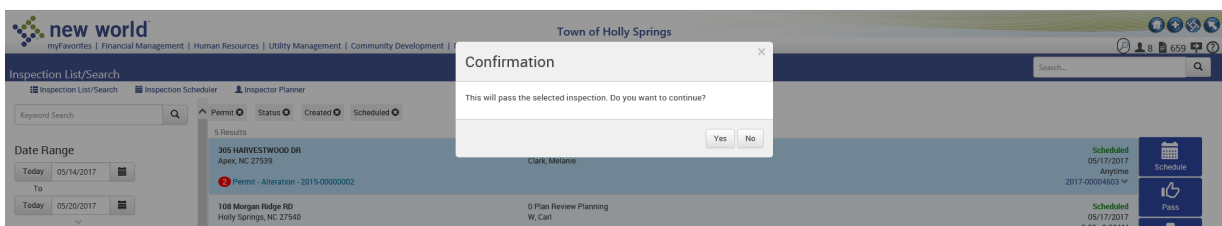
Inspection List/Search Enhancements

Community Development > Inspections > Inspection List/Search

» *Inspection Template* has been added as a search filter on the **Inspection List/Search** page:



- » Internal comments are displayed when you **expand an inspection card** on the Inspection List/Search page and when you navigate to the **History tab** on the parent details pop-up.
- » The width of the quick pass **Confirmation dialog** has been reduced to better fit the contents of the dialog.

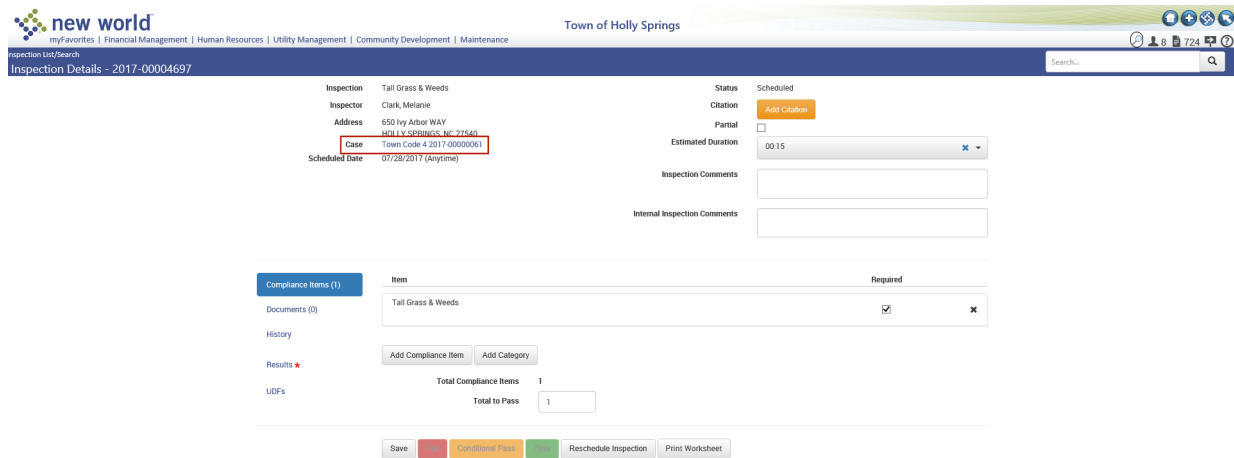


Parent Item Link

Community Development > Inspections > Inspection List/Search > Inspection

The **parent item ID** on the Inspection Details page has been linked to take you to the

details of the parent item.

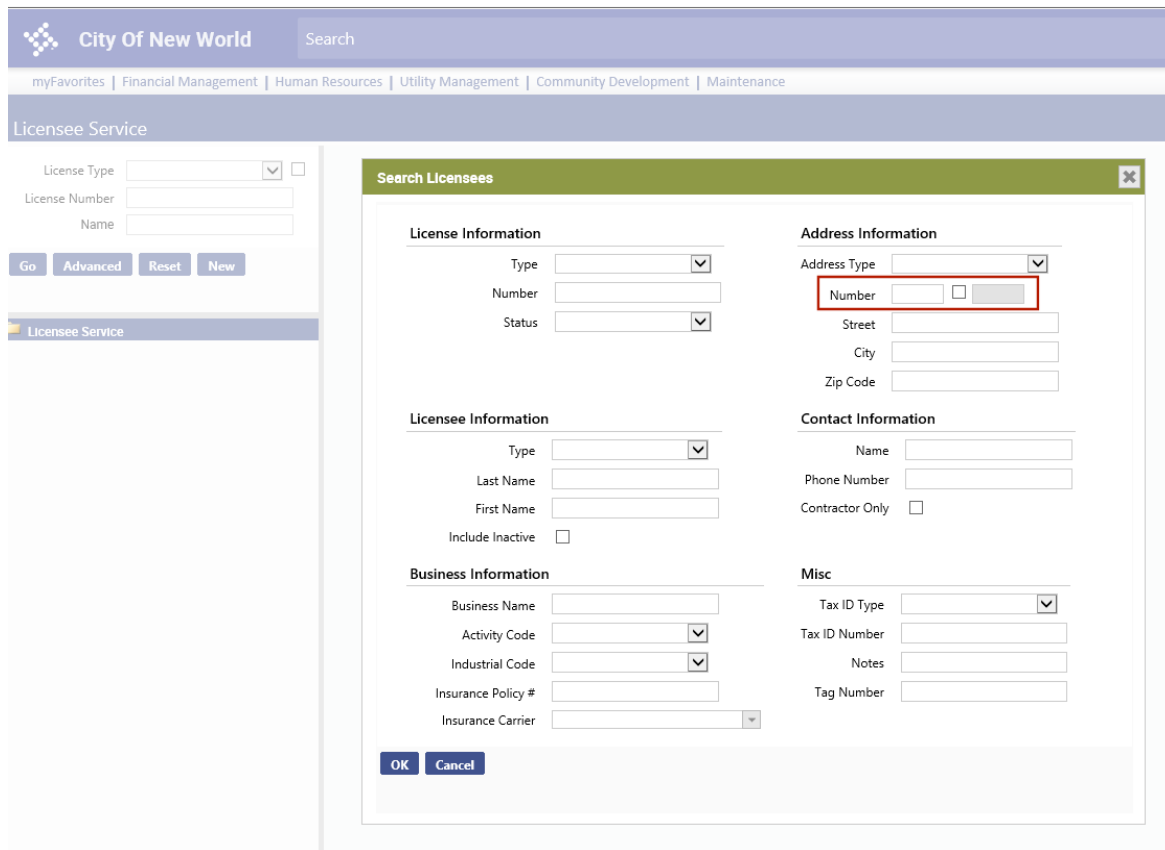


Licensing

Advanced Search Address Range

Community Development > Licensing > Licensee Service > Advanced

The *Number* field on the **Search Licensees dialog** has been modified to let you search a range of address numbers.



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Licensee Service

License Type ☐
License Number
Name

Go Advanced Reset New

Licensee Service

Search Licensees

License Information

Type
Number
Status

Address Information

Address Type
Number ☐
Street
City
Zip Code

Licensee Information

Type
Last Name
First Name
Include Inactive ☐

Contact Information

Name
Phone Number
Contractor Only ☐

Business Information

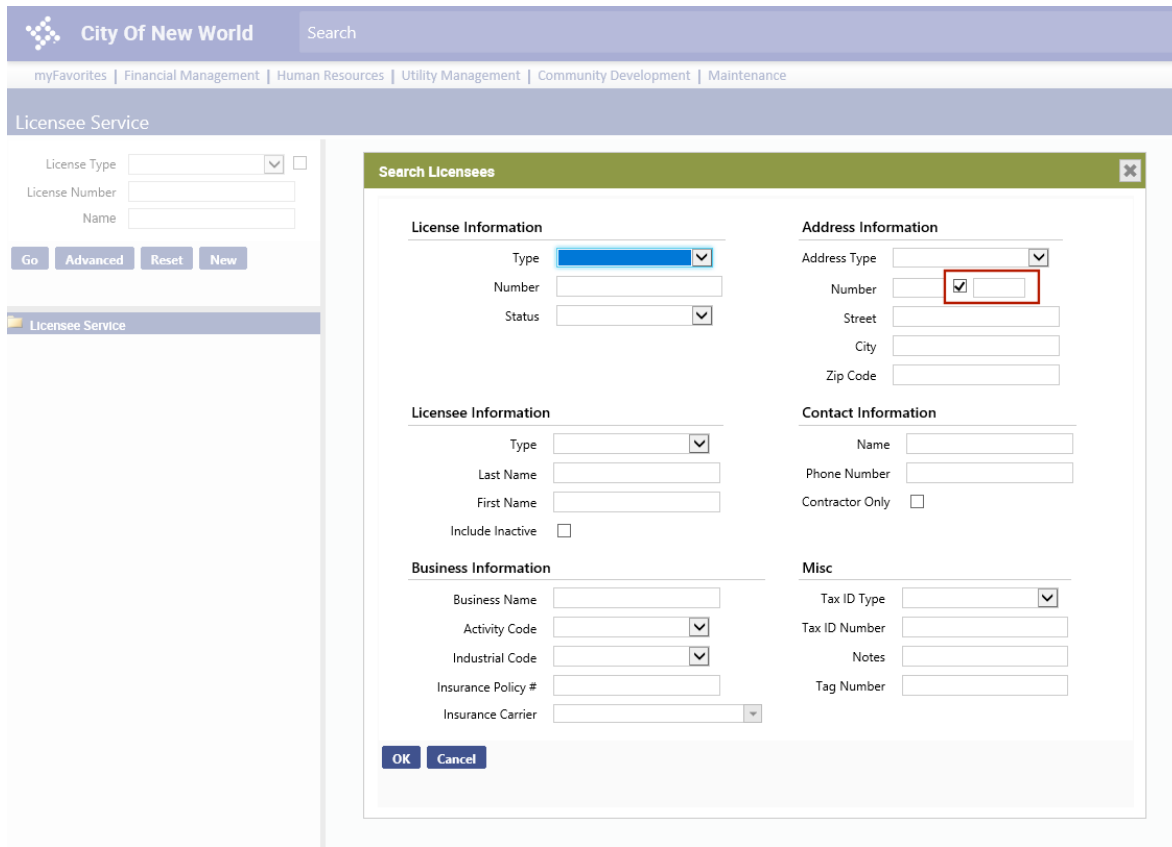
Business Name
Activity Code
Industrial Code
Insurance Policy #
Insurance Carrier

Misc

Tax ID Type
Tax ID Number
Notes
Tag Number

OK Cancel

To enable the *To Number* field, select the **check box** next to it. The check box is deselected by default.



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Licensee Service

License Type ☐
 License Number
 Name

Go **Advanced** **Reset** **New**

Licensee Service

Search Licensees

License Information

Type
 Number
 Status

Address Information

Address Type
 Number ☒
 Street
 City
 Zip Code

Licensee Information

Type
 Last Name
 First Name
 Include Inactive ☐

Contact Information

Name
 Phone Number
 Contractor Only ☐

Business Information

Business Name
 Activity Code
 Industrial Code
 Insurance Policy #
 Insurance Carrier

Misc

Tax ID Type
 Tax ID Number
 Notes
 Tag Number

OK **Cancel**

Hovering over the check box displays the following **tooltip**: "Include a range of addresses."

Address Information

Address Type

Number ☒

Street

City

Zip Code

Include a range of addresses

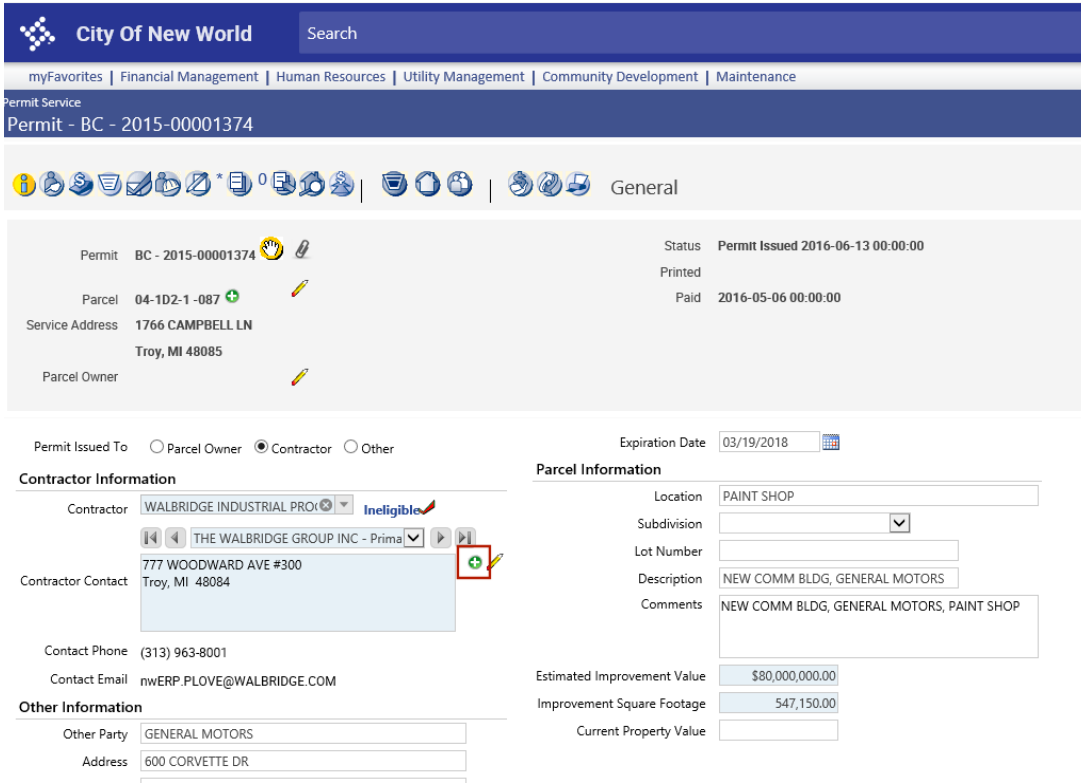
Permits

Add Contractor Contact

Community Development > Permits > Permit Service > Edit Permit > General

The Contractor Information section of the Permit-General page has been modified to let you add a contact for a selected contractor without having to navigate to Licensing.

To add a contact, click the **plus sign**  to the right of the *Contractor Contact* field.



The screenshot shows the City of New World permit management interface. At the top, there is a navigation bar with the City of New World logo and a search bar. Below the navigation bar, there are tabs for myFavorites, Financial Management, Human Resources, Utility Management, Community Development, and Maintenance. The main header area displays "Permit Service" and "Permit - BC - 2015-00001374". Below the header, there is a row of icons for various functions, including a plus sign icon. The main content area is divided into two columns. The left column contains fields for Permit, Parcel, Service Address, and Parcel Owner. The right column contains fields for Status, Printed, and Paid. Below these fields, there is a section for "Contractor Information" and "Parcel Information". The "Contractor Information" section includes a dropdown menu for "Contractor" (WALBRIDGE INDUSTRIAL PRO.), a status indicator "Ineligible", and a "Contractor Contact" field with a plus sign icon. The "Parcel Information" section includes fields for Location, Subdivision, Lot Number, Description, and Comments. Below these sections, there are fields for "Other Information" (Other Party, Address) and "Estimated Improvement Value", "Improvement Square Footage", and "Current Property Value".

City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Permit Service
Permit - BC - 2015-00001374

General

Permit BC - 2015-00001374 Status Permit Issued 2016-06-13 00:00:00
Parcel 04-1D2-1 -087 Printed
Service Address 1766 CAMPBELL LN Paid 2016-05-06 00:00:00
Troy, MI 48085
Parcel Owner

Permit Issued To ☐ Parcel Owner ☒ Contractor ☐ Other Expiration Date 03/19/2018

Contractor Information

Contractor WALBRIDGE INDUSTRIAL PRO. Ineligible
THE WALBRIDGE GROUP INC - Prima
Contractor Contact 777 WOODWARD AVE #300 Troy, MI 48084
Contact Phone (313) 963-8001
Contact Email nwERP.PLOVE@WALBRIDGE.COM

Parcel Information

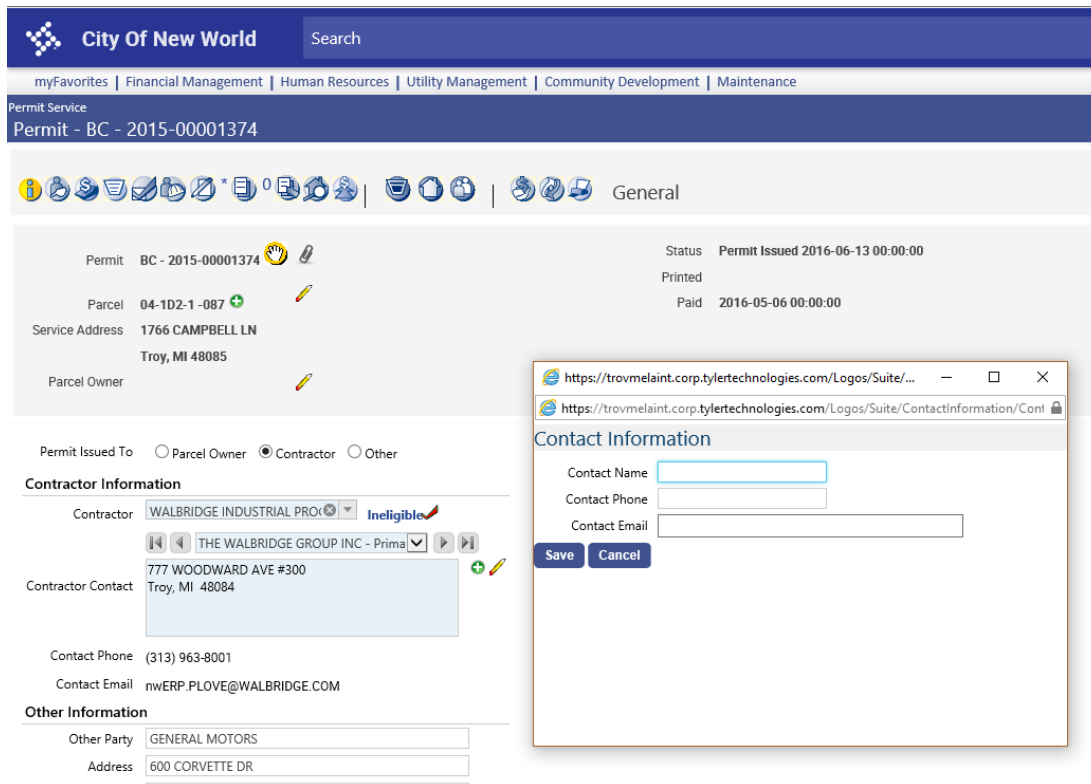
Location PAINT SHOP
Subdivision
Lot Number
Description NEW COMM BLDG, GENERAL MOTORS
Comments NEW COMM BLDG, GENERAL MOTORS, PAINT SHOP

Other Information

Other Party GENERAL MOTORS
Address 600 CORVETTE DR

Estimated Improvement Value \$80,000,000.00
Improvement Square Footage 547,150.00
Current Property Value

The **Contact Information dialog** opens, with fields for the *Contact Name*, *Contact Phone* and *Contact Email*.



The screenshot shows the 'City of New World' Permit Service interface. The main header includes the city logo, a search bar, and navigation links: myFavorites, Financial Management, Human Resources, Utility Management, Community Development, and Maintenance. The current page is 'Permit Service' and the specific permit is 'Permit - BC - 2015-00001374'. Below the header, there's a toolbar with various icons and a 'General' tab selected. The main content area displays permit details: Permit BC - 2015-00001374, Parcel 04-1D2-1-087, Service Address 1766 CAMPBELL LN, Troy, MI 48085, and Parcel Owner. It also shows the permit status as 'Permit Issued 2016-06-13 00:00:00', printed, and paid on 2016-05-06 00:00:00. A 'Permit Issued To' section has radio buttons for 'Parcel Owner', 'Contractor' (selected), and 'Other'. The 'Contractor Information' section shows 'WALBRIDGE INDUSTRIAL PROX' as the contractor, marked as 'Ineligible'. Below this, there's a dropdown for 'THE WALBRIDGE GROUP INC - Prima' and a text box for the contractor contact address: '777 WOODWARD AVE #300, Troy, MI 48084'. The contact phone is '(313) 963-8001' and the contact email is 'nwERP.PLOVE@WALBRIDGE.COM'. The 'Other Information' section has fields for 'Other Party' (GENERAL MOTORS) and 'Address' (600 CORVETTE DR). A 'Contact Information' dialog box is open, showing fields for 'Contact Name', 'Contact Phone', and 'Contact Email', with 'Save' and 'Cancel' buttons.

Add Fee Multi-Select

Community Development > Permits > Permit Service > Edit Permit > Fees > Add Fee

Community Development > Permits > Add Permit > Fees

To make it easy to add multiple fees during the add or edit permit process, the **Add Fee dialog** has been upgraded to provide a multi-select grid of the available fees.

City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Add Permit

Permit **Permit - 2018-0000098** Location **Per** Status **Per**
Parcel **J2 123135** Subdivision **No.** Printed / Paid **No.**
Service Address **56663 Abbywood ST Farmington, OH 48104** Lot Number **Amount \$0.00**
Parcel Owner **QA Import Test 13, cw** Description **Issued To Par**

Location Contractor Other Party Property Application Checklists UDFs Inspections **Fee** Process

Sequence	Fee Description	Applicable Date	Quantity Based On	Quantity	Calculated	Charge
1	Sign Permit Fee		Manual		\$0.00	\$0.00
2	EL Service Only		Manual		\$0.00	\$0.00
222	Temporary Sign		Manual		\$0.00	\$0.00
999	Temporary Sign Monthly		Manual		\$0.00	\$0.00

Add Fee

Sequence Fee Description

☐ Additional Plan Review Fees

☒ 10 Compliance Certificate Fee

☒ 15 EL Additional Wiring

☐ EL Commerical

☐ EL New Service/ReWire <= 100 Amps

☐ EL New Service/ReWire >= 200 Amps

☐ EL New Service/ReWire Manufactured...

☐ EL New Service/ReWire Residential

☐ EL New Service/ReWire Sign

☐ EL Panel Change/Service Repair/Chan...

☒ 25 EL Re-inspection Fee

☐ EL Service Only

OK Cancel

Add Fee

City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Permit Service

Permit - BC - 2015-00001374

Permit **BC - 2015-00001374** Status **Permit Issued 2016-06-13 00:00:00** Location **PAINT SHOP**
Parcel **04-102-1-087** Printed **Subdivision**
Service Address **1766 CAMPBELL LN Troy, MI 48085** Paid **2016-05-06 00:00:00** Lot Number
Parcel Owner **Troy, MI 48085** Description **NEW COMM BLDG, I**

Fee Type Category **Permit Fees**

Sequence	Fee Description	Applicable Date	Quantity Based On	Quantity	Calculated	Charge
10	Occupancy Certificate Fee	12/11/2015	Manual		\$3.00	\$3.00
20	Building Permit Fee	12/11/2015	Estimated Improvement		\$45,750.00	\$45,750.00
31	Pouch Protector Fee	12/11/2015	Manual		\$5.00	\$5.00
40	EPSC Stormwater Fee	12/11/2015	User Defined Field		\$75.00	\$75.00
50	Plan Review - Sprinkler System (head)	02/16/2016	Manual		\$1,490.10	\$1,490.10
60	Plan Review - Sprinkler System (head)	05/06/2016	Manual		\$2,193.60	\$2,043.60

Add Fee

Sequence Fee Description

☐ Additional Plan Review Fees

☐ Building Permit Fee

☒ 11 Compliance Certificate Fee

☐ Demolition Fee

☒ 21 EL Re-inspection Fee

☐ EL Service Only

☐ EPSC Stormwater Fee

☐ Fast Track Fee

☒ 22 Grading Only Permit Fee

☐ House Moving Permit Fee

☐ Identical Plan Review

☐ Manufactured Housing Permit Fee

OK Cancel

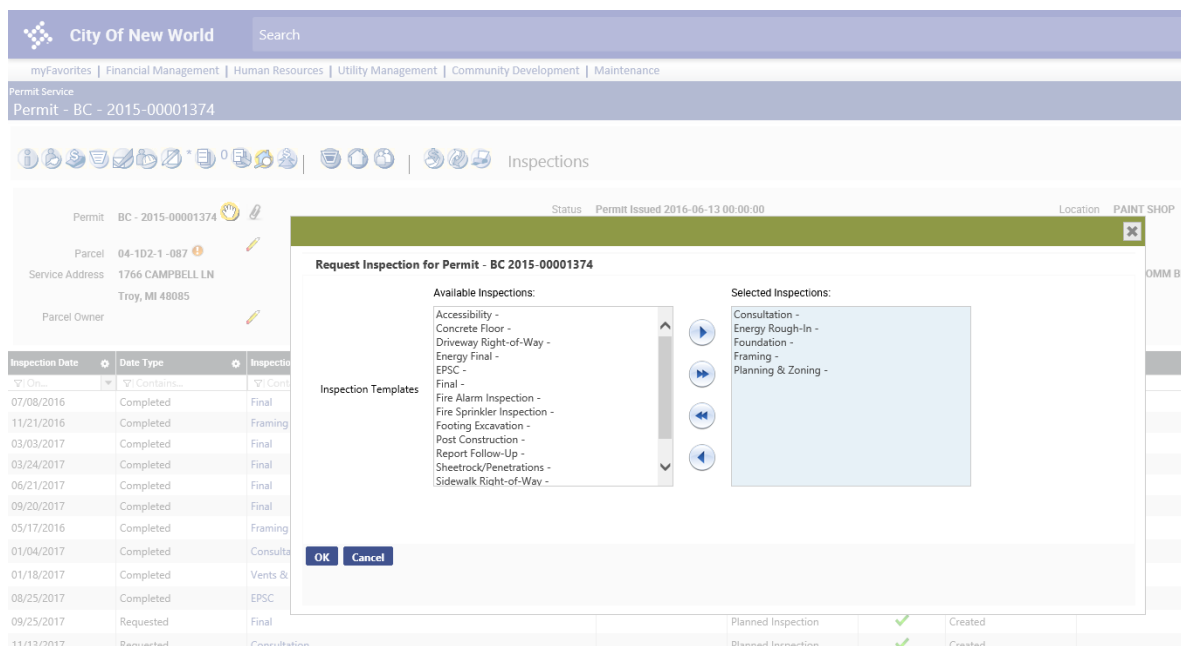
Add Fee

Each row contains a *Fee Description*, an editable *Sequence* field and a check box for selecting the fee.

Add Inspection Multi-Select

Community Development > Permits > Permit Service > Edit Permit > Inspections > Add Inspection

The Add Inspection dialog has been replaced with a **multi-select list box** of the inspection templates available for request.



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Permit Service
Permit - BC - 2015-00001374

Inspections

Permit BC - 2015-00001374

Parcel 04-1D2-1-087

Service Address 1766 CAMPBELL LN
Troy, MI 48065

Parcel Owner

Status Permit Issued 2016-06-13 00:00:00 Location PAINT SHOP

Request Inspection for Permit - BC 2015-00001374

Available Inspections:

- Accessibility - Concrete Floor - Driveway Right-of-Way - Energy Final - EPSC - Final - Fire Alarm Inspection - Fire Sprinkler Inspection - Footing Excavation - Post Construction - Report Follow-Up - Sheetrock/Penetrations - Sidewalk Right-of-Way

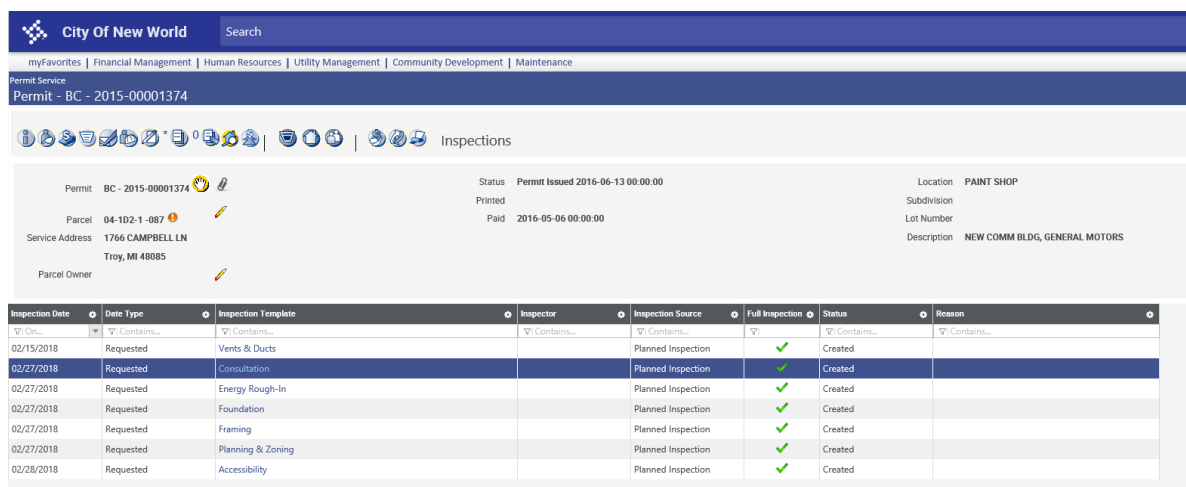
Selected Inspections:

- Consultation - Energy Rough-In - Foundation - Framing - Planning & Zoning

OK Cancel

Inspection Date	Date Type	Inspection	Status	Planned Inspection	Created
07/08/2016	Completed	Final			
11/21/2016	Completed	Framing			
03/03/2017	Completed	Final			
03/24/2017	Completed	Final			
06/21/2017	Completed	Final			
09/20/2017	Completed	Final			
05/17/2016	Completed	Framing			
01/04/2017	Completed	Consultation			
01/18/2017	Completed	Vents & Ducts			
08/25/2017	Completed	EPSC			
09/25/2017	Requested	Final		Planned Inspection	Created
11/13/2017	Requested	Consultation		Planned Inspection	Created

To open this dialog, click the **Add Inspection** button  at the bottom of the page. To request inspections, select them from the *Available Inspections* list box, move them to the *Select Inspections* list box, and click **OK**. The requested inspections are added to the **inspections grid**.



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Permit Service
Permit - BC - 2015-00001374

Inspections

Permit BC - 2015-00001374

Parcel 04-1D2-1-087

Service Address 1766 CAMPBELL LN
Troy, MI 48065

Parcel Owner

Status Permit Issued 2016-06-13 00:00:00

Printed

Paid 2016-05-06 00:00:00

Location PAINT SHOP

Subdivision

Lot Number

Description NEW COMM BLDG, GENERAL MOTORS

Inspection Date	Date Type	Inspection Template	Inspector	Inspection Source	Full Inspection	Status	Reason
02/15/2018	Requested	Vents & Ducts		Planned Inspection	✓	Created	
02/27/2018	Requested	Consultation		Planned Inspection	✓	Created	
02/27/2018	Requested	Energy Rough-In		Planned Inspection	✓	Created	
02/27/2018	Requested	Foundation		Planned Inspection	✓	Created	
02/27/2018	Requested	Framing		Planned Inspection	✓	Created	
02/27/2018	Requested	Planning & Zoning		Planned Inspection	✓	Created	
02/28/2018	Requested	Accessibility		Planned Inspection	✓	Created	

Inspection Details Separate Tab

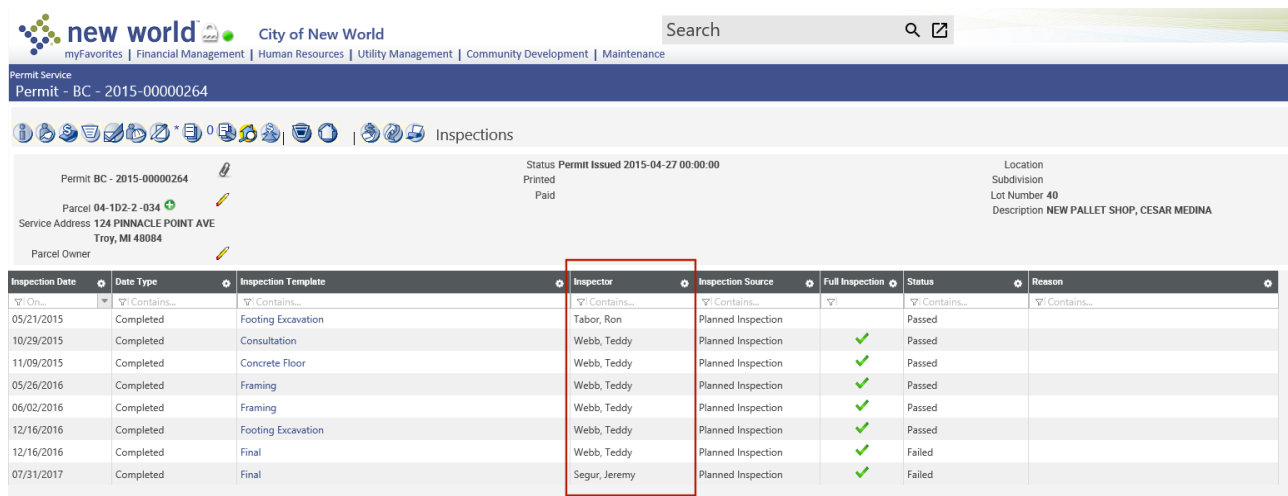
Community Development > Permits > Permit Service > Edit Permit > Inspections > Inspection Template

The *Inspection Template* link on the Permit-Inspections page has been modified to open a separate tab of the inspection details when clicked, letting you return to the Permit-Inspections page simply by closing the tab. **Watch.**

Inspector Column

Community Development > Permits > Permit Service > Edit Permit > Inspections

An *Inspector* column has been added to the grid on the **Permit-Inspections page**, showing you what inspectors have been assigned to scheduled and completed inspections.



new world City of New World
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search

Permit Service
Permit - BC - 2015-00000264

Inspections

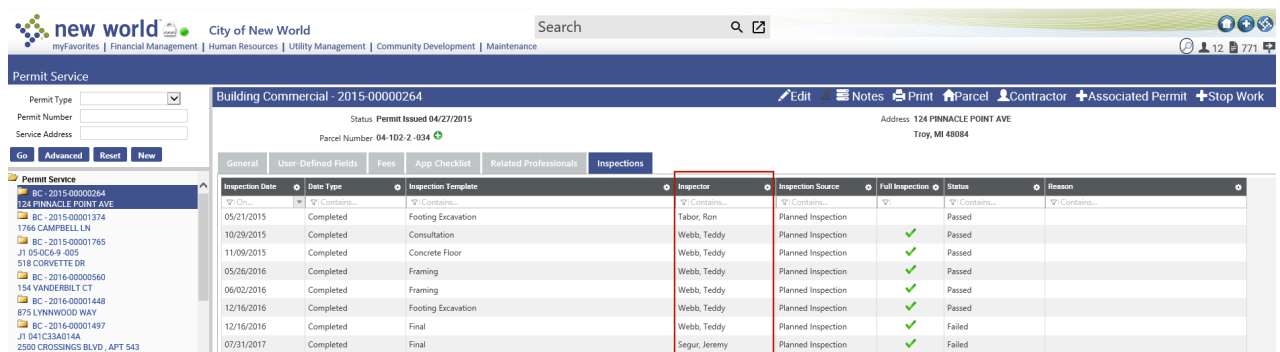
Permit BC - 2015-00000264
Parcel 04-102-2-034
Service Address 124 PINNACLE POINT AVE
Troy, MI 48064
Parcel Owner

Status Permit Issued 2015-04-27 00:00:00
Printed
Paid

Location
Subdivision
Lot Number 40
Description NEW PALLET SHOP, CESAR MEDINA

Inspection Date	Date Type	Inspection Template	Inspector	Inspection Source	Full Inspection	Status	Reason
05/21/2015	Completed	Footing Excavation	Tabor, Ron	Planned Inspection		Passed	
10/29/2015	Completed	Consultation	Webb, Teddy	Planned Inspection	✓	Passed	
11/09/2015	Completed	Concrete Floor	Webb, Teddy	Planned Inspection	✓	Passed	
05/26/2016	Completed	Framing	Webb, Teddy	Planned Inspection	✓	Passed	
06/02/2016	Completed	Framing	Webb, Teddy	Planned Inspection	✓	Passed	
12/16/2016	Completed	Footing Excavation	Webb, Teddy	Planned Inspection	✓	Passed	
12/16/2016	Completed	Final	Webb, Teddy	Planned Inspection	✓	Failed	
07/31/2017	Completed	Final	Segur, Jeremy	Planned Inspection	✓	Failed	

The column also has been added to the grid on the **Inspections tab** in **Permit Service** (Community Development > Permits > Permit Service > Select Permit > Inspections).



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Search

Permit Service

Permit Type
Permit Number
Service Address

Go Advanced Reset New

Building Commercial - 2015-00000264
Status Permit Issued 04/27/2015
Parcel Number 04-102-2-034
Address 124 PINNACLE POINT AVE
Troy, MI 48064

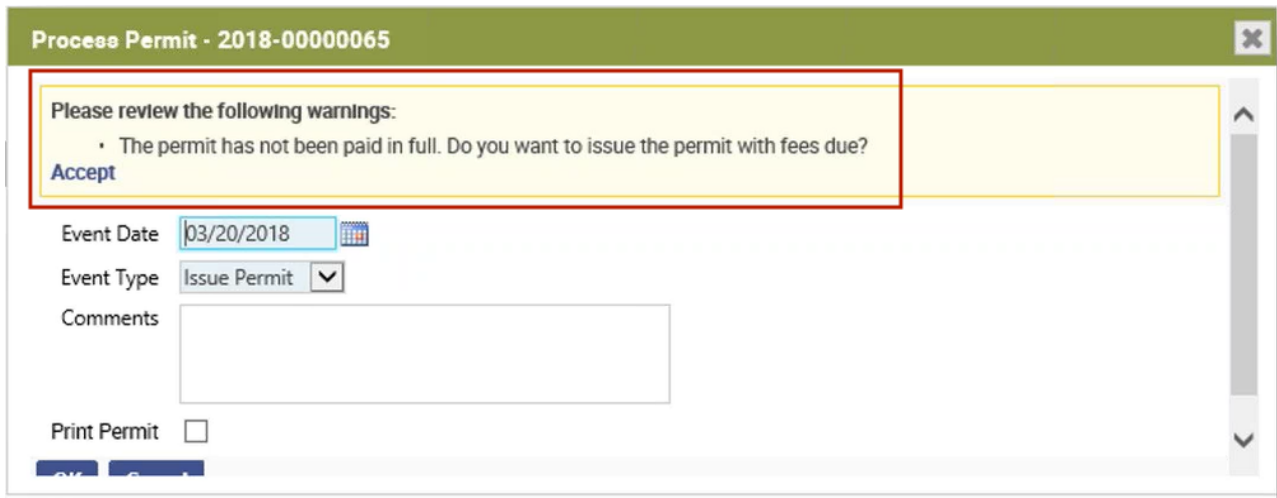
General User-Defined Fields Fees App Checklist Related Professionals Inspections

Inspection Date	Date Type	Inspection Template	Inspector	Inspection Source	Full Inspection	Status	Reason
05/21/2015	Completed	Footing Excavation	Tabor, Ron	Planned Inspection		Passed	
10/29/2015	Completed	Consultation	Webb, Teddy	Planned Inspection	✓	Passed	
11/09/2015	Completed	Concrete Floor	Webb, Teddy	Planned Inspection	✓	Passed	
05/26/2016	Completed	Framing	Webb, Teddy	Planned Inspection	✓	Passed	
06/02/2016	Completed	Framing	Webb, Teddy	Planned Inspection	✓	Passed	
12/16/2016	Completed	Footing Excavation	Webb, Teddy	Planned Inspection	✓	Passed	
12/16/2016	Completed	Final	Webb, Teddy	Planned Inspection	✓	Failed	
07/31/2017	Completed	Final	Segur, Jeremy	Planned Inspection	✓	Failed	

Issue Permit Before Payment

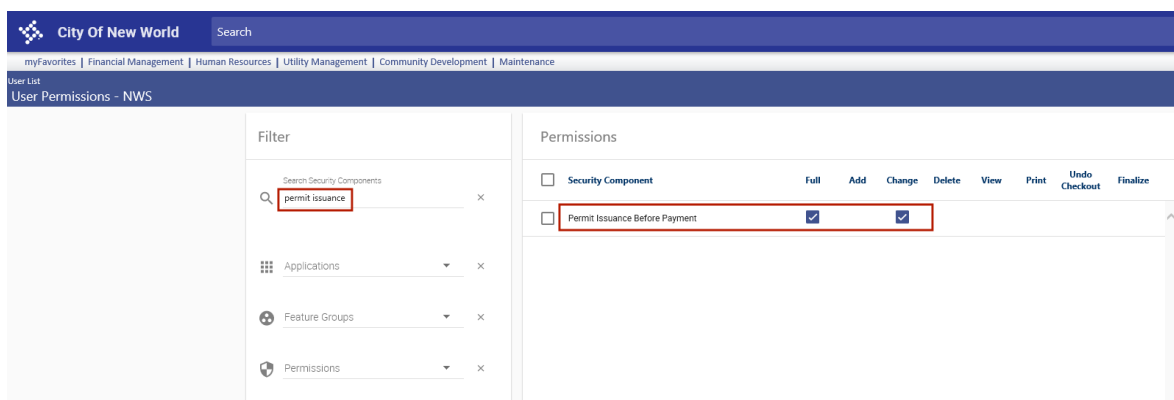
Community Development > Permits > Permit Service > Edit Permit > Process

The **Process Permit** feature has been enhanced to give you the option to issue permits before they are paid in full.



To give a user permission to issue permits with fees due, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > Users.
2. Search for and select the user.
3. Click the **Permissions** button.
4. In the Filter panel, type **permit issuance** in the *Search Security Components* filter (the entry is not case sensitive). The Permissions panel will reload to contain the **Permit Issuance Before Payment security component** only.



Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
Permit Issuance Before Payment	☒		☒					

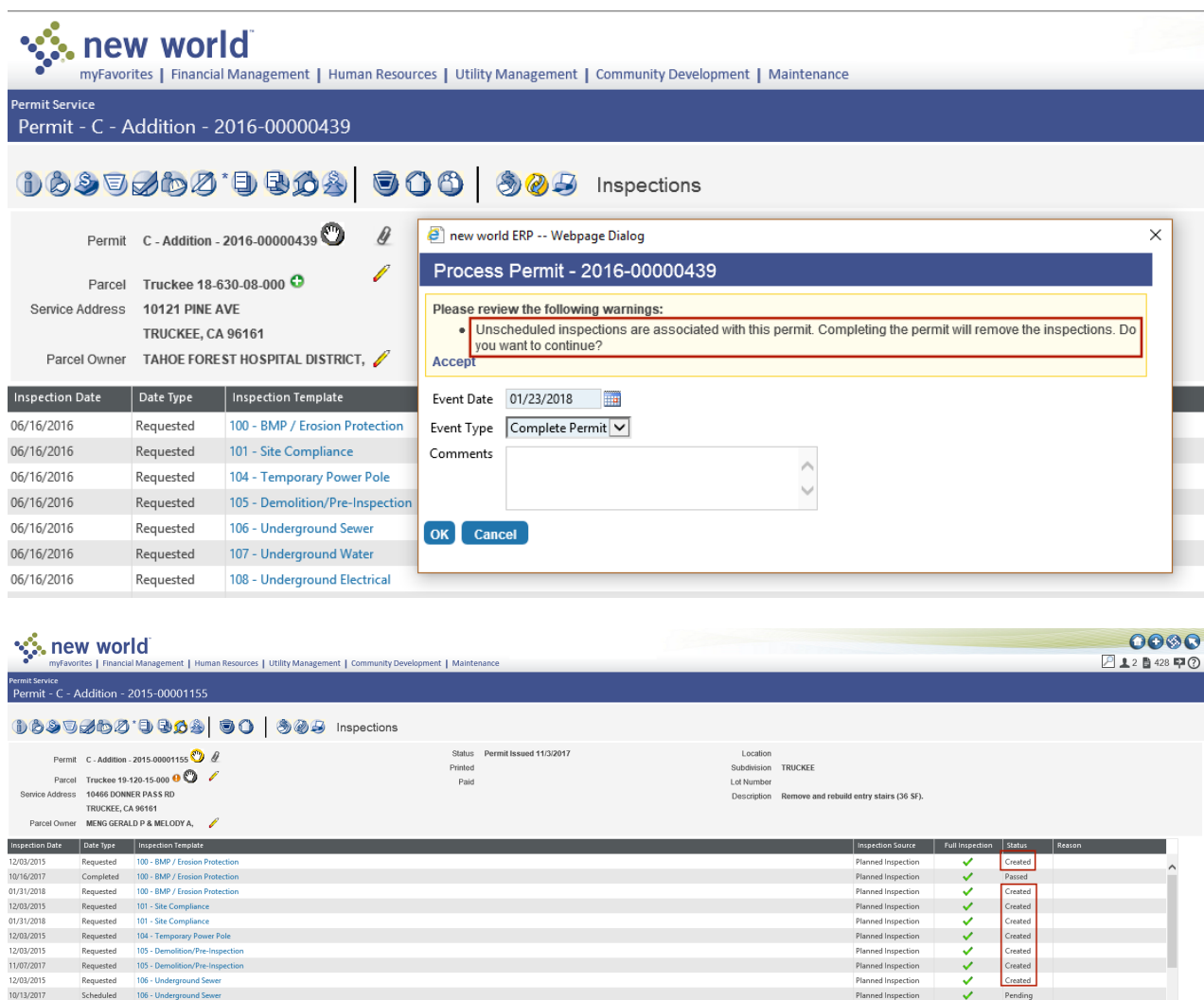
5. Select *Full* permissions.
6. Click **SAVE**.

The permission takes effect after the user has signed off and signed back on.

Remove Unscheduled Inspections

Community Development > Permits > Permit Service > Edit Permit > Process

Completing or canceling a permit from the **Process Permit dialog** removes **unscheduled inspections** associated with the permit. Prior to the removal, a warning message displays with a button to accept the removal.



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Permit Service
Permit - C - Addition - 2016-00000439

Inspections

Permit C - Addition - 2016-00000439

Parcel Truckee 18-630-08-000

Service Address 10121 PINE AVE
TRUCKEE, CA 96161

Parcel Owner TAHOE FOREST HOSPITAL DISTRICT,

Inspection Date	Date Type	Inspection Template
06/16/2016	Requested	100 - BMP / Erosion Protection
06/16/2016	Requested	101 - Site Compliance
06/16/2016	Requested	104 - Temporary Power Pole
06/16/2016	Requested	105 - Demolition/Pre-Inspection
06/16/2016	Requested	106 - Underground Sewer
06/16/2016	Requested	107 - Underground Water
06/16/2016	Requested	108 - Underground Electrical

new world ERP -- Webpage Dialog

Process Permit - 2016-00000439

Please review the following warnings:

- Unscheduled inspections are associated with this permit. Completing the permit will remove the inspections. Do you want to continue?

Accept

Event Date 01/23/2018

Event Type Complete Permit

Comments

OK Cancel

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Permit Service
Permit - C - Addition - 2015-00001155

Inspections

Permit C - Addition - 2015-00001155

Parcel Truckee 15-120-15-000

Service Address 10466 DONNER PASS RD
TRUCKEE, CA 96161

Parcel Owner MENG GERALD P & MELODY A,

Status Permit issued 11/3/2017

Printed

Paid

Location TRUCKEE

Subdivision

Lot Number

Description Remove and rebuild entry stairs (36 SF).

Inspection Date	Date Type	Inspection Template	Inspection Source	Full Inspection	Status	Reason
12/03/2015	Requested	100 - BMP / Erosion Protection	Planned Inspection	✓	Created	
10/16/2017	Completed	100 - BMP / Erosion Protection	Planned Inspection	✓	Passed	
01/31/2018	Requested	100 - BMP / Erosion Protection	Planned Inspection	✓	Created	
12/03/2015	Requested	101 - Site Compliance	Planned Inspection	✓	Created	
01/31/2018	Requested	101 - Site Compliance	Planned Inspection	✓	Created	
12/03/2015	Requested	104 - Temporary Power Pole	Planned Inspection	✓	Created	
12/03/2015	Requested	105 - Demolition/Pre-Inspection	Planned Inspection	✓	Created	
11/07/2017	Requested	105 - Demolition/Pre-Inspection	Planned Inspection	✓	Created	
12/03/2015	Requested	106 - Underground Sewer	Planned Inspection	✓	Created	
10/13/2017	Scheduled	106 - Underground Sewer	Planned Inspection	✓	Pending	

Financial Management

Accounts Payable

Editing Purchasing Card Batch Invoices

In 2018.1, enhancements have been made to allow Accounts Payable users to make limited changes to purchasing card batch invoices *after* they have been imported from the purchasing card file.

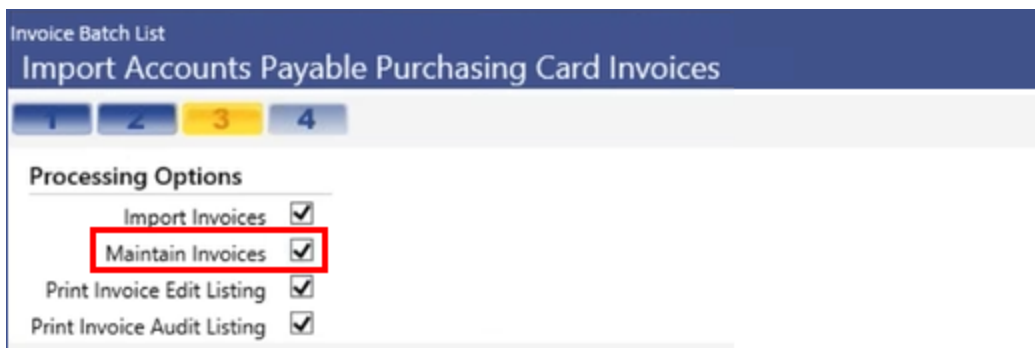
Overview

Purchasing card informational invoices are not editable by default, they must be *made* editable. This is done during the purchasing card import process.

The Import Accounts Payable Purchasing Card Invoices wizard (hereafter referred to as "the import wizard") has been enhanced with the addition of the **Maintain Invoices** check box. Selecting this check box and completing the import wizard makes the purchasing card batch invoices **editable** or **maintainable**.



Note: In this document, the words *editable* and *maintainable* are synonymous and refer to the user's ability to change certain field values in the Invoice Batch entry page.



Invoice Batch List

Import Accounts Payable Purchasing Card Invoices

1 2 3 4

Processing Options

Import Invoices	☒
Maintain Invoices	☒
Print Invoice Edit Listing	☒
Print Invoice Audit Listing	☒

Users can then open the invoices via the Invoice Batch entry page and make any necessary changes.

Keep in mind that only certain fields are maintainable and many of the features normally available to the Invoice Batch entry page are not available in **maintain mode**.

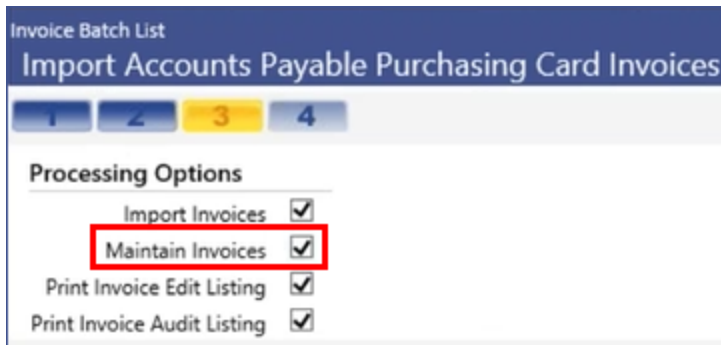
Once a user has made and saved all the necessary invoice changes, the batch must be converted from its maintainable state back to a normal purchasing card batch. When this is completed, all of the features and functionality normally available to the Invoice Batch entry page are restored.

At this point, should a user find that additional invoice changes are necessary, there is a feature that allows the user to return a converted batch back into a maintainable batch, so that additional changes can then be made.

All of this is explained in detail in the following Step-by-Step section.

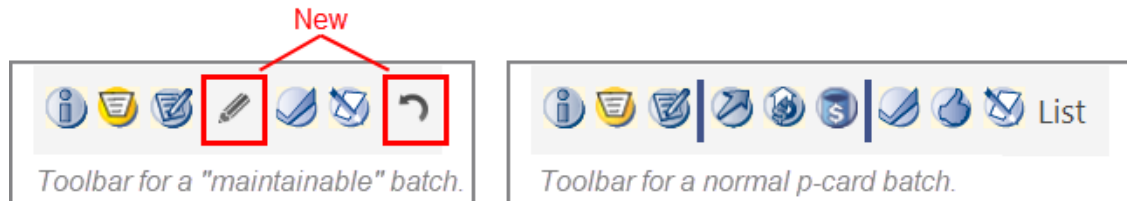
Step-by-Step: Editing Purchasing Card Batch Invoices

1. Open the Invoice Batch List page: **Financial Management > Accounts Payable > Invoice Entry Batches**.
2. Click the **Import Purchasing Card** button at the bottom of the page to launch the import wizard, and then fill in the first two pages as you normally would for a purchasing card batch import.
3. On page 3 of the wizard, do the following:
 - a. Select the **Import Invoices** check box.
 - b. Select the new **Maintain Invoices** check box. Selecting this check box makes the invoices editable.



Note: The **Maintain Invoices** check box is cleared by default. When it is cleared, the purchasing card import works exactly as it does in earlier releases of the software, importing the batch as a normal purchasing card batch.

Notice that the **toolbar** is different. In **maintain mode**, the toolbar includes two new icons: **Create Purchasing Card Import Invoice**  and **Reverse Purchasing Card** . These buttons allow you to convert an editable batch to a normal batch and reverse a purchasing card batch respectively. These functions are described in detail below.



Notice, too, that some features and functions that are available to a normal batch are not available in **maintain mode**. The **Templates**, **HR Disbursements**, **Release Contract Retainage**, and **Approvals** icons, along with the pages they open when clicked, are inaccessible in **maintain mode**. The batch must be converted from a maintainable batch to a normal batch before these features can be executed.

Also, there are typically multiple ways to open an invoice. When a batch is opened in **Maintain** mode, however, it is opened via the full invoice entry page, and all other options are **unavailable**, including **Quick Invoice**, **Temporary Invoice**, **Sales Tax Invoice**, **Select Purchase Order**, and **Select Shipper**.

7. In the Invoice Batch grid, select an invoice you would like to change by clicking on its **Invoice Number**.
8. The invoice will open via the **Invoice Batch** page. Now you can edit the invoice. Keep in mind, though, that there are limitations on what can be changed. Only the following fields can be modified:

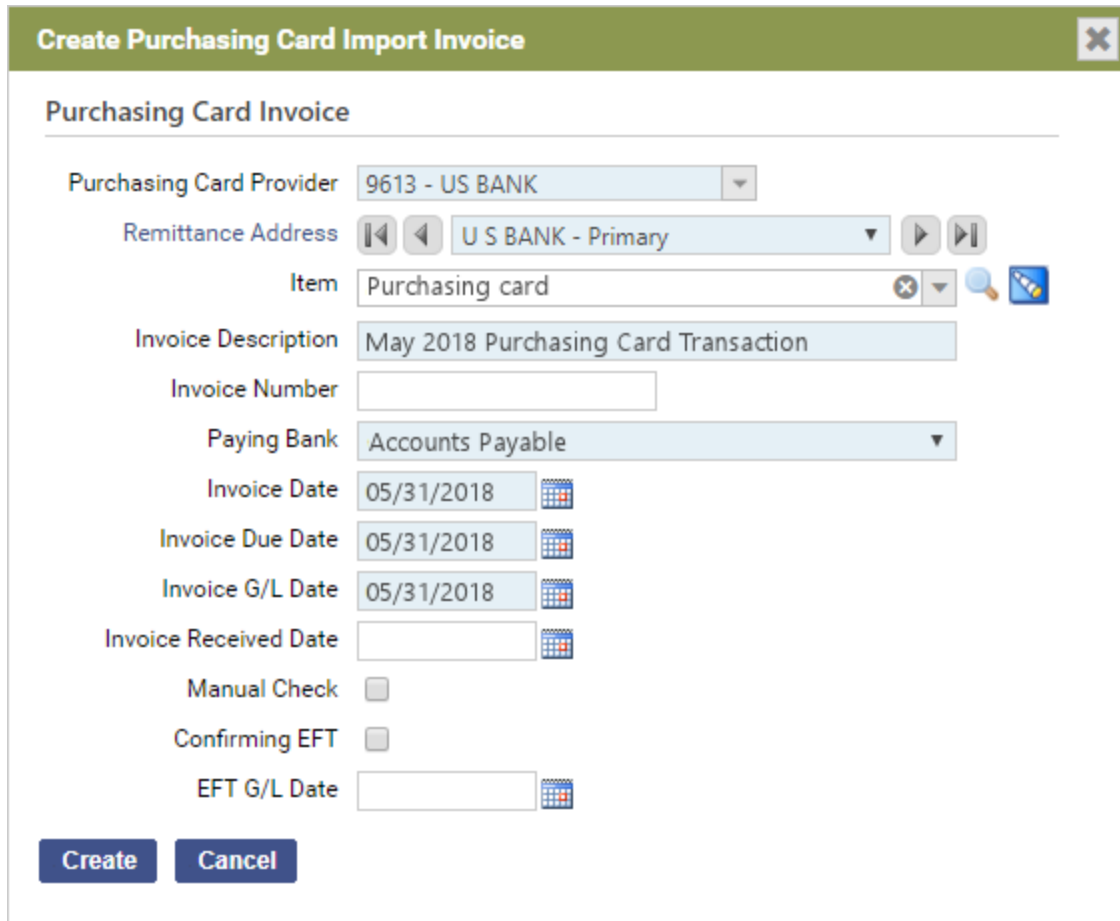
- | | |
|------------------------------|---|
| » G/L Account | » Due Date |
| » Project | » Add PO Items |
| » Vendor | » Assign Contract number (purchasing contract) |
| » Invoice Description | » Select Contract Items (commodity contracts) |
| » Item Description | » Invoice Amount |
| » Invoice Date | |

After you have made all your edits, click the **Save** button at the bottom of the page.

9. At this point, you're ready to create the purchasing card import invoice. To do this, click the  **Create Purchasing Card Import Invoice** icon.
10. The **Create Purchasing Card Import Invoice** pop-up window will open. The information in this window represents the invoice you will ultimately use to pay the purchasing card provider. Entry fields in this window are populated automatically based on values entered via the import wizard.

Review the field values and make any necessary changes.

Click **Create**.



Create Purchasing Card Import Invoice

Purchasing Card Invoice

Purchasing Card Provider: 9613 - US BANK

Remittance Address: U S BANK - Primary

Item: Purchasing card

Invoice Description: May 2018 Purchasing Card Transaction

Invoice Number:

Paying Bank: Accounts Payable

Invoice Date: 05/31/2018

Invoice Due Date: 05/31/2018

Invoice G/L Date: 05/31/2018

Invoice Received Date:

Manual Check: ☐

Confirming EFT: ☐

EFT G/L Date:

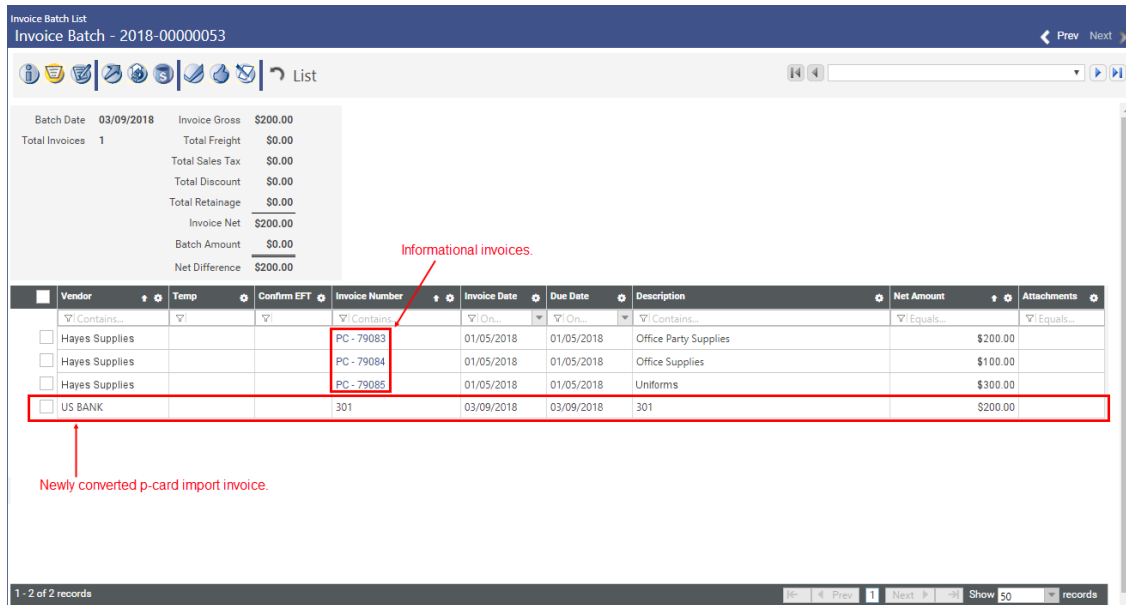
Create **Cancel**

11. The **Invoice Batch** page will reopen with your newly converted purchasing card import invoice listed in the grid.

Notice that the grid contains **two different types of invoices**: 1) the actual purchasing card import invoice, i.e., the invoice you will pay to the purchasing card provider, and 2) one or more informational invoices, which are simply records of the transactions

that make up the actual invoice. Informational invoices are just for your reference, providing information about what was purchased, from whom it was purchased, to which G/L account it was charged, etc.

Open **the newly converted purchasing card import invoice**.



Invoice Batch List
Invoice Batch - 2018-00000053

Batch Date: 03/09/2018 Invoice Gross: \$200.00
Total Invoices: 1 Total Freight: \$0.00
Total Sales Tax: \$0.00
Total Discount: \$0.00
Total Retainage: \$0.00
Invoice Net: \$200.00
Batch Amount: \$0.00
Net Difference: \$200.00

Informational invoices.

Vendor	Temp	Confirm EFT	Invoice Number	Invoice Date	Due Date	Description	Net Amount	Attachments
Hayes Supplies			PC - 79083	01/05/2018	01/05/2018	Office Party Supplies	\$200.00	
Hayes Supplies			PC - 79084	01/05/2018	01/05/2018	Office Supplies	\$100.00	
Hayes Supplies			PC - 79085	01/05/2018	01/05/2018	Uniforms	\$300.00	
US BANK			301	03/09/2018	03/09/2018	301	\$200.00	

Newly converted p-card import invoice.

1 - 2 of 2 records

- The purchasing card import invoice will open via the Invoice Batch page. At this point, the workflow icons and other functionality normally associated with this page have all been restored, because the purchasing card import invoice is no longer in **maintain mode**, but is now a normal invoice subject to normal processing.
- If on reviewing the invoice you discover an error that was made during the editing process (or a previously existing error that was missed during the editing process), you can simply "reverse" the conversion, return the invoice to its previous **maintainable state**.

To do this, simply click the **Reverse Purchasing Card**  icon.



Note: Reversing a converted purchasing card import invoice simply returns invoice to a **maintainable state**, it does **not** reverse the changes made when it was last **maintained**. Those changes are retained unless you manually change them again.

An action confirmation pop-window will appear; click **OK** to continue.

You can now make the desired changes, save them, and then repeat step 10 above, i.e., click the **Create Purchasing Card Import Invoice**  icon to convert the maintainable purchasing card batch back to a regular purchasing card batch.

General Ledger Inquiries

General Ledger Inquiries

Introduction

In New World ERP 2018.1, many enhancements have been made within the General Ledger inquiry pages. Most of these enhancements have been made within the [G/L Account Inquiry](#), [G/L Organization Inquiry](#), and [Account Inquiry](#) pages. Following is a summary of the changes that are common to all of these general ledger inquiries:

- » **User-based security.** Security can now be applied to limit inquiry search results to include only those organizations to which a selected user is authorized. For more information, see [User-Based Security](#) below.
- » **Icon touch-up.** In the search results pane of the inquiry pages, the icons that signify organizations and accounts have been replaced with “cleaner,” graphically unambiguous icons. See [Results Pane Icons](#) below.
- » **Saving searches.** The ability to save a search has been added. This allows users who typically run inquiries on the same G/L account, organization set, and/or account, to save their search criteria so that they don’t have to re-enter it for future inquiries. See [Saving Searches](#) below.
- » **Print screens.** Users can now capture print screens, i.e., printable snapshots of the information provided on a given inquiry screen. Screens can be printed or saved in PDF, which can then be printed, saved, or sent to any number of recipients via email. See [Print Screens](#) below.

Other enhancements have been made that are specific to one or another general ledger inquiry type. For example, users can now view **unposted transaction information** in the G/L Account Inquiry, G/L Organization Inquiry, and Account Inquiry pages. For a description of this and other inquiry type specific enhancements, see the following:

- » [G/L Account Inquiry](#)
- » [G/L Organization Inquiry](#)

» [Account Inquiry](#)

» [G/L Transaction Inquiry](#)

User-Based Security

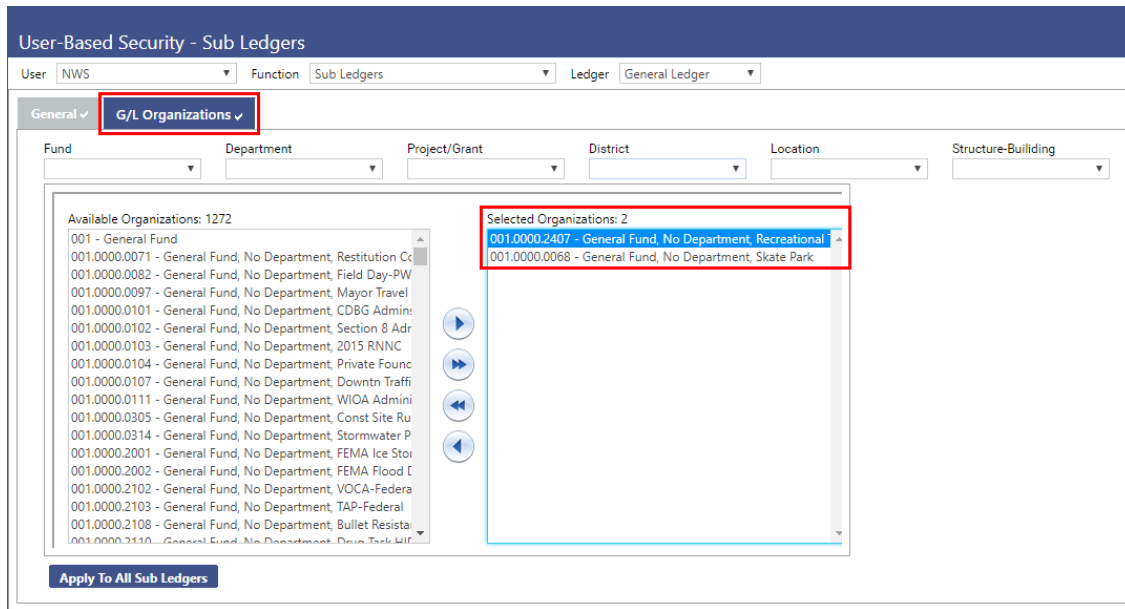
New World ERP Suite > Security > User-Based Security > Select a user > Function: Sub Ledgers > Ledger: General Ledger

New World ERP administrators can now limit general ledger inquiry search results to only those organizations for which a selected user is authorized. This is done via the User-Based Security feature in Maintenance.

After user-based security is defined for a given user, whenever the user executes a G/L Account Inquiry or Organization Inquiry, search results will always be limited to organizations to which the user is authorized. All organizations for which the user is NOT authorized will be hidden from view.

To apply user-based security, do the following:

1. Open the User-Based Security page: **New World ERP Suite > Security > User-Based Security**.
2. Click the **User** drop-down field and select the user for whom you are defining user-based security.
3. Click the **Function** drop-down field and select Sub Ledgers.
4. Click the **Ledger** drop-down field and select General Ledger.
5. Click the **G/L Organizations** tab.

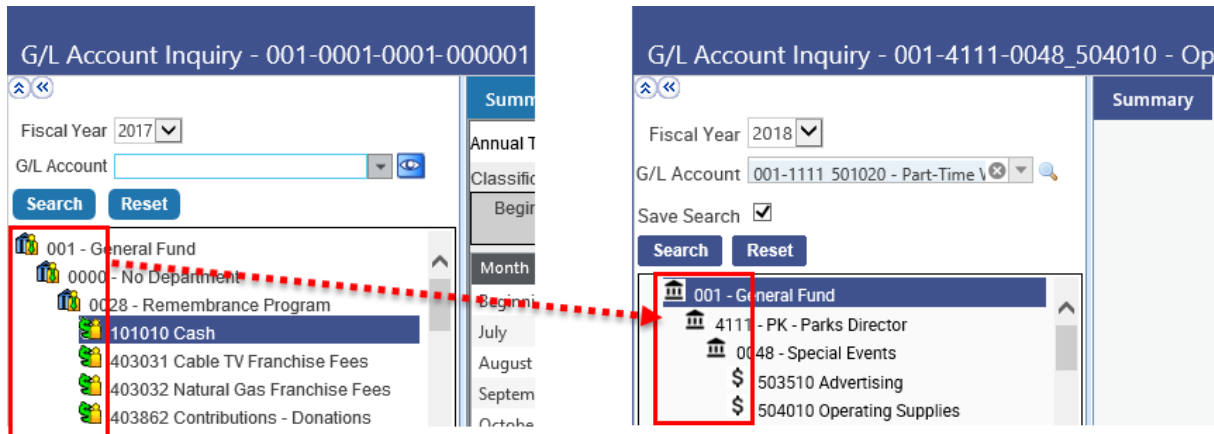


6. The user will be able to run inquiries on all the organizations listed in the **Selected Organizations** box. Move organizations into or out of this box as needed. *How do I do this? Do this by selecting an organization and clicking the appropriate arrow button. Click the right arrow to move an organization from the **Available Organizations** box to the **Selected Organizations** box, and click the left arrow to move an account from the **Selected Organizations** box to the **Available Organizations** box.*
7. Click **Save**. Going forward, when the selected user runs a G/L Account Inquiry or G/L Organization Inquiry, the search will return information for only those organizations to which he or she has been authorized. All others will be hidden from view.

Results Pane Icons

In 2018.1, the icons that represent organizations and accounts in the results pane of the G/L Account Inquiry, G/L Organization, and Account Inquiry pages have been replaced with "cleaner," graphically unambiguous icons. This makes it easier to differentiate organizations from accounts in the results pane.

In previous releases of New World ERP, organizations are represented with the  icon and accounts with the  icon. Starting in 2018.1, organizations are represented with the  icon and accounts with the  icon.

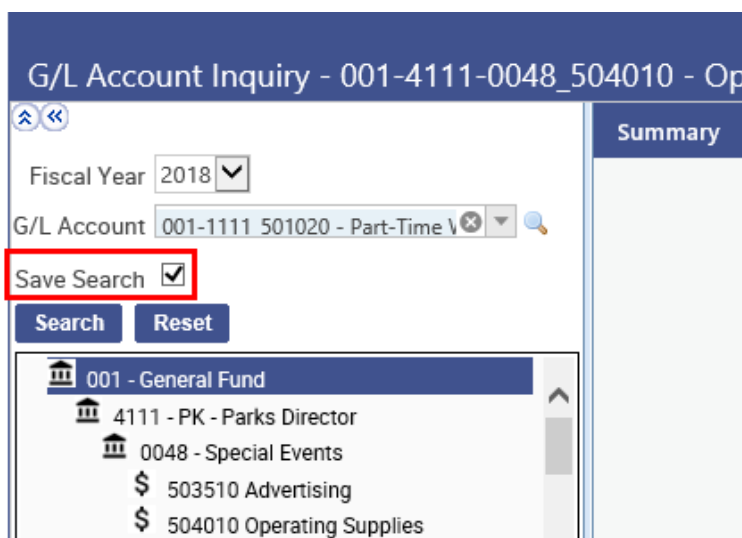
Icons in the Results pane in releases **prior** to 2018.1.Icons in the Results pane **as of** 2018.1.

Saving a Search

Financial Management > Inquiries > General Ledger > G/L Account Inquiry or G/L Organization Inquiry or Account Inquiry pages

The **Save Search** check box has been added to the search criteria pane on the G/L Account Inquiry, G/L Organization Inquiry, and Account Inquiry pages (see example below). Selecting this check box allows you to save your current search, i.e., the values you entered in the search criteria fields.

After you enter your search criteria, select the **Save Search** check box, and execute a search, the system will retain the search criteria values. As long as the **Save Search** check box is selected, whenever you return to the inquiry page, the search criteria will auto-populate and the results pane will refresh to display the appropriate search results.



Search criteria differs slightly by inquiry type. Following is a list of values that are saved per inquiry type:

- » G/L Account Inquiry: **Fiscal Year** and **G/L Account**
- » G/L Organization Inquiry: **Fiscal Year** and **Organization Set**
- » Account Inquiry: **Fiscal Year**, **Account Type**, and **Account**

Print Screens

Users can now capture a print screen, i.e., a printable snapshot of the information provided on a given inquiry page, anywhere within the G/L Account Inquiry, Organization Inquiry, and Account Inquiry pages.

Executing a Print Screen

Print screens are captured via the new **Print Screen**  button, which has been added to the pages mentioned above.

Clicking **Print Screen**  captures the information displayed on the *currently active* page, tab, or window, and allows you to either print the information or generate a PDF of the content, which can then be saved, printed, and/or sent to any number of recipients via email.

As an example, the screen shot below shows the **Print Screen**  button for the G/L Account Inquiry page. The **Summary** tab is active, so clicking **Print Screen**  here will capture all the content listed in the **Summary** tab only. Again, only information in the *active* page or tab will be captured.

See below for additional information on how to include hidden information in your print screens, as well as a few words on how the browser you use will affect print screen behavior.

Summary

Budget Analysis

Five Year Trend

Budget History

Detail

Print Screen

Annual Totals

YTD

Reclass Journal Type

Classification

Personnel

Fiscal Year 2018

	YTD Balance	Percent Used	Amended Budget	Encumbrances	Expenses
	\$37,382.66	21%	\$47,614.00	\$0.00	\$10,231.34

Month	Budget	Amendments	Encumbrances	Expenses
July	\$47,614.00	\$0.00	\$0.00	\$2,923.25
August	\$0.00	\$0.00	\$0.00	\$3,654.04
September	\$0.00	\$0.00	\$0.00	\$3,654.05
October	\$0.00	\$0.00	\$0.00	\$0.00
November	\$0.00	\$0.00	\$0.00	\$0.00
December	\$0.00	\$0.00	\$0.00	\$0.00
January	\$0.00	\$0.00	\$0.00	\$0.00
February	\$0.00	\$0.00	\$0.00	\$0.00
March	\$0.00	\$0.00	\$0.00	\$0.00
April	\$0.00	\$0.00	\$0.00	\$0.00
May	\$0.00	\$0.00	\$0.00	\$0.00
June	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$47,614.00	\$0.00	\$0.00	\$10,231.34
Unposted Transactions	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total	\$47,614.00	\$0.00	\$0.00	\$10,231.34

Including Hidden Information in Your Screen Print

It is important to remember that, depending on which inquiry page or tab you have open when doing a print screen, information that defaults as **collapsed** or **hidden from view** may or may not be automatically included in the print-out or PDF.

Some screens provide additional information through expandable areas, such as tables with rows that default as collapsed but can be expanded, or detail that displays only when a specific button is clicked. For example, the **Budget Analysis** tab (shown below) displays an **Unposted Transactions** amount and includes a “**(Details)**” hotspot that, when clicked, displays additional information.

In most cases, to include this type of hidden information in your print screen, you must display the information before clicking the **Print Screen**  button. Otherwise that information will not be included in the print-out or PDF.

The G/L Account Inquiry page’s **Budget History** and **Detail** tabs are exceptions to the rule. Both of these tabs include collapsed information, but the collapsed information is *automatically* expanded for print screens.

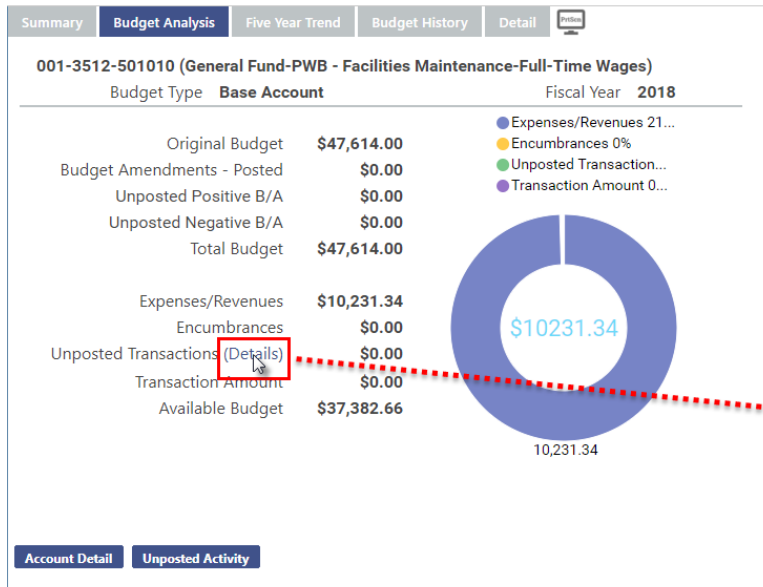


Figure 1

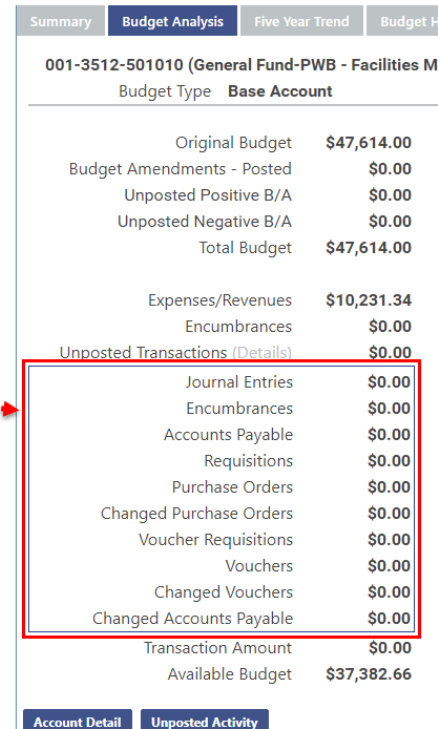


Figure 2

When the **Unposted Transactions Details** hotspot is clicked (Figure 1), additional related information displays below the Unposted Transactions line (Figure 2). To include this information in a screen shot it must be displayed on the screen before clicking the **Print Screen** button.

Print Screens and Browser Considerations

The Print Screen feature works with all major browsers (i.e., Google Chrome, Microsoft Internet Explorer (IE), Firefox, and Safari). However, Tyler recommends using Google Chrome because Chrome offers useful preview and print functionality that the other browsers do not provide.

For example, if you use Chrome, clicking the  button while in the G/L Account Inquiry **Summary** tab opens the page shown below. This page displays a preview of the screen content, showing you how it will look when printed. Fields on the left-hand side of the screen give you a number of options for displaying and printing the captured screen content.

Preview mode also allows you to see where page breaks will occur and, if they are misplaced, cancel out of the printing so you can return to the software to modify the page break settings.

Print

Total: 1 sheet of paper

Print **Cancel**

Destination  4-N-HP4015 on TroPVP...

Change...

Pages ☒ All

☐ e.g. 1-5, 8, 11-13

Copies

Layout Portrait

Color Black and white

Paper size Letter

Margins Default

Scale

Options

☒ Headers and footers

☒ Two-sided

☒ Background graphics

[Fewer settings](#)

[Print using system dialog... \(Ctrl+Shift+P\)](#)

3/30/2018 G/L Account: 002-1041-504410 (General Fund-Golf -Parks and Rec-Concession Items)

Annual Totals YTD Reclass Journal Type

Classification Supplies Fiscal Year 2018

Percent Used	Amended Budget	Encumbrances	Expenses	YTD Balance
----	\$0.00	\$0.00	\$0.00	\$0.00

Month	Budget	Amendments	Encumbrances	Expenses	Current YTD Balance
July	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
August	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
September	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
October	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
November	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
December	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
January	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
February	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
March	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
April	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
May	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
June	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Unposted Transactions	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

https://trovmlogosint.corp.tyler technologies.com/Logos/FinancialManagement/GLAccounts/GLInquiry.aspx?fromcrumb=0

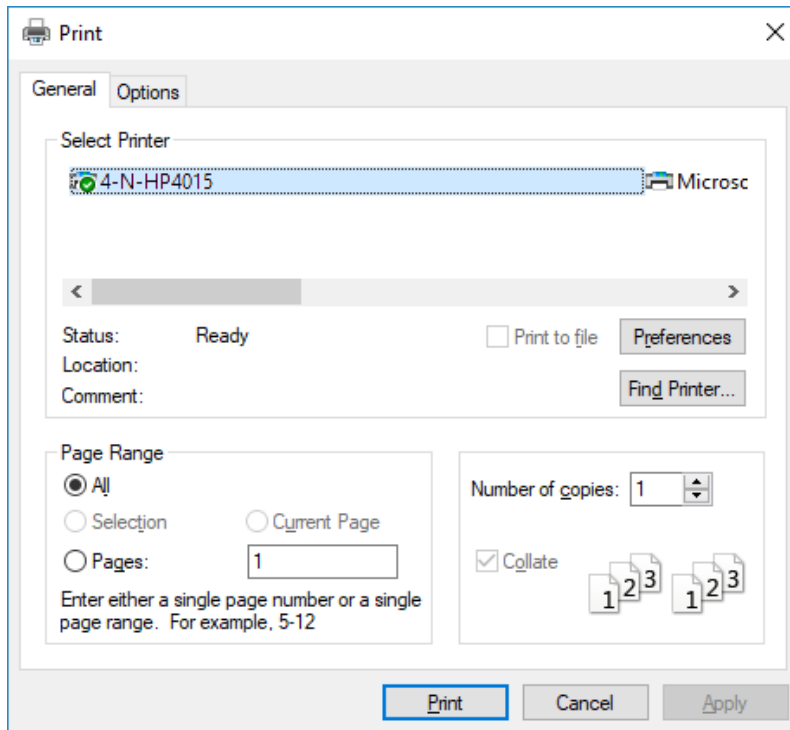
1/1

You can print to a printer or to PDF. To print to PDF, click **Change and then select the PDF option.**

The Headers and footers check box must be checked to include the G/L Account Number at the top of the page.

Select the Background graphics check box to display background graphics and coloring, such as that used in alternating rows in some tables.

By comparison, if you use Firefox or Microsoft Internet Explorer and click  in the **Summary** tab (or anywhere else the  button is available), the Print dialog box will open (see below). This dialog box provides no preview options.



G/L Account Inquiry

Financial Management > Inquiries > General Ledger > G/L Accounts

Multiple enhancements have been made to the G/L Account Inquiry page. Some of these enhancements are common to other inquiry pages and tabs, as well. Others are specific to the G/L Account Inquiry page.

For those enhancements that are common to all inquiries, see the [Introduction](#) at the top of this page.

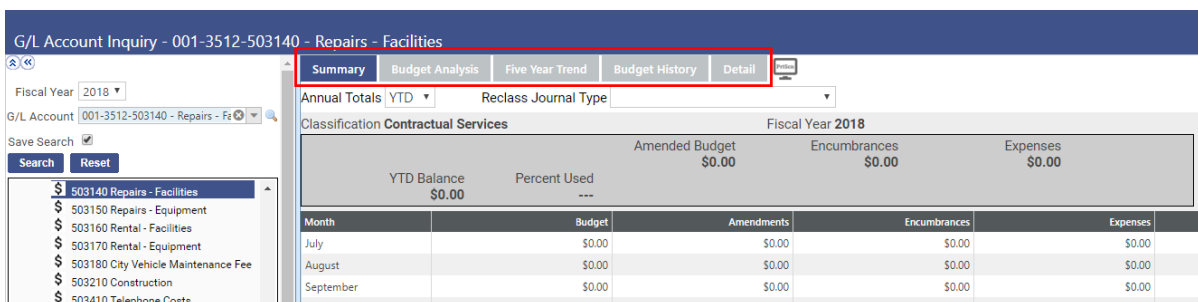
Enhancements specific to the G/L Account Inquiry page include the following:

- » **Tab order.** Tabs in the G/L Account Inquiry page have been reordered to display in the order of most often used. The new order is Summary, Budget Analysis, Five Year Trend, Budget History, and Detail. See [Tabs Reordered for User Convenience](#).
- » The **Summary** tab grid has been enhanced with the addition of two new rows, the **Unposted Transactions** and **Grand Total** rows. See [Summary tab](#).
- » The manner in which information and graphical charts are presented in the **Budget Analysis** tab has been updated with a “cleaner,” more modern look. See [Budget Analysis tab](#).

- » The **Budget History** tab's **History Type** field has been enhanced to default to Transactions by Budget Level instead of Amounts by Budget Level. See [Budget History tab](#).

Tabs Reordered for User Convenience

The tabs on the G/L Account Inquiry page have been reordered based on user feedback about preferred tab sequence. As a result, the **Budget Analysis** tab, which was previously the last tab in the row of tabs, is now in the second position, and the **Detail** tab has been moved to the last position.



G/L Account Inquiry - 001-3512-503140 - Repairs - Facilities

Fiscal Year: 2018
G/L Account: 001-3512-503140 - Repairs - Facilities

Save Search

Classification: Contractual Services

Annual Totals: YTD
Reclass Journal Type:
Fiscal Year: 2018

YTD Balance		Amended Budget	Encumbrances	Expenses
\$0.00	Percent Used	\$0.00	\$0.00	\$0.00

Month	Budget	Amendments	Encumbrances	Expenses
July	\$0.00	\$0.00	\$0.00	\$0.00
August	\$0.00	\$0.00	\$0.00	\$0.00
September	\$0.00	\$0.00	\$0.00	\$0.00

Summary Tab

Financial Management > Inquiries > General Ledger > G/L Accounts > Summary tab

Since users need to view unposted transactions along with general ledger balances to properly analyze remaining balances, the **Summary** tab has been enhanced with the addition of two grid rows: **Unposted Transactions** and **Grand Total**.

The **Unposted Transactions** row shows the sum of unposted expenses for Amendments, Encumbrances, and Expenses.

- » For Expense accounts:
 - » The **Unposted Transactions** amount for the **Amendments** column includes the sum of the following fields from the **Budget Analysis** tab: **Unposted Positive BA** and **Unposted Negative BA**.
 - » The **Unposted Transactions** amount for the **Encumbrances** column includes the sum of the following fields from the **Budget Analysis** tab: **Encumbrances**, **Accounts Payable - EA**, **Requisitions**, **Purchase Orders**, **Changed Purchase Orders**, **Voucher Requisitions**, **Vouchers**, and **Changed Vouchers**.
 - » The **Unposted Transactions** amount for the **Expenses** column includes the sum of the following fields from the **Budget Analysis** tab: **Journal Entries**, **Accounts Payable - JE**, and **Changed Accounts Payable**.

» For Revenue accounts:

- » The **Unposted Transactions** amount for the **Amendments** column includes the sum of the following fields from the **Budget Analysis** tab: **Unposted Positive BA** and **Unposted Negative BA**
- » The **Unposted Transactions** amount for the **Revenues** column includes the sum of the following field from the **Budget Analysis** tab: **Journal Entries, Accounts Payable - JE, and Changed Accounts Payable.**

For each column, the **Grand Total** row represents the total plus any unposted transactions.

Summary

Budget Analysis

Five Year Trend

Budget History

Detail

Print

Annual Totals

YTD

Reclass Journal Type

Classification

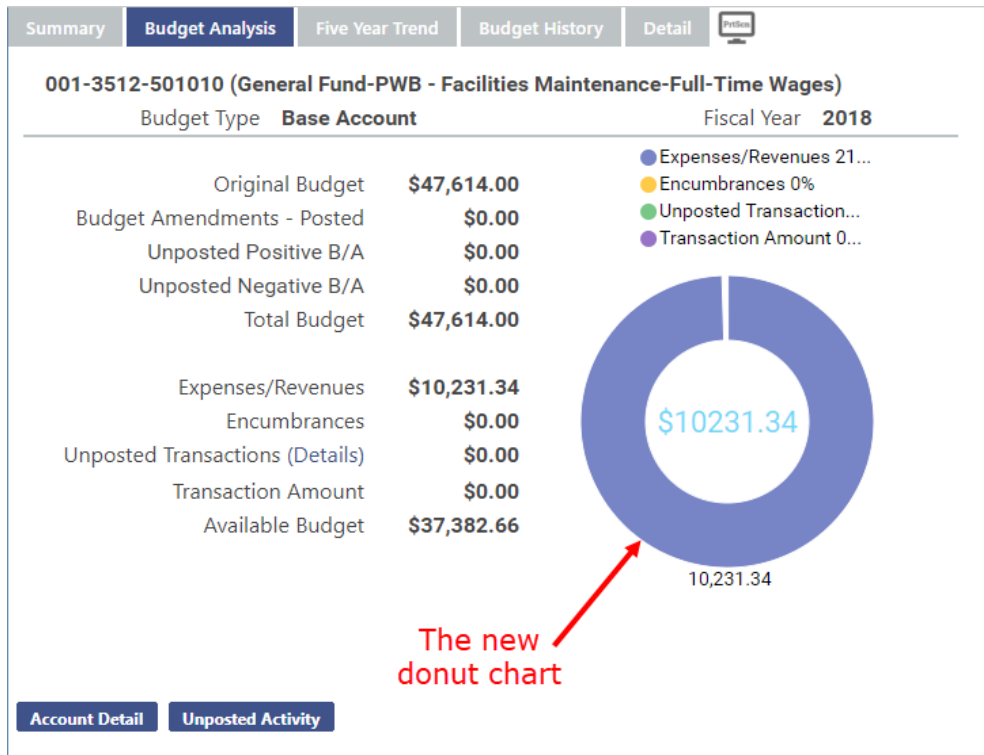
Contractual Services

Fiscal Year 2018

YTD Balance \$0.00		Percent Used ---	Amended Budget \$0.00	Encumbrances \$0.00	Expenses \$0.00
Month	Budget	Amendments	Encumbrances	Expenses	
July	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
August	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
September	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
October	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
November	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
December	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
January	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
February	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
March	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
April	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
May	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
June	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Unposted Transactions	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Budget Analysis Tab

The bar graph and supporting information that appeared in the **Budget Analysis** tab in previous releases of New World ERP has been replaced with the doughnut graph and supporting data as shown below.



Budget History Tab

In previous releases, the **History Type** field defaults to Amounts by Budget Level. In response to client preferences, this field has been enhanced to default to Transactions by Budget Level.

Summary | Budget Analysis | Five Year Trend | **Budget History** | Detail 

History Type **Transactions by Budget Level** Chart By **Account**   0   0

001-3512-501010 (General Fund-PWB - Facilities Maintenance-Full-Time Wages)

Classification **Personnel**

Level	Transactions	Transaction Total Amount
▽ Contains...	▽ Equals...	▽ Equals...
+ Recommended	1	\$47,614.00
+ Approved	1	\$47,614.00

G/L Organization Inquiry

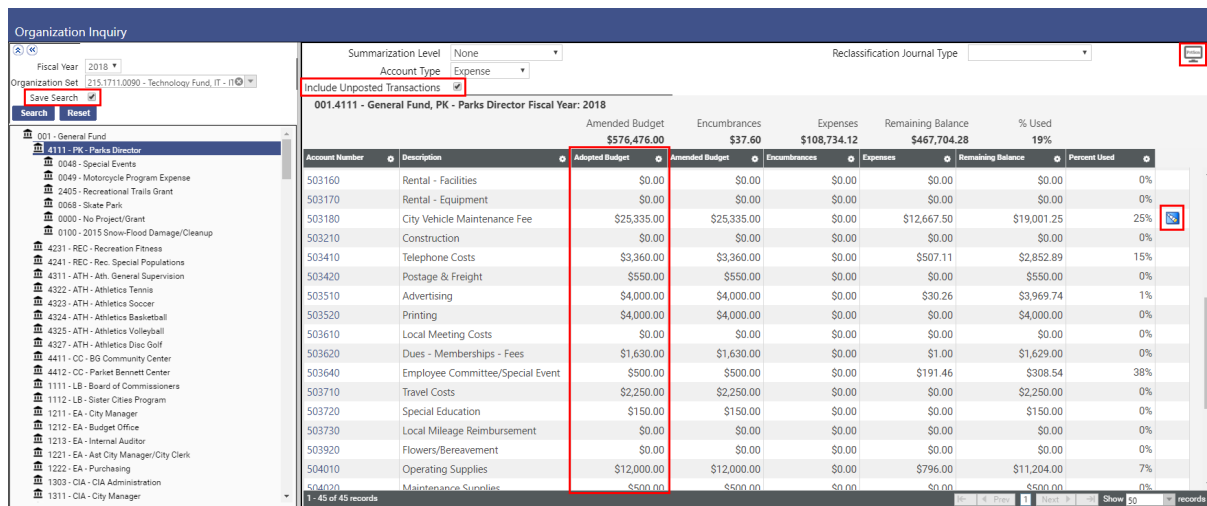
Financial Management > Inquiries > General Ledger > G/L Organizations

Multiple enhancements have been made to the G/L Organization Inquiry page. Some of these enhancements are common to other inquiry pages and tabs, as well. Others are specific to the G/L Organization Inquiry page.

For those enhancements that are common to all inquiries, see the [Introduction](#) at the top of this page.

Enhancements specific to the G/L Organization Inquiry page include the following:

- » **Unposted transactions.** Users now have the option of including unposted transactions in the inquiry grid. The **Include Unposted Transactions** check box has been added to the upper left-hand corner of the results window (see screen shot below). Selecting this check box will refresh the inquiry results grid to include all unposted transactions that fit the user-defined inquiry criteria. Clearing the check box will remove all unposted transactions from the grid.
- » Unposted transactions are flagged with the **View Unposted**  button to make them easy to locate and identify. Clicking this button opens the Budget Analysis pop-up window where you can view the unposted activity for the selected G/L account.
- » The **Adopted Budget** column has been added to the grid for informational purposes.



The screenshot shows the 'Organization Inquiry' window for the 'General Fund, PK - Parks Director Fiscal Year: 2018'. The 'Include Unposted Transactions' checkbox is checked. The table displays various accounts with columns for Adopted Budget, Amended Budget, Encumbrances, Expenses, Remaining Balance, and Percent Used. A 'View Unposted' button is visible next to account 503180.

Account Number	Description	Adopted Budget	Amended Budget	Encumbrances	Expenses	Remaining Balance	Percent Used
503160	Rental - Facilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
503170	Rental - Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
503180	City Vehicle Maintenance Fee	\$25,335.00	\$25,335.00	\$0.00	\$12,667.50	\$19,001.25	25%
503210	Construction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
503410	Telephone Costs	\$3,360.00	\$3,360.00	\$0.00	\$507.11	\$2,852.89	15%
503420	Postage & Freight	\$550.00	\$550.00	\$0.00	\$0.00	\$550.00	0%
503510	Advertising	\$4,000.00	\$4,000.00	\$0.00	\$30.26	\$3,969.74	1%
503520	Printing	\$4,000.00	\$4,000.00	\$0.00	\$0.00	\$4,000.00	0%
503610	Local Meeting Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
503620	Dues - Memberships - Fees	\$1,630.00	\$1,630.00	\$0.00	\$1.00	\$1,629.00	0%
503640	Employee Committee/Special Event	\$500.00	\$500.00	\$0.00	\$191.46	\$308.54	38%
503710	Travel Costs	\$2,250.00	\$2,250.00	\$0.00	\$0.00	\$2,250.00	0%
503720	Special Education	\$150.00	\$150.00	\$0.00	\$0.00	\$150.00	0%
503730	Local Mileage Reimbursement	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
503920	Flowers/Bereavement	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
504010	Operating Supplies	\$12,000.00	\$12,000.00	\$0.00	\$796.00	\$11,204.00	7%
504020	Maintenance Supplies	\$500.00	\$500.00	\$0.00	\$0.00	\$500.00	0%

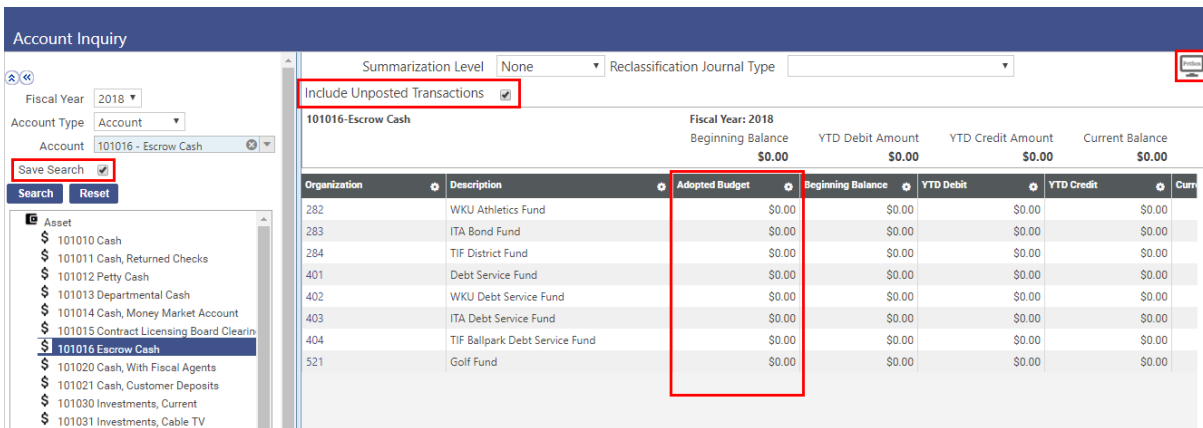
Account Inquiry

Financial Management > Inquiries > General Ledger > Accounts

Multiple enhancements have been made to the Account Inquiry page. Some of these enhancements are common to other inquiry pages and tabs, as well. Others are specific to the Account Inquiry page.

For those enhancements that are common to all inquiries, see the [Introduction](#) at the top of this page. Enhancements specific to the Account Inquiry page include the following:

- » **Unposted transactions.** Users now have the option of including unposted transactions in the inquiry grid. The **Include Unposted Transactions** check box has been added to the upper left-hand corner of the results window (see screen shot below). Selecting this check box will refresh the inquiry results grid to include all unposted transactions that fit the user-defined inquiry criteria. Clearing the check box will remove all unposted transactions from the grid.
- » Unposted transactions are flagged with the **View Unposted**  button to make them easy to locate and identify. Clicking this button opens the Budget Analysis pop-up window where you can view the unposted activity for the selected account.
- » The **Adopted Budget** column has been added to the grid for informational purposes.



The screenshot shows the 'Account Inquiry' interface. On the left, there are filters for Fiscal Year (2018), Account Type (Account), and Account (101016 - Escrow Cash). A 'Save Search' button is highlighted with a red box. In the top right corner, a 'Print' button is also highlighted with a red box. The main results grid has a header for 'Fiscal Year: 2018' with columns for Beginning Balance, YTD Debit Amount, YTD Credit Amount, and Current Balance. Below this, a table lists various funds with a new 'Adopted Budget' column highlighted by a red box. The table data is as follows:

Organization	Description	Adopted Budget	Beginning Balance	YTD Debit	YTD Credit	Current Balance
282	WKU Athletics Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
283	ITA Bond Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
284	TIF District Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
401	Debt Service Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
402	WKU Debt Service Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
403	ITA Debt Service Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
404	TIF Ballpark Debt Service Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
521	Golf Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

G/L Transaction Inquiry & the Purchase Order Pop-Up Window

Financial Management > Inquiries > General Ledger > G/L Transactions

This feature is only available when the Summarization Level is set to None.

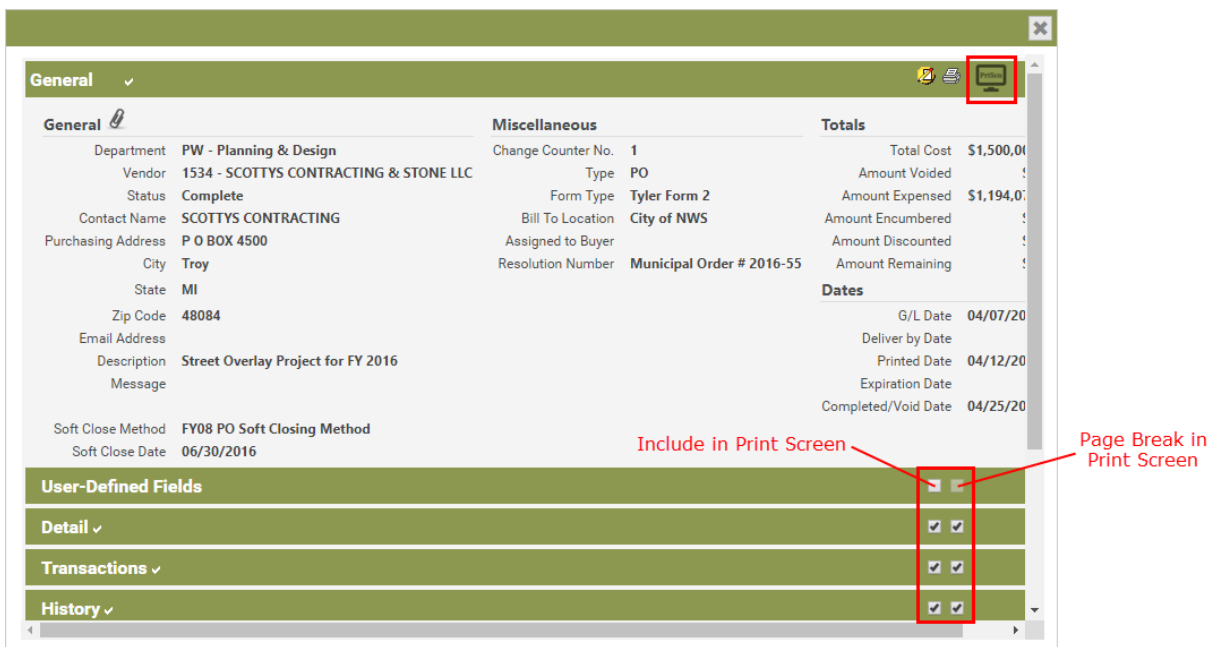
The Purchase Order pop-up window, accessed via the G/L Transaction Inquiry page, has been enhanced with new **print screen** functionality. The print screen  icon has been added to the upper right-hand corner of the pop-up window. Clicking it allows users to print the PO information as displayed in the pop-up.

Since PO information within the pop-up is presented in sections of related informational categories, users have the ability to print all sections or selected sections only. Every section title bar includes a set of check boxes (see image below). Selecting the **Include in Print Screen** check box will include that section in the printout or PDF. Clearing this check box will exclude the section from the print out or PDF.



Note: The **General** section will always print. It cannot be excluded from the printout/PDF.

Selecting the **Page Break in Print Screen** check box for a given section will insert a page break before the beginning of the section in the print out. This allows you to start each selected section at the top of a new page in the print out or PDF.



The screenshot shows the Purchase Order pop-up window. The **General** section is expanded, showing various fields like Department, Vendor, Status, Contact Name, Purchasing Address, City, State, Zip Code, Email Address, Description, Message, Soft Close Method, and Soft Close Date. The **Miscellaneous** section shows Change Counter No., Type, Form Type, Bill To Location, Assigned to Buyer, and Resolution Number. The **Totals** section shows Total Cost, Amount Voided, Amount Expensed, Amount Encumbered, Amount Discounted, and Amount Remaining. The **Dates** section shows G/L Date, Deliver by Date, Printed Date, Expiration Date, and Completed/Void Date. At the bottom, there are sections for User-Defined Fields, Detail, Transactions, and History. Each section title bar has two checkboxes: 'Include in Print Screen' and 'Page Break in Print Screen'. Red arrows point to these checkboxes, indicating they are checked.



Note: Some sections have collapsed information. When printed, all information is included in the printout, including information that typically appears in collapsed rows, etc.

Human Resources

eEmployee

Accrual Information Enhancement

My HR > Accrual Information

The **Accrual Information** page has been enhanced with expandable rows to show the details behind accrual hours balances.

eSuite HR Portal
Powered by Tyler Technologies

HOME MY HR **TIMESHEET** BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

» Accrual Information
» Contacts/Dependents
» Deductions
» Direct Deposits
» Personal Information
» Positions & Pay Rate
» Taxes
» Tax Requests
» Paychecks
» Print W-2 Forms
» Print 1095-C Forms
» Print 1099-R Forms
» Upload Documents

Welcome to the HR Portal

eSuite HR Portal
Powered by Tyler Technologies

HOME MY HR **TIMESHEET** BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Welcome, Lizbeth K Ovellette!

Home > My HR > Accrual Information
<https://logosint suite.com/tylertechologies.com/websites/hr.portal/default.aspx>

Accrual Information

Choose a year: 2018

Hour Category	Starting Balance	Hours Earned	Hours Taken	Ending Balance	Days
Appreciation	0.0000	0.0000	0.0000	0.0000	0.00
Comp Time	0.0000	0.0000	0.0000	0.0000	0.00
Vacation	178.0000	10.0000	0.0000	188.0000	23.50
	Work Date	Day	Hours Earned	Hours Taken	
	1/22/2018	Monday	10.0000		
	1/19/2018	Friday	10.0000		
Personal	0.0000	0.0000	0.0000	0.0000	0.00
Sick	244.5000	0.0000	0.0000	244.5000	30.56

An expansion triangle  displays on the left side of each row. Clicking a triangle expands the row. An expanded row contains work dates, days of the week, hours earned and hours taken, making it easy for employees to reconcile each accrual hours category. Data is sorted by work date, from latest to earliest.

Future time off requested also has been added to the page. Dates are highlighted in red.



Hour Category	Starting Balance	Hours Earned	Hours Taken	Ending Balance	Days
Vacation	38.0000	16.8000	0.0000	54.8000	4.57
Work Date	Day	Hours Earned	Hours Taken		
5/29/2018	Tuesday		12.0000		
5/25/2018	Friday		12.0000		
2/15/2018	Thursday	8.4000			
1/15/2018	Monday	8.4000			
Sick	139.8300	16.8000	22.0000	134.6300	11.22

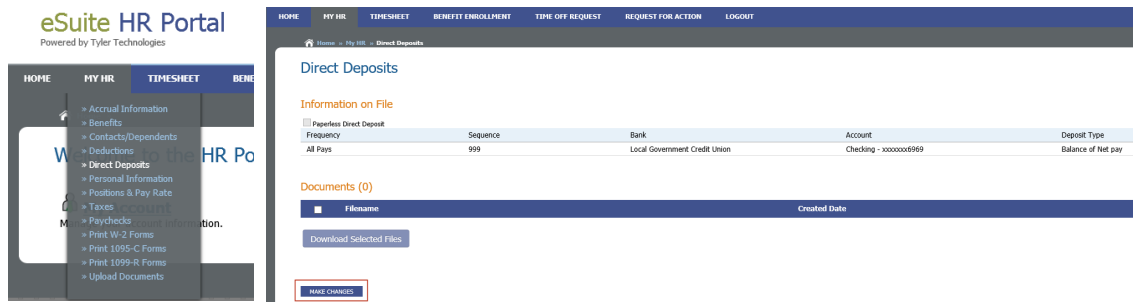
Direct Deposit Upload Check

MY HR > Direct Deposits

A document upload feature has been added to eDirect Deposits to let employees attach direct deposit slips or voided checks to direct deposit change requests. The steps below show you how to use this feature to upload a voided check:

Upload check from eEmployee

1. Log in to the HR Portal.
2. Navigate to MY HR > **Direct Deposits**. The **Direct Deposits page** will open. Voided checks that may have been uploaded with previous direct deposit change requests will show in the **Documents** grid at the bottom of the page.



eSuite HR Portal
Powered by Tyler Technologies

HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home > My HR > Direct Deposits

Direct Deposits

Information on File

☐ Paperless Direct Deposit

Frequency	Sequence	Bank	Account	Deposit Type
All Pays	999	Local Government Credit Union	Checking - xxxxxxxx6969	Balance of Net pay

Documents (0)

Filename	Created Date

Download Selected Files

MAKE CHANGES

3. Click the **MAKE CHANGES** button. The **Direct Deposit Change Form** will open.

HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home » My HR » Direct Deposits » Direct Deposit

Direct Deposit - Change Form

☐ Paperless Direct Deposit
☐ Disable Direct Deposit

DELETE X			
BANK	Local Government Credit Union - 253184537	ACCOUNT TYPE	Checking
Sequence	999	ACCOUNT #	06600996966
Amount Type/Amount	Amount	\$100.00	FREQUENCY All - All Pays

ADD A DISTRIBUTION	
BANK	APPLE BANK - 226070584

ADD DISTRIBUTION

Documents (0)

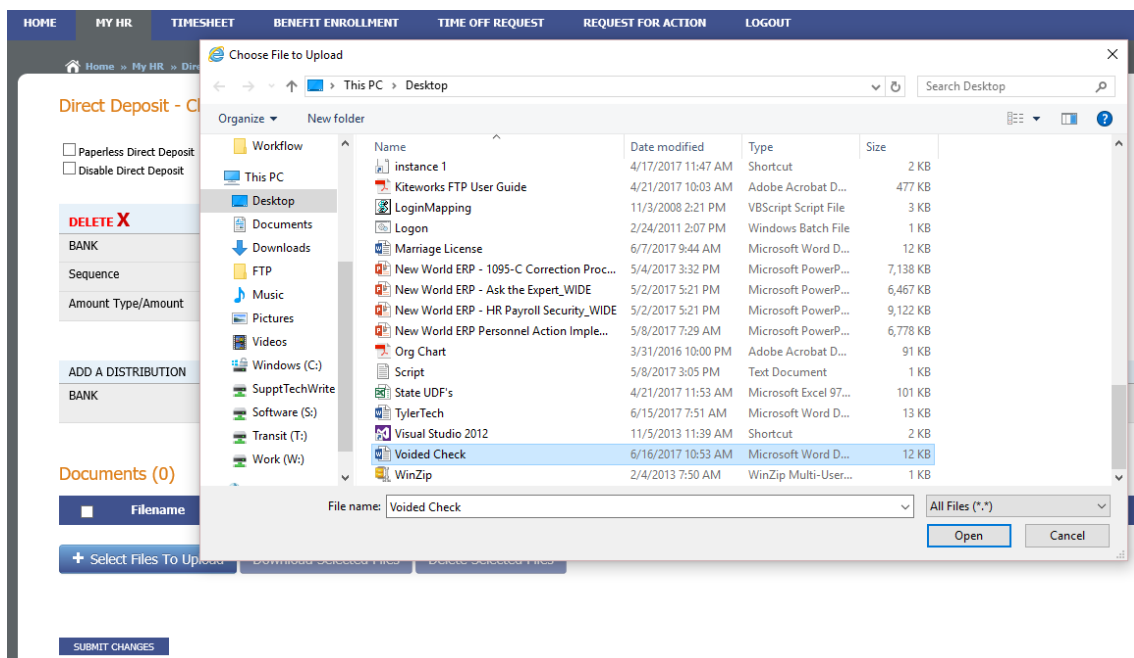
Filename	Created Date
----------	--------------

+ Select Files To Upload Download Selected Files Delete Selected Files

SUBMIT CHANGES

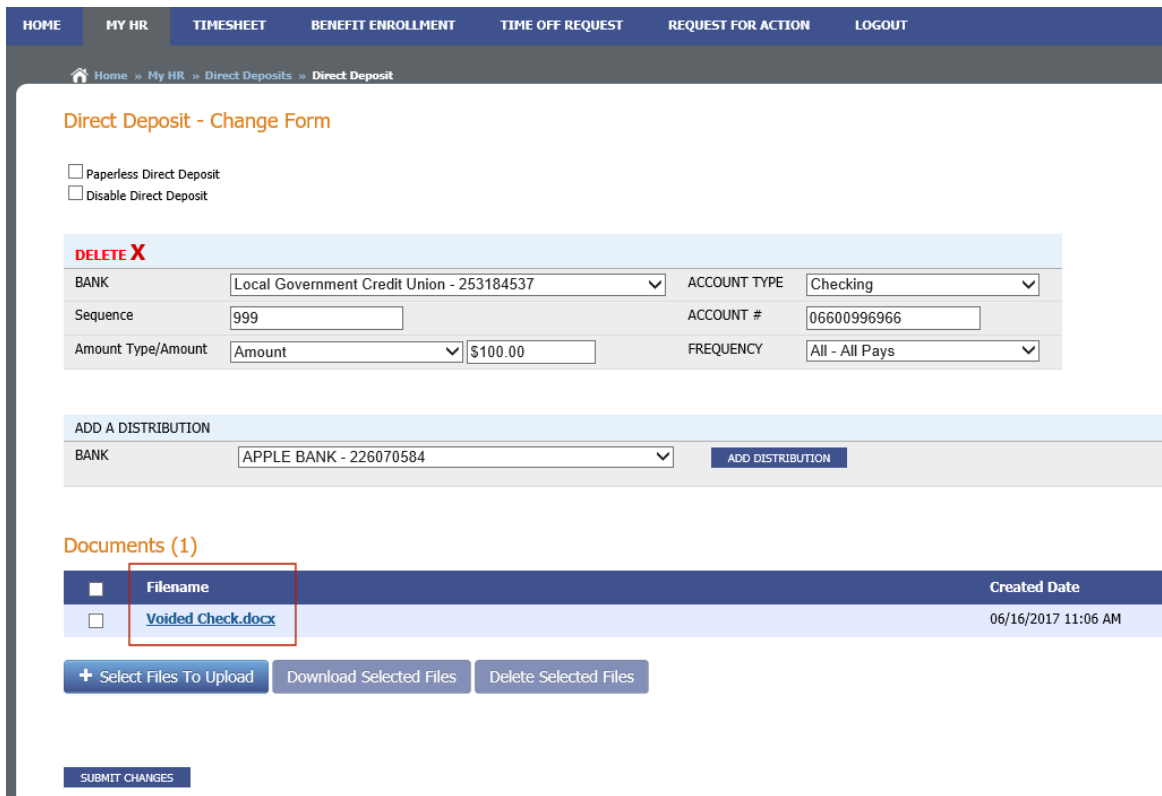
4. Make the necessary changes on the form.

5. Click the **Select Files to Upload** button. The **Choose File to Upload** dialog will open.



6. Select the voided check file.

- Click the **Open** button. The file will be added to the **Documents grid** on the Direct Deposit Change Form.



Direct Deposit - Change Form

☐ Paperless Direct Deposit
☐ Disable Direct Deposit

DELETE X

BANK	Local Government Credit Union - 253184537	ACCOUNT TYPE	Checking	
Sequence	999	ACCOUNT #	06600996966	
Amount Type/Amount	Amount	\$100.00	FREQUENCY	All - All Pays

ADD A DISTRIBUTION

BANK	APPLE BANK - 226070584	ADD DISTRIBUTION
------	------------------------	-------------------------

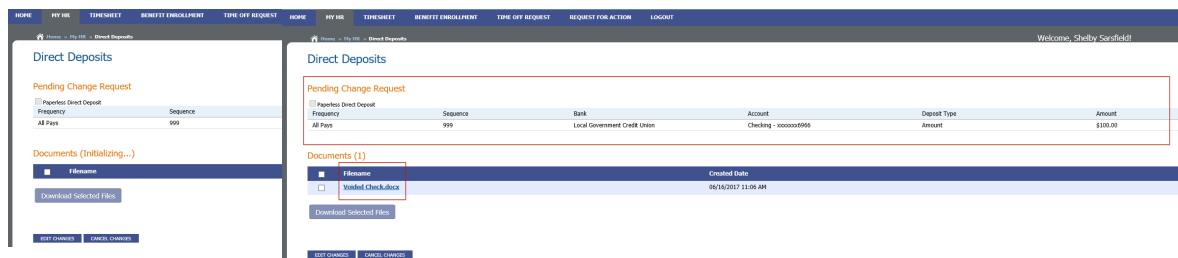
Documents (1)

Filename	Created Date
Voiled Check.docx	06/16/2017 11:06 AM

+ Select Files To Upload **Download Selected Files** **Delete Selected Files**

SUBMIT CHANGES

- Click the **SUBMIT CHANGES** button. The document will be **initialized** and added to the **Documents** grid at the bottom of the **Direct Deposits** page. The submitted changes will show in the **Pending Change Request** grid at the top of the page.



Direct Deposits

Pending Change Request

Sequence	Bank	Account	Deposit Type	Amount
999	Local Government Credit Union	Checking - 000000996	Amount	\$100.00

Documents (1)

Filename	Created Date
Voiled Check.docx	06/16/2017 11:06 AM

Download Selected Files

EDIT CHANGES **CANCEL CHANGES**

Approve and post change request in new world ERP

- Log in to new world ERP.
- Navigate to Human Resources > eSuite > Employee Change Request. The Employee Change Requests page will open.



Note: To let you refresh the grid of change requests so that it contains those for documents only, **Employee Upload Documents** has been added as a *Request Type* in the search panel (click *Show Search* link) at the top of the page.

Request Type	
Status	Employee Address
	Employee Contacts
	Employee Contacts And Dependents
	Employee Date Of Birth
	Employee Direct Deposit
	Employee Email
	Employee Name
	Employee Phone Number
	Employee Physical Address
	Employee Upload Documents
Pending	05/31/2017

3. Click the **Employee name** in the row representing the change request.

Employee Change Requests								
myTasks	Approvals	Department	Employee	Request Type	Request Date	Status	Status Date	Attachments
✓	0 of 1 at 1	60_73 - Parks & Recreational Services...	Babauta, Frank - 2801	Employee Direct Deposit	06/01/2017	Pending	06/01/2017	
✓	0 of 1 at 1	60_73 - Parks & Recreational Services...	Bellefleur, Gino Sandy - 2596	Employee Contacts An...	05/31/2017	Pending	05/31/2017	
✓	0 of 1 at 1	60_73 - Parks & Recreational Services...	Brasch, Dane - 1106	Employee Name	06/15/2017	Pending	06/15/2017	
✓	0 of 1 at 1	60_73 - Parks & Recreational Services...	Brasch, Dane - 1106	Employee Address	06/15/2017	Pending	06/15/2017	
✓	0 of 1 at 1	60_73 - Parks & Recreational Services...	Caulk, Annette M - 2850	Employee Upload Docu...	06/16/2017	Pending	06/16/2017	
✓	0 of 1 at 1	52_40 - Fire Protection Operations	Chand, Nancy S - 1985	Employee Direct Deposit	06/02/2017	Pending	06/02/2017	
✓	0 of 1 at 1	60_73 - Parks & Recreational Services...	Sarsfield, Shelby - 2461	Employee Direct Deposit	06/16/2017	Pending	06/16/2017	

Refresh

The **Employee Change Request-Approval page** will open, containing two tabs, **General** and **Approvals**. The grid on the **General** tab will show the requested changes in red, and the background of the **Documents** icon in the *Attachments* column will be yellow to indicate an attachment exists. (If an attachment does not exist, the background will be blue.)

Employee Change Requests

Employee Change Request - Approval

Request TypeEmployee Direct DepositEmployee Name2461 - Sarsfield, ShelbyRequest Date06/16/2017Request StatusPending

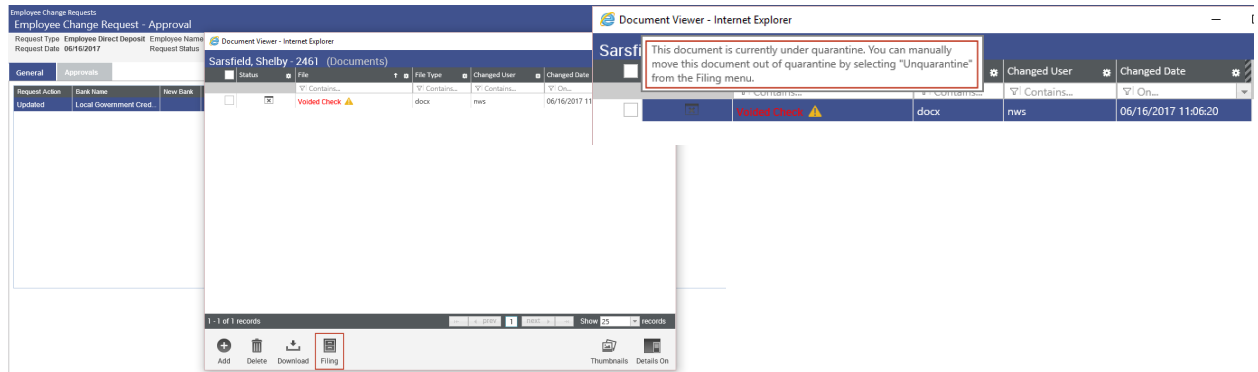
General

Approvals

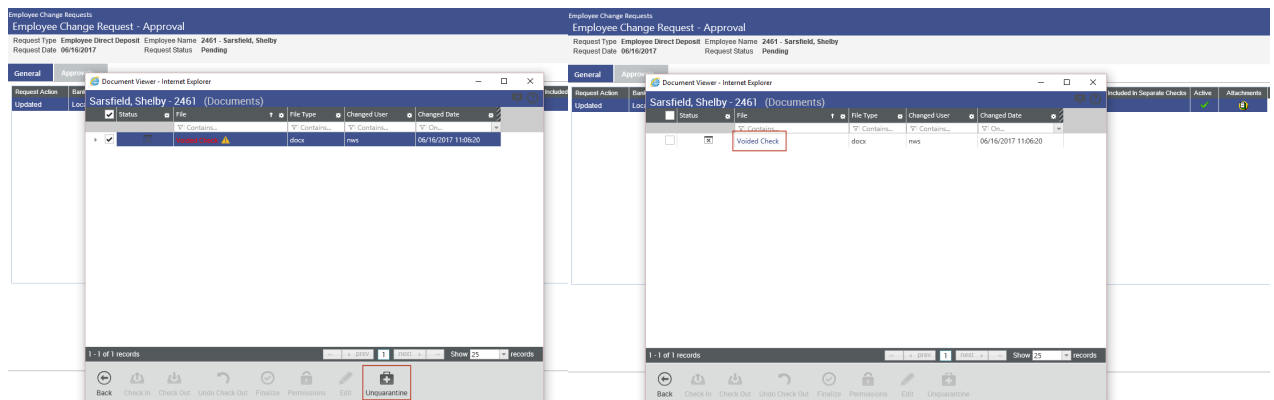
Request Action	Bank Name	New Bank	Account Number	Routing Number	Account Type	Amount	Frequency	Life To Date Amount	Included In Separate Checks	Active	Attachments
Updated	Local Government Cred...		06600996966	253184537	Checking	\$ 100.0000	All-All Pays				

4. To view the attached file, click the icon. (You also may view the file by clicking the same icon from the Employee Change Requests page.)

The **Document Viewer** will open. The file link will appear in red with a yellow icon to the right of it, indicating the file is under quarantine and not yet viewable. (Hovering over the icon will display a **tooltip** that explains how to "unquarantine" the file.)



5. Click the **Filing** icon at the bottom of the viewer.
6. Click the **Unquarantine** icon. After you have taken the file out of quarantine, the **file link** will display in blue, indicating the file is viewable.



7. Click the file link to view the document.



Note: Within the Document Viewer, based on security rights, you are able to view, add and delete documents.

8. Close the Document Viewer.
9. Click the **Approvals** tab. This tab will contain two buttons, **Approve** and **Deny**.

Employee Change Requests
Employee Change Request - Approval

Request Type	Employee Direct Deposit	Employee Name	2461 - Sarsfield, Shelby
Request Date	06/16/2017	Request Status	Pending

General Approvals

test (1) 

Approve Deny

10. To approve the document, click the **Approve** button. The **Add Approval dialog** will open.

Employee Change Requests
Employee Change Request - Approval

Request Type	Employee Direct Deposit	Employee Name	2461 - Sarsfield, Shelby
Request Date	06/16/2017	Request Status	Pending

General Approvals

test (1) 

Approve Deny

new world ERP -- Webpage Dialog

Add Approval

Comments

OK Cancel

11. Add comments, if needed.
12. Click **OK**. The **approver icon** will turn yellow, and the **Approve** button will be replaced by a **Post** button.

Employee Change Requests
Employee Change Request - Approval

Request Type	Employee Direct Deposit	Employee Name	2461 - Sarsfield, Shelby
Request Date	06/16/2017	Request Status	Pending

General
 Approvals

test (1) 
 NWS

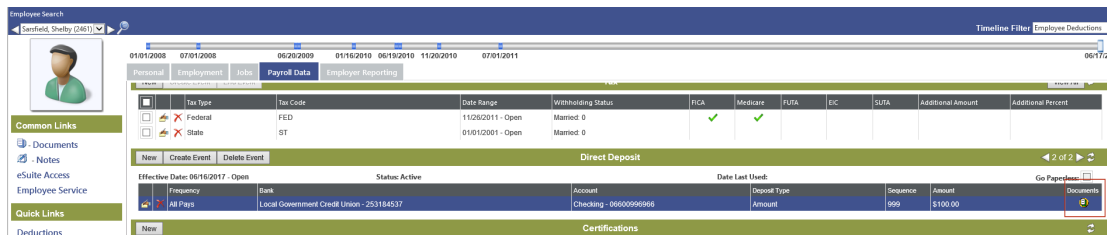
Post Deny

- To post the change request and add the document to the employee's Workforce and eEmployee Direct Deposit pages, click the **Post** button. The buttons will be removed from the tab, and if email notifications have been configured, an email will be sent to the employee. The change request also will be updated to a posted status.

View employee's voided check in Workforce

- Log in to new world ERP.
- Navigate to Human Resources > Workforce Administration > Search.
- Search for the employee.
- Click the *Employee Number*. The Employee's Workforce page will open.
- Click the **Payroll Data** tab.
- In the **Quick Links** section on the left side of the page, click **Direct Deposit**.
- In the Direct Deposits grid, find the row corresponding with the direct deposit change that included the uploaded check.
- A new **Documents column** will show a **Documents** icon with a yellow background.

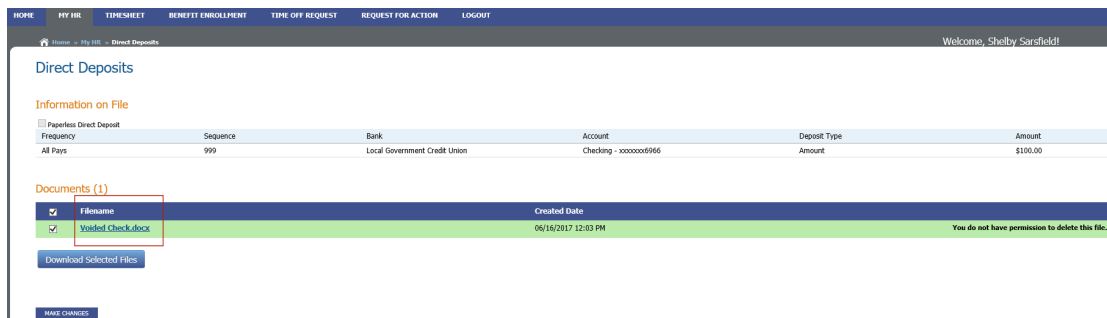
Click the icon to view the document.



The screenshot shows the eEmployee portal interface. On the left is a sidebar with 'Common Links' (Documents, Notes, eSuite Access, Employee Service, Quick Links, Deductions) and 'Employee Search' (Sanfield, Shelby (2401)). The main area has tabs for Personal, Employment, Jobs, Payroll Data, and Employer Reporting. The 'Payroll Data' tab is active, showing a 'Direct Deposit' section. Below this is a table with columns: Effective Date, Frequency, Bank, Account, Deposit Type, Sequence, Amount, and Documents. A red box highlights the 'Documents' column header, which contains a document icon. The table shows one entry for 'All Pays' with a 'Local Government Credit Union' account.

View employee's voided check in eEmployee

1. Log in to the HR Portal.
2. Navigate to MY HR > Direct Deposits.
3. The voided check will appear as a link in the *Filename* column of the **Documents** grid.



The screenshot shows the 'Direct Deposits' page in the eEmployee portal. It includes a 'Paperless Direct Deposit' section with a table showing deposit details. Below this is a 'Documents (1)' section with a table. A red box highlights the 'Voided Check.docx' link in the 'Filename' column. The 'Created Date' is 06/16/2017 12:03 PM. A message at the bottom right states: 'You do not have permission to delete this file.'

4. To view the check, click the link. (If you are viewing multiple documents, select the corresponding check boxes and click the **Download Selected Files** button.)



Note: Posted documents cannot be deleted from eEmployee or Workforce Administration.

Prevent Direct Deposit Disabling

From the eEmployee portal, employees may disable all direct deposits by navigating to MY HR > Direct Deposits, clicking **MAKE CHANGES** and selecting the **Disable Direct Deposits** check box on the Direct Deposit-Change Form page.

eSuite HR Portal
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[HOME](#)
[MY HR](#)
[TIMESHEET](#)
[BENEFIT ENROLLMENT](#)
[TIME OFF REQUEST](#)
[REQUEST FOR ACTION](#)
[LOGOUT](#)

[Home](#) » [My HR](#) » [Direct Deposits](#) » [Direct Deposit](#)

Direct Deposit - Change Form

☒ Paperless Direct Deposit
☒ Disable Direct Deposit

DELETE X

BANK	TCF Bank MN - 291070001	ACCOUNT TYPE	Checking
Sequence	999	ACCOUNT #	9963696999
Amount Type/Amount	Balance of Net	FREQUENCY	All - All

ADD A DISTRIBUTION

BANK		ADD DISTRIBUTION
------	--	----------------------------------

If you want to prevent employees from disabling all direct deposits, you now have the option to hide that check box. To do so, log in to new world Administration, navigate to eHR > eEmployee > Miscellaneous Settings, and deselect the **Allow Disable Direct Deposit** check box.

new world Administration

[Home](#)
[eHR](#)
[ePermits](#)
[eRFA](#)
[eSupplier](#)
[eMiscBilling](#)
[eUtilities](#)
[eLicensing](#)
[eBids](#)
[System-wide Settings](#)

System Module
 Select a Module [eHumanResources](#)

Miscellaneous Settings

	View	Use		View	Use
Accrual Information	☒		Benefits	☒	
Contacts/Dependents	☒	☒	Deductions	☒	
Direct Deposits	☒	☒	Personal Information	☒	☒
Allow Disable Direct Deposit	☒		Taxes	☒	☒
Positions and Pay Rates	☒		Upload Documents	☒	☐
Pay Rate Detail	☒		Print 1095-C Forms	☒	
Paychecks	☒	☒			
Print W-2 Forms	☒				
Print 1099-R Forms	☒				

[Save](#)

The **Disable Direct Deposits** check box will be hidden on the Direct Deposit-Change Form page in eEmployee.

eSuite HR Portal

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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home » My HR » Direct Deposits » Direct Deposit

Direct Deposit - Change Form

☒ Paperless Direct Deposit

DELETE X			
BANK	TCF Bank MN - 291070001	ACCOUNT TYPE	Checking
Sequence	999	ACCOUNT #	9963696999
Amount Type/Amount	Balance of Net	FREQUENCY	All - All

ADD A DISTRIBUTION

BANK		ADD DISTRIBUTION
------	--	------------------

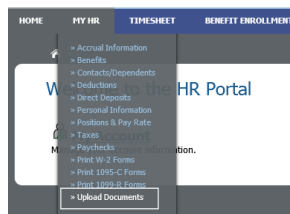
Upload Documents

MY HR > Upload Documents

To let employees upload documents for their employee records, an **Upload Documents** option has been added to the MY HR menu. Administrators may manage the visibility and use of this option through a new **Upload Documents setting** on the eHuman Resources Miscellaneous Settings page (eAdministration > eHR > eEmployee > Miscellaneous Settings).

eSuite HR Portal

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new world Administration

Home eHR ePermits eRFA eSupplier eMiscBilling eUtilities eLicensing eBids System-wide Settings

System Module

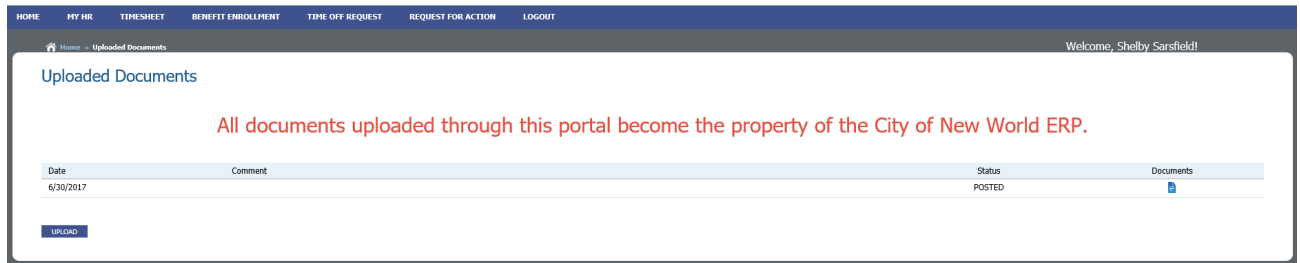
Select a Module: eHumanResources

Miscellaneous Settings

	View	Use		View	Use
Accrual Information	☒	☒	Benefits	☒	☒
Contacts/Dependents	☒	☒	Deductions	☒	☒
Direct Deposits	☒	☒	Personal Information	☒	☒
Positions and Pay Rates	☒	☒	Taxes	☒	☐
Pay Rate Detail	☒	☒	Upload Documents	☒	☒
Paychecks	☒	☐	Print W-2 Forms	☒	☒
Print 1095-C Forms	☒	☒	Print 1099-R Forms	☒	☒

Save

Selecting the *Upload Documents* menu option opens the **Uploaded Documents** page.



HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Welcome, Shelby Sarsfield!

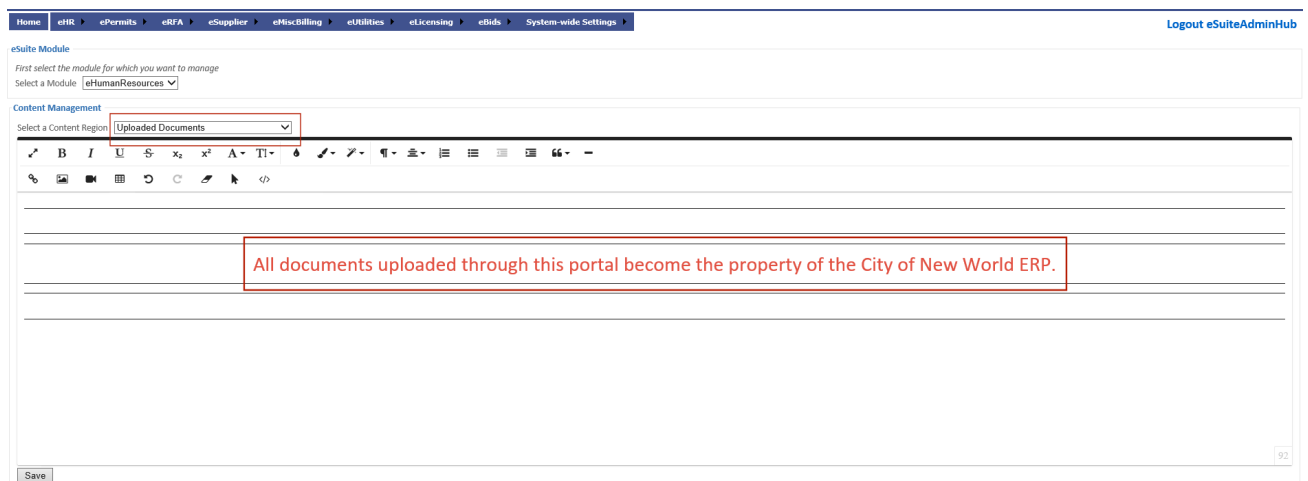
Uploaded Documents

All documents uploaded through this portal become the property of the City of New World ERP.

Date	Comment	Status	Documents
6/30/2017		POSTED	

UPLOAD

Documents the employee already has uploaded are shown here in a grid, with each row corresponding to a document and containing the date it was submitted, an optional comment, status and a document viewing icon. The area above the grid also may contain custom messages created through the new **Uploaded Documents** content region on the **Content Configuration page** (eAdministration > eHR > eEmployee > Content Configuration).



Home eHR ePermits eRFA eSupplier eMiscBilling eUtilities eLicensing eBids System-wide Settings Logout eSuiteAdminHub

eSuite Module

First select the module for which you want to manage

Select a Module: eHumanResources

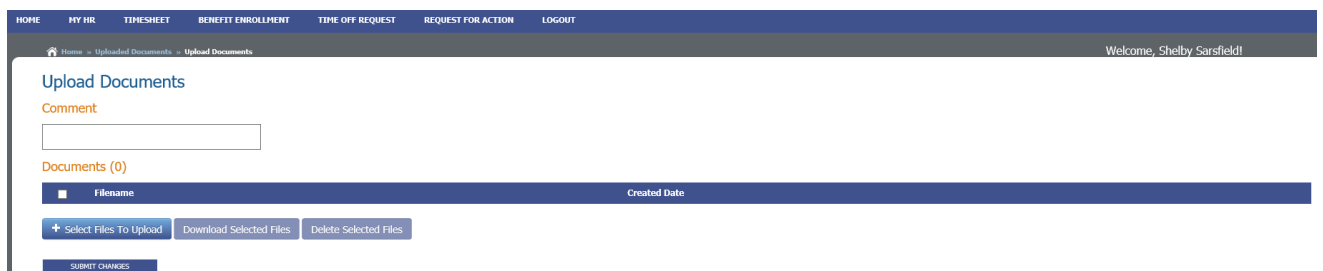
Content Management

Select a Content Region: Uploaded Documents

All documents uploaded through this portal become the property of the City of New World ERP.

Save

Below the grid on the Uploaded Documents page is an **UPLOAD** button. Clicking this button opens the **Upload Documents** page.



HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Welcome, Shelby Sarsfield!

Uploaded Documents

Comment

Documents (0)

Select Files To Upload Download Selected Files Delete Selected Files

SUBMIT CHANGES

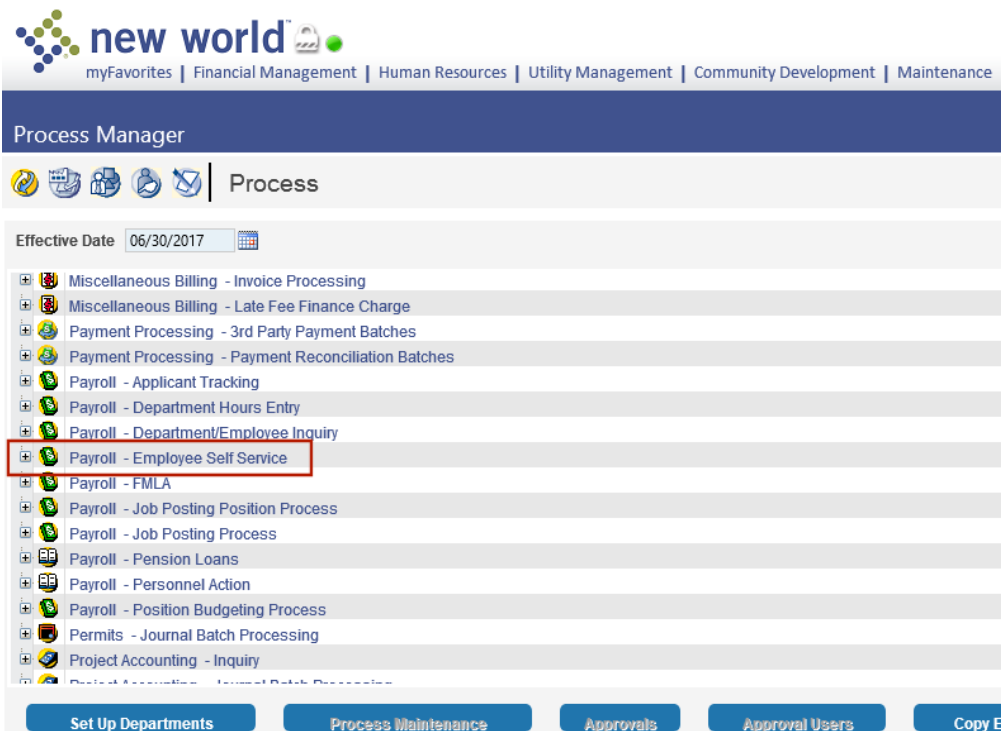
This page contains a *Comment* field for the optional entry of a comment related to the document being uploaded and buttons for **selecting files to upload**, **downloading files** and **deleting files**.

+ Select Files To Upload **Download Selected File** **Delete Selected Files**

After selecting a file to upload, the employee must click the **SUBMIT CHANGES** button. Once the file has been approved and posted in new world ERP (Human Resources > eSuite > Employee Change Request), it will be available for viewing on the employee's Uploaded Documents page in eHR and as a *Documents* link in the **Common Links** panel of the employee's Workforce Administration page.



Note: Approvals for document upload requests are created based on the **Payroll-Employee Self Service** process in **Process Manager** (Maintenance > new world ERP Suite > Process Manager).



The screenshot shows the 'new world' logo and navigation menu at the top. Below the 'Process Manager' header, there is a 'Process' section with a list of processes. The 'Effective Date' is set to 06/30/2017. The list includes various processes such as 'Miscellaneous Billing - Invoice Processing', 'Payroll - Applicant Tracking', and 'Payroll - Employee Self Service', which is highlighted with a red box. At the bottom, there are buttons for 'Set Up Departments', 'Process Maintenance', 'Approvals', 'Approval Users', and 'Copy E'.



Note: To see an example of the end-to-end process of uploading and submitting a document from eHR and approving, posting and viewing it in new world ERP, click [here](#).

Employee Upload Documents has been added as a request type on the **Change Request Type page** in new world ERP Maintenance (Maintenance > new world ERP Suite > Security > Change Request Type). Uploaded documents always require approval, so the *Approval Required* column is checked automatically and cannot be unchecked.

Change Request Type

Search Criteria
 Request Type

Search
Reset

Request Type	Approval Required
Employee Contacts	
Employee Contacts And Dependents	✓
Employee Date Of Birth	✓
Employee Direct Deposit	✓
Employee Email	
Employee Name	✓
Employee Phone Number	
Employee Physical Address	✓
Employee Upload Documents	✓

Refresh

View Active Data Only

MY HR > Benefits/Deductions/Taxes

The **benefits**, **deductions** and **taxes** pages have been modified to display active information by default, with inactive or unused data collapsed under a history heading. Clicking the heading will expand the data for viewing.



Benefit History **Collapsed, Expanded**

eSuite HR Portal
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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home > My HR > Benefits

Benefit Information

Current Benefits

Benefit	Amount	Percent	Frequency
401K LEO - 401K LEO Employees		5.0000%	All Pays
Dental Ins - Dental Insurance	\$16.74		1st and 2nd Pays
Flexi-Credits - Flexi-Credits		8.0000%	All Pays
LGRS L - LGRS LEO Employees		0.0000%	1st and 2nd Pays
LGRS Life - LGRS Life		1479.0000%	1st and 2nd Pays

[Benefit History](#)

eSuite HR Portal
Powered by Tyler Technologies

HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home > My HR > Benefits

Benefit Information

Current Benefits

Benefit	Amount	Percent	Frequency
401K LEO - 401K LEO Employees		5.0000%	All Pays
Dental Ins - Dental Insurance	\$16.74		1st and 2nd Pays
Flexi-Credits - Flexi-Credits		8.0000%	All Pays
LGRS L - LGRS LEO Employees		0.0000%	1st and 2nd Pays
LGRS Life - LGRS Life		1479.0000%	1st and 2nd Pays

Benefit History Below is a history of your benefits. These items are no longer active as of the end date indicated.

Benefit	Amount	Percent	Frequency
401K LEO - 401K LEO Employees			All Pays
401K LEO - 401K LEO Employees			All Pays
401K LEO - 401K LEO Employees			All Pays
401K LEO - 401K LEO Employees			All Pays
401K LEO - 401K LEO Employees		5.0000%	All Pays
401K LEO - 401K LEO Employees		5.0000%	1st and 2nd Pays
Dental Ins - Dental Insurance	\$16.74		1st and 2nd Pays
Dental Ins - Dental Insurance	\$16.74		1st and 2nd Pays
Flexi-Credits - Flexi-Credits	\$245.60		1st and 2nd Pays
Flexi-Credits - Flexi-Credits	\$256.52		1st and 2nd Pays
Flexi-Credits - Flexi-Credits	\$245.65		1st and 2nd Pays
Flexi-Credits - Flexi-Credits	\$0.00		1st and 2nd Pays
Flexi-Credits - Flexi-Credits	\$262.92		1st and 2nd Pays
Flexi-Credits - Flexi-Credits			1st and 2nd Pays
Flexi-Credits - Flexi-Credits			1st and 2nd Pays
Flexi-Credits - Flexi-Credits			1st and 2nd Pays

Deduction History Collapsed, Expanded

eSuite HR Portal
Powered by Tyler Technologies

HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home > My HR > Deductions

Deduction Information

Current Deductions

Deduction	Amount	Percent	Frequency
401K - 401K	\$20.00		All - All Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Critical care - Critical care/cancer	\$8.03		1.2 - 1st and 2nd Pays
Dental Ins_NG - Dental Insurance	\$11.68		1.2 - 1st and 2nd Pays
DEPD Life - Dependent Life Ins.	\$1.63		1.2 - 1st and 2nd Pays
Life AT - Life After Tax	\$7.20		1.2 - 1st and 2nd Pays
Med Ins_NG 80/20 - STATE 80/20 PLAN	\$292.26		1.2 - 1st and 2nd Pays
Retirement - Retirement		6.0000%	All - All Pays
Vision - Vision Insurance	\$4.07		1.2 - 1st and 2nd Pays

[Deduction History](#)

eSuite HR Portal
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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home > My HR > Deductions

Deduction Information

Current Deductions

Deduction	Amount	Percent	Frequency
401K - 401K	\$20.00		All - All Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Critical care - Critical care/cancer	\$8.03		1.2 - 1st and 2nd Pays
Dental Ins_NG - Dental Insurance	\$11.68		1.2 - 1st and 2nd Pays
DEPD Life - Dependent Life Ins.	\$1.63		1.2 - 1st and 2nd Pays
Life AT - Life After Tax	\$7.20		1.2 - 1st and 2nd Pays
Med Ins_NG 80/20 - STATE 80/20 PLAN	\$292.26		1.2 - 1st and 2nd Pays
Retirement - Retirement		6.0000%	All - All Pays
Vision - Vision Insurance	\$4.07		1.2 - 1st and 2nd Pays

Deduction History Below is a history of your Deductions. These items are no longer active as of the end date indicated.

Deduction	Amount	Percent	Frequency
ADAD_NG - Accidental DAD	\$3.61		1.2 - 1st and 2nd Pays
ADAD_NG - Accidental DAD	\$3.61		1.2 - 1st and 2nd Pays
ADAD_NG - Accidental DAD	\$3.61		1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits	\$0.00		1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits	\$0.00		1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits	\$3.61		1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits	\$252.72		1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits	\$0.00		1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Benefits Pre - Pre Tax Benefits			1.2 - 1st and 2nd Pays
Dental Ins_NG - Dental Insurance	\$11.78		1.2 - 1st and 2nd Pays

Tax History Collapsed, Expanded



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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

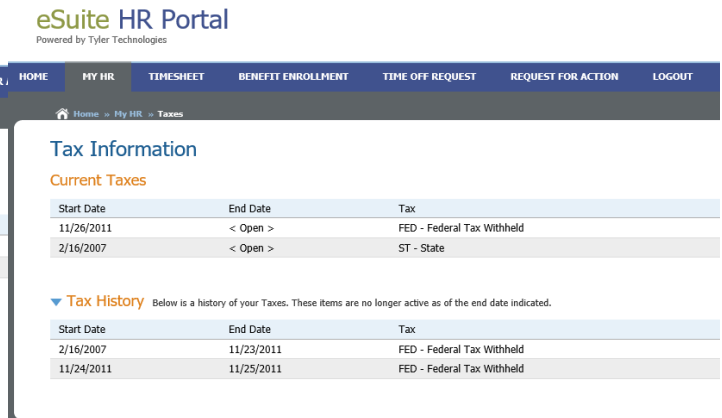
Home > My HR > Taxes

Tax Information

Current Taxes

Start Date	End Date	Tax
11/26/2011	< Open >	FED - Federal Tax Withheld
2/16/2007	< Open >	ST - State

▶ Tax History



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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home > My HR > Taxes

Tax Information

Current Taxes

Start Date	End Date	Tax
11/26/2011	< Open >	FED - Federal Tax Withheld
2/16/2007	< Open >	ST - State

▼ Tax History Below is a history of your Taxes. These items are no longer active as of the end date indicated.

Start Date	End Date	Tax
2/16/2007	11/23/2011	FED - Federal Tax Withheld
11/24/2011	11/25/2011	FED - Federal Tax Withheld

W-4 Processing Enhancements

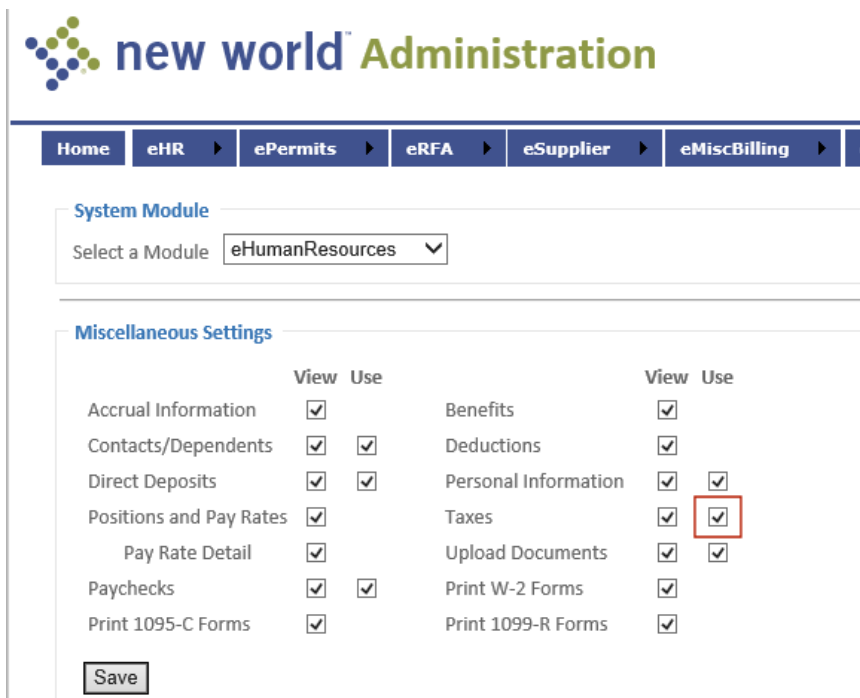
A new Tax Requests feature in eHR lets employees submit updates to their W-4 federal tax withholding information online.

The following step-by-step tutorial shows you how to set up and use this feature:

eHR Setup

Add the Tax Requests option to the My HR menu

1. In eAdministration, navigate to eHR > eEmployee > [Miscellaneous Settings](#) page.



new world Administration

Home eHR ePermits eRFA eSupplier eMiscBilling e

System Module

Select a Module eHumanResources

Miscellaneous Settings

	View	Use		View	Use
Accrual Information	☒		Benefits	☒	
Contacts/Dependents	☒	☒	Deductions	☒	
Direct Deposits	☒	☒	Personal Information	☒	☒
Positions and Pay Rates	☒		Taxes	☒	☒
Pay Rate Detail	☒		Upload Documents	☒	☒
Paychecks	☒	☒	Print W-2 Forms	☒	
Print 1095-C Forms	☒		Print 1099-R Forms	☒	

Save

2. A *Use* check box has been added to the Taxes setting. Select this box to add the *Tax Requests* option to the My HR menu on the eSuite HR Portal.

Add custom messages to the Tax Request pages

1. In eAdministration, navigate to eHR > eEmployee > Content Configuration.
2. In the *Select a Module* field, select **eHumanResources**.
3. In the *Select a Content Region* field, select the new **Tax Request Custom Content** option. The custom content area loads below the field.



Home eHR ePermits eRFA eSupplier eMiscBilling eUtilities eLicensing eBids System-wide Settings

eSuite Module

First select the module for which you want to manage

Select a Module **eHumanResources**

Content Management

Select a Content Region **Tax Request Custom Content**



Tax Request is for federal taxes only.

For more information, please review the IRS W-4 Form by clicking on the link <https://www.irs.gov/pub/irs-pdf/fw4.pdf>

The same custom content is used on the Pending Tax Request and New Tax Request.

Save

4. Use this area to add messages, reminders or any other type of information you want to appear on the [pages].
5. Click **Save**.
6. In the Select a Content Region field, select the new **W-4 Submit Signature** option.

new world Administration

[Home](#)
[eHR](#)
[ePermits](#)
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[eSupplier](#)
[eMiscBilling](#)
[eUtilities](#)
[eLicensing](#)
[eBids](#)
[System-wide Settings](#)

eSuite Module
First select the module for which you want to manage
 Select a Module eHumanResources

Content Management
 Select a Content Region W-4 Submit Signature



This is an additional customized comment section that can be added to the hard coded message above.

Save

- In the custom content area, add what you want to appear on the Confirm dialog that appears when an employee submits a W-4 update.



Note: Above your custom content, the following statement will appear automatically on the Confirm dialog and cannot be changed: "Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete."

- Click **Save**.

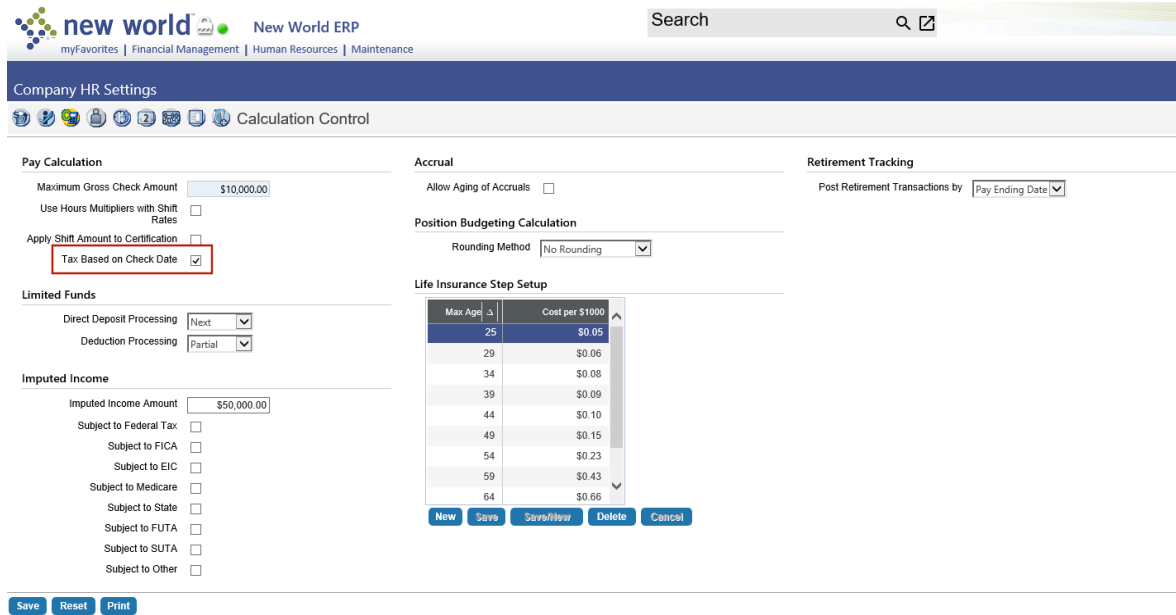
New World ERP Setup

Base tax change on check date or pay end date

- To determine whether the effective date of a W-4 tax change occurs on the check date or pay end date, navigate to Maintenance > Human Resources > Company

HR Settings.

- Click the **Calculation Control** icon at the top of the page.
- To have the tax change occur on the check date, select the **Tax Based on Check Date** check box. To have the change occur on the pay end date, deselect this box.



new world New World ERP
myFavorites | Financial Management | Human Resources | Maintenance

Search

Company HR Settings

Calculation Control

Pay Calculation

Maximum Gross Check Amount

Use Hours Multipliers with Shift Rates ☐

Apply Shift Amount to Certification ☐

Tax Based on Check Date ☒

Limited Funds

Direct Deposit Processing

Deduction Processing

Imputed Income

Imputed Income Amount

Subject to Federal Tax ☐

Subject to FICA ☐

Subject to EIC ☐

Subject to Medicare ☐

Subject to State ☐

Subject to FUTA ☐

Subject to SUTA ☐

Subject to Other ☐

Accrual

Allow Aging of Accruals ☐

Position Budgeting Calculation

Rounding Method

Life Insurance Step Setup

Max Age	Cost per \$1000
25	\$0.05
29	\$0.06
34	\$0.08
39	\$0.09
44	\$0.10
49	\$0.15
54	\$0.23
59	\$0.43
64	\$0.66

Post Retirement Transactions by

Now Save Save/View Delete Cancel

Save Reset Print

- Click **Save**.

Will W-4 updates require approvals?

- If you want approvals to be required for W-4 updates, navigate to Maintenance > new world ERP Suite > Security > Change Request Type. The Change Request Type page opens.
- Scroll down to the new **Employee Tax** request type and click it. The **Change Request Type dialog** opens.

 **new world**  **New World ERP**
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Change Request Type

Search Criteria
Request Type

Search **Reset**

Request Type	Approval Required
Employee Contacts And Dependents	✓
Employee Date Of Birth	✓
Employee Direct Deposit	✓
Employee Email	
Employee Name	✓
Employee Phone Number	
Employee Physical Address	✓
Employee Tax	
Employee Upload Documents	

Refresh

new world ERP -- Webpage Dialog

https://trovmerphub.corp.tylertechnologies.com/Logos/Logo

Change Request Type

Request Type Employee Tax

Approval Required ☒

OK **Cancel**

- If you use the Process Manager approval process and want approvals to be required, select the *Approval Required* check box. If not, deselect it.
- Click **OK**. If you selected the box, a **green check mark** appears in the **Approval Required** column of the grid.

 **new world**  **New World ERP**
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Search  

Change Request Type

Search Criteria
Request Type

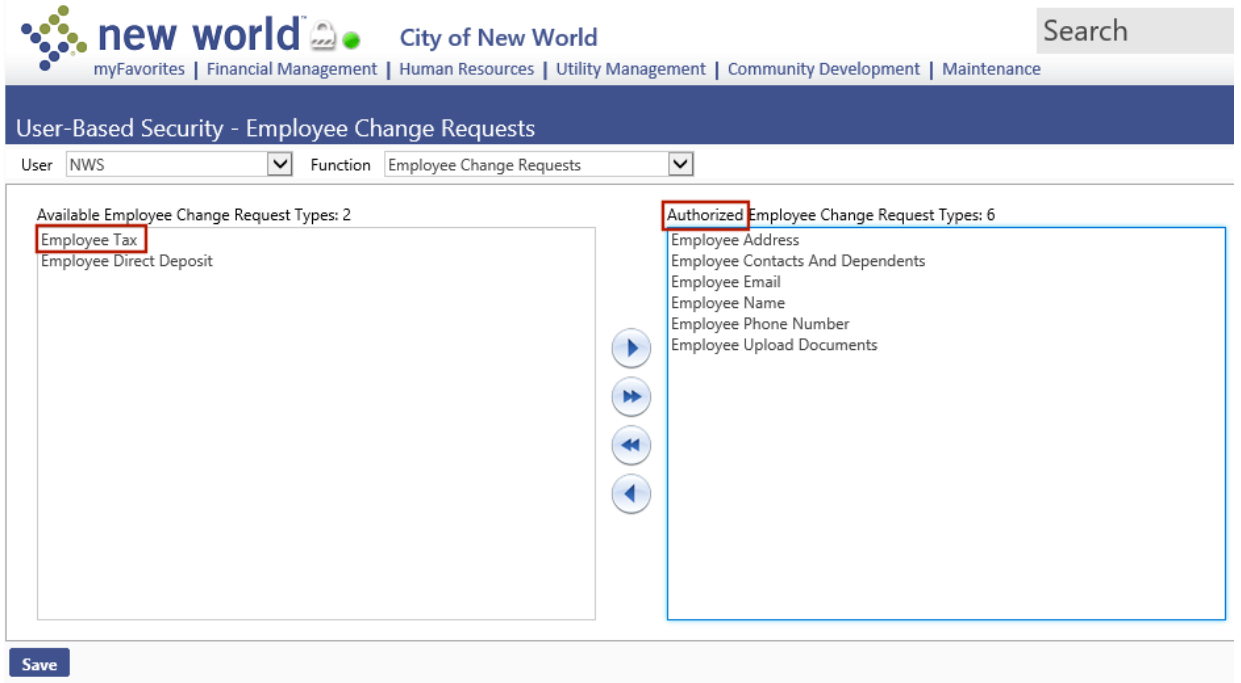
Search **Reset**

Request Type	Approval Required
Employee Contacts And Dependents	✓
Employee Date Of Birth	✓
Employee Direct Deposit	✓
Employee Email	
Employee Name	✓
Employee Phone Number	
Employee Physical Address	✓
Employee Tax	✓
Employee Upload Documents	✓

Refresh

Secure change request types

1. To give a user access to the **Employee Tax** change request type, navigate to Maintenance > new world ERP Suite > Security > User-Based Security.



new world City of New World

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Search

User-Based Security - Employee Change Requests

User: NWS Function: Employee Change Requests

Available Employee Change Request Types: 2

- Employee Tax
- Employee Direct Deposit

Authorized Employee Change Request Types: 6

- Employee Address
- Employee Contacts And Dependents
- Employee Email
- Employee Name
- Employee Phone Number
- Employee Upload Documents

Save

2. Select the **Employee Change Requests** function.
3. Move **Employee Tax** from the *Available* list box to the *Authorized* list box.
4. Click **Save**.

Select permissions to W-4 documents

1. To select the type(s) of permission a user will have to W-4 documents, navigate to Maintenance > new world ERP Suite > Security > Users.
2. Select the user.
3. Click the **Permissions** button. The User Permissions page opens.
4. In the *Search Security Components* field of the **Filter** panel, type **workforce administration documents**. The **Permissions** panel refreshes to contain the **Workforce Administration Documents** security component.
5. Select the appropriate permissions.
6. Click **Save**.
7. In the *Search Security Components* field, type **employee tax documents**. The **Permissions** panel refreshes to contain the **Employee Tax Documents** component.
8. Select the appropriate permissions.

9. Click **Save**.
10. For the permissions to take effect, the user needs to sign off and sign back onto the system.

Set up withholding status alternate values

To determine how the withholding status box is selected on the W-4, set up alternate values for the Withholding Status validation set. Follow the steps below, making the entries exactly as shown:

1. Navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List.
2. Select *Set Number 11, Withholding Status*.
3. Click the **Values** button. The Validation Set Values List page opens.
4. Select the row containing a federal withholding status.
5. Click the **Alternates** button. The Alternate Value List page opens.
6. Click the **New** button. The Alternate Value dialog opens.
7. Select the *Usage Type, NWS Quick Value*.
8. In the *Value* field, type an **S**.
9. In the *Description* field, type **Single**.
10. Click **OK**.
11. Repeat steps 4-10 for the following withholding statuses:

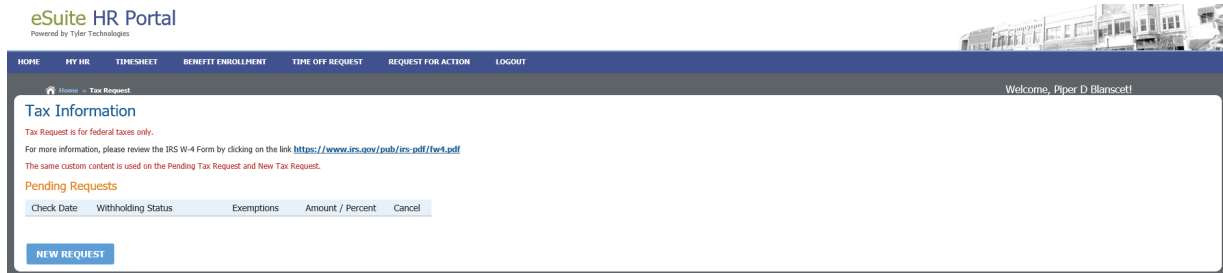
Value	Description
<i>S</i>	<i>Single</i>
<i>M</i>	<i>Married</i>
<i>MFS</i>	<i>Married filing Single</i>

W-4 update through eHR

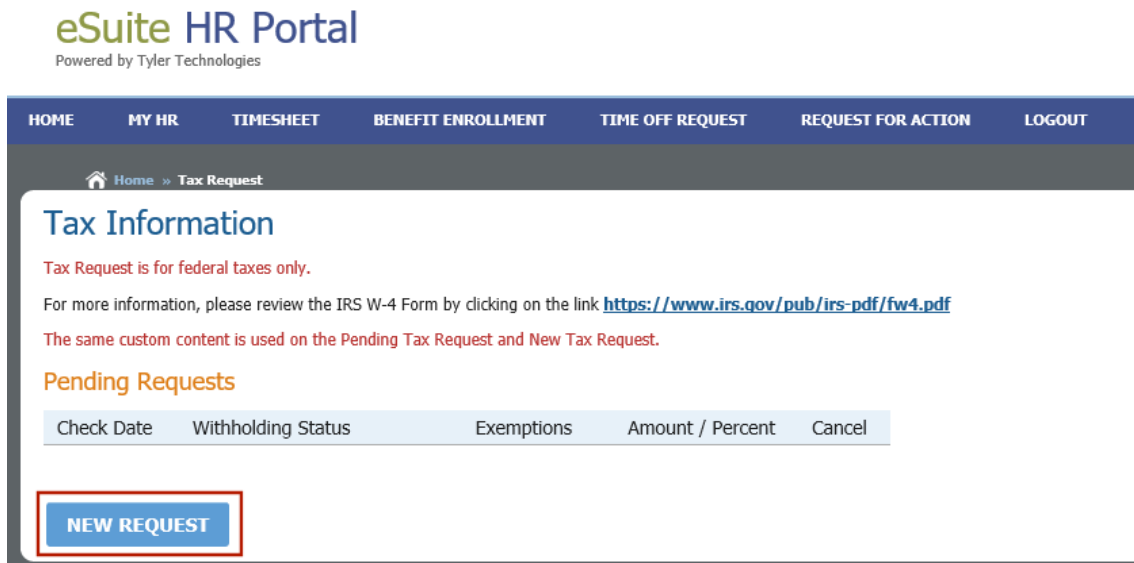
1. From the eSuite HR Portal, select the **Tax Requests option** on the My HR Menu.



The **Tax Information** page opens.



2. Click the **NEW REQUEST** button.



The **Tax Information Change Form** opens, containing a *Current* column showing the current W-4 selections and a *Requested* column for making new selections. The top three fields require selections.

eSuite HR Portal

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[HOME](#)
[MY HR](#)
[TIMESHEET](#)
[BENEFIT ENROLLMENT](#)
[TIME OFF REQUEST](#)
[REQUEST FOR ACTION](#)
[LOGOUT](#)

[Home](#) » [Tax Request](#)

Tax Information

Tax Request is for federal taxes only.

For more information, please review the IRS W-4 Form by clicking on the link <https://www.irs.gov/pub/irs-pdf/fw4.pdf>

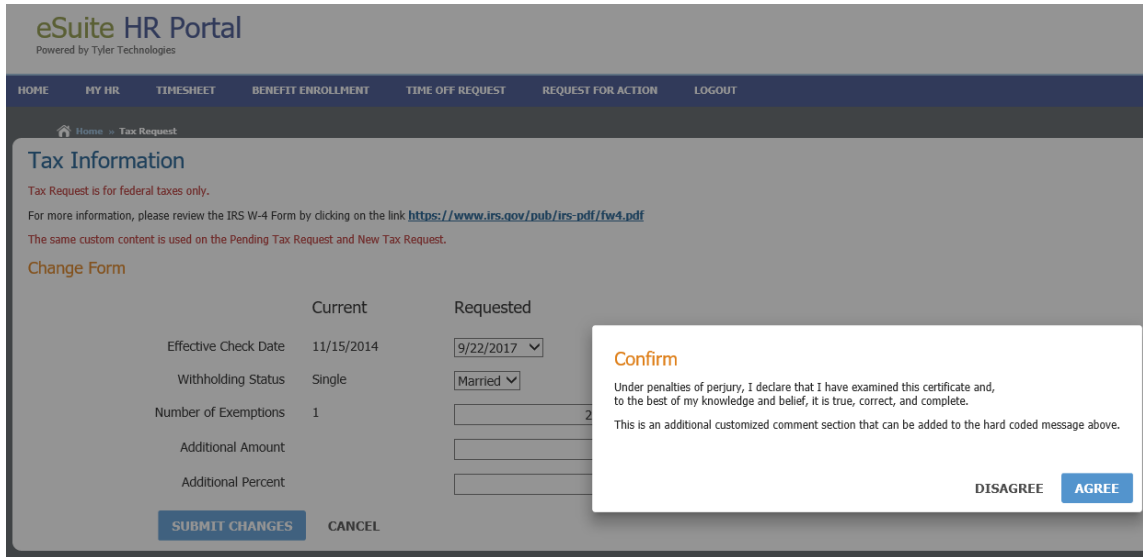
The same custom content is used on the Pending Tax Request and New Tax Request.

Change Form

	Current	Requested
Effective Check Date	11/15/2014	9/22/2017 ▼
Withholding Status	Single	Married ▼
Number of Exemptions	1	2 x
Additional Amount		
Additional Percent		

SUBMIT CHANGES
 CANCEL

3. Select the *Effective Check Date*. Starting with the first effective check date from today's date, the drop-down contains the effective check dates of the next ten pay batches.
4. Select a *Withholding Status*. The drop-down contains only the statuses that have been set up for federal withholding.
5. Select the *Number of Exemptions*.
6. Use the *Additional Amount* field if you want an additional dollar amount withheld from pay checks, the *Additional Percent* field if you want an additional percent withheld.
7. When satisfied with your changes, click the **SUBMIT CHANGES** button. A **Confirm dialog** opens, serving as your electronic signature.



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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home » Tax Request

Tax Information

Tax Request is for federal taxes only.

For more information, please review the IRS W-4 Form by clicking on the link <https://www.irs.gov/pub/irs-pdf/fw4.pdf>

The same custom content is used on the Pending Tax Request and New Tax Request.

Change Form

	Current	Requested
Effective Check Date	11/15/2014	9/22/2017
Withholding Status	Single	Married
Number of Exemptions	1	2
Additional Amount		
Additional Percent		

SUBMIT CHANGES CANCEL

Confirm

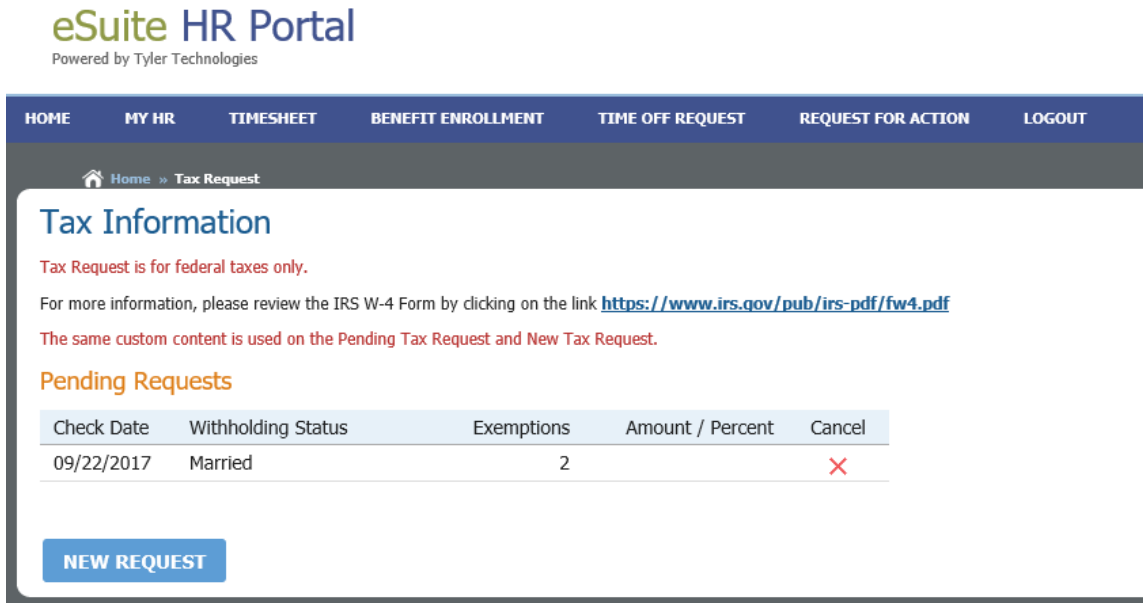
Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

This is an additional customized comment section that can be added to the hard coded message above.

DISAGREE **AGREE**

This dialog may contain custom content that was added through the Content Configuration option in eAdministration.

- If you agree with the statement on the dialog, click **AGREE**, and the changes will be submitted and validated; otherwise, click **DISAGREE**. If you agree with the changes, the **Tax Information** page reopens, and the grid shows your request as pending.



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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Home » Tax Request

Tax Information

Tax Request is for federal taxes only.

For more information, please review the IRS W-4 Form by clicking on the link <https://www.irs.gov/pub/irs-pdf/fw4.pdf>

The same custom content is used on the Pending Tax Request and New Tax Request.

Pending Requests

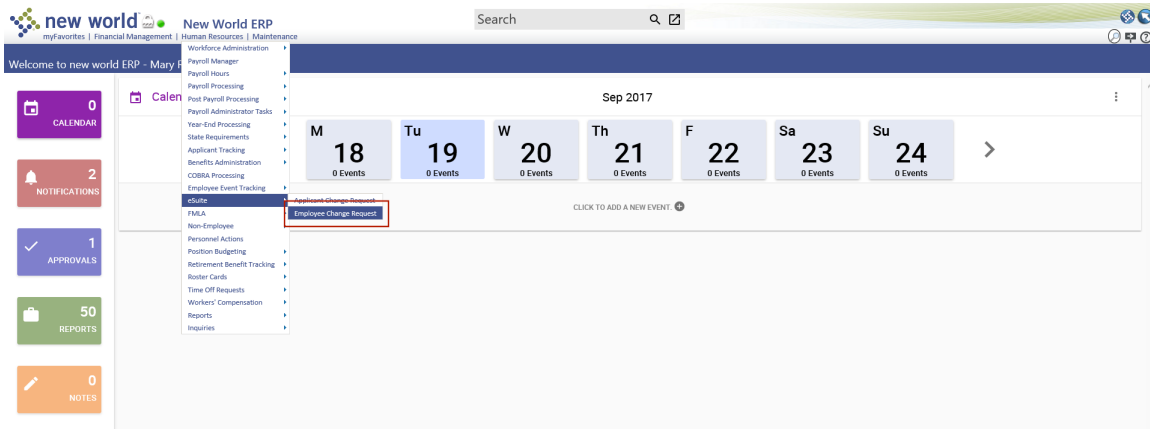
Check Date	Withholding Status	Exemptions	Amount / Percent	Cancel
09/22/2017	Married	2		X

NEW REQUEST

If you want to cancel the request, click the red **X** in the *Cancel* column.

W-4 update approval and post in new world ERP

1. Log in to new world ERP.
2. Navigate to **Human Resources > eSuite > Employee Change Request**. The Employee Change Requests page opens.



3. Click the **Employee name** in the row representing the change request.



new world

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New World ERP

Search



Employee Change Requests

myTasks	Approvals	Department	Employee	Request Type	Request Date	Status	Status Date	Attachments
0 of 1 at 1	POL_INV_CINV - Police Investigations...		Blanscet, Piper D - 204	Employee Tax	09/19/2017	Pending	09/19/2017	
Approved	POL_INV_CMOP - Police Investigations...		Digennaro, Juliet B - 89	Employee Address	06/24/2015	Pending	06/24/2015	
Approved	POL_INV_CMOP - Police Investigations...		Digennaro, Juliet B - 89	Employee Contacts And...	06/24/2015	Pending	06/24/2015	
Approved	POL_INV_CMOP - Police Investigations...		Digennaro, Juliet B - 89	Employee Contacts And...	06/24/2015	Pending	06/24/2015	
0 of 1 at 1	POL_PTL_PTRL - Police Patrol Service...		Goldsmith, Pedro D - 106	Employee Contacts And...	09/14/2017	Pending	09/14/2017	
0 of 1 at 1	POL_PTL_PTRL - Police Patrol Service...		Goldsmith, Pedro D - 106	Employee Contacts And...	09/14/2017	Pending	09/14/2017	
0 of 1 at 1	POL_PTL_PTRL - Police Patrol Service...		Goldsmith, Pedro D - 106	Employee Direct Deposit	09/14/2017	Pending	09/14/2017	 1
0 of 1 at 1	POL_PSS_PGA - Police Police Support...		Hagaman, Eve M - 848	Employee Tax	09/18/2017	Pending	09/18/2017	
0 of 1 at 1	POL_PSS_PGA - Police Police Support...		Hagaman, Eve M - 848	Employee Tax	09/18/2017	Pending	09/18/2017	
Approved	POL_INV_DET - Police Investigations D...		Maleszka, Cameron J - 43	Employee Address	06/26/2015	Pending	06/26/2015	
0 of 1 at 1	POL_PTL_PTRL - Police Patrol Service...		McIndoe, Giancarlo J - 866	Employee Address	06/28/2015	Pending	06/28/2015	
0 of 1 at 1	ADM_ADM - Admin Administrative Serv...		Seldon, Eileen E - 727	Employee Contacts And...	09/14/2017	Pending	09/14/2017	
0 of 1 at 1	ADM_ADM - Admin Administrative Serv...		Seldon, Eileen E - 727	Employee Name	09/14/2017	Pending	09/14/2017	

Refresh

Note: The *Request Type* column will show the new request type of **Employee Tax**.

The **Employee Change Request-Approval** page for the **Employee Tax** Request Type opens, containing two tabs, **General** and **Approvals**. The grid on the **General** tab shows the requested changes in red.

new world New World ERP

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Employee Change Requests

Employee Change Request - Approval

Request Type Employee Tax Employee Name 204 - Blanscet, Piper D
 Request Date 09/19/2017 Request Status Pending

General Approvals

Change	Current Value	Requested Change
Pay Batch End Date / Workforce Effective Date	11/15/2014	09/15/2017
Check Date		09/22/2017
Tax	FT - Federal Tax	FT - Federal Tax
Withholding Status	Single	Married
Number of Exemptions	1	2
Additional Amount		
Additional Percent		

[Preview W-4 Form](#)



Note: When the change request is posted (step 6), an event for the new effective date is created in the employee's Workforce Administration Taxes section.

- To preview the W-4 form pending approval, click the **Preview W-4 Form** button.
- Click the **Approvals** tab. This tab contains two buttons, **Approve** and **Deny**.

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Employee Change Requests

Employee Change Request - Approval

Request Type Employee Tax Employee Name 204 - Blanscet, Piper D
 Request Date 09/19/2017 Request Status Pending

General Approvals

level 1 (1) 

level 2 (1) 

[Approve](#) [Deny](#)

- To approve the change, click the **Approve** button. The Add Approval dialog opens, giving you the options to select users at the next approval level, if applicable, and add comments.
- Click **OK**. The approver icon turns yellow, the name of the approver is displayed, and a **Post** button replaces the **Approve** button. If email notifications have been configured, an email is sent to the employee.


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Search 

 Employee Change Requests
Employee Change Request - Approval
 Request Type Employee Tax Employee Name 204 - Blanscet, Piper D
 Request Date 09/19/2017 Request Status Pending

General
 Approvals

level 1 (1) 

 level 2 (1)  Mary Rajczi

Post Deny

- To post the change request and update the employee's Workforce Administration Taxes section, click the **Post** button. The buttons are removed from the tab, and the change request is updated to a **posted status**. To view a posted change, click the *Show Search* link in the top-right corner of the Employee Change Requests page, select **Posted** in the *Status* field, and click **Search**.


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Search 

 Employee Change Requests

Department
 Request Type
 Employee
 Status

Search Reset

myTasks	Approvals	Department	Employee	Request Type	Request Date	Status	Status Date	Attachments
Approved	POL_INV_CMOP - Police Investigations...	Belllowers, Sophie P - 101	Employee Direct Deposit	08/08/2017	Posted	08/08/2017	 -1	
Approved	POL_INV_CMOP - Police Investigations...	Belllowers, Sophie P - 101	Employee Upload Docu...	08/08/2017	Posted	08/08/2017	 -1	
Approved	O&M_ENG - O&M.Engineering	Bienkowski, Tiffany G - 333	Employee Contacts And...	10/10/2014	Posted	10/10/2014		
Approved	O&M_WTR - O&M.Water	Bingham, Zane R - 46	Employee Contacts And...	06/18/2015	Posted	06/18/2015		
Approved	O&M_WTR - O&M.Water	Bingham, Zane R - 46	Employee Tax	09/14/2017	Posted	09/14/2017		
Approved	POL_INV_CINV - Police Investigations...	Blanscet, Piper D - 204	Employee Contacts And...	11/21/2014	Posted	11/21/2014		
Approved	POL_INV_CINV - Police Investigations...	Blanscet, Piper D - 204	Employee Tax	09/19/2017	Posted	09/19/2017		
Approved	REC_PRG_Y&F - Rec.Recreation Prog...	Blosser, Kiley - 470	Employee Contacts And...	10/07/2014	Posted	10/07/2014		
Approved	REC_PRG_Y&F - Rec.Recreation Prog...	Blosser, Kiley - 470	Employee Contacts And...	10/07/2014	Posted	10/07/2014		
Approved	REC_PRG_Y&F - Rec.Recreation Prog...	Blosser, Kiley - 470	Employee Contacts And...	10/07/2014	Posted	10/07/2014		
Approved	REC_PRG_Y&F - Rec.Recreation Prog...	Blosser, Kiley - 470	Employee Contacts And...	10/07/2014	Posted	10/07/2014		
Approved	POL_PTL_PTRL - Police Patrol Service...	Bohnker, Isai M - 1521	Employee Address	03/27/2015	Posted	03/27/2015		

Items: 1 - 50 of 211
 Refresh

View updated withholding status in Workforce

- Log in to New World ERP.
- Navigate to Human Resources > Workforce Administration > Search.
- Search for the employee.

4. Click the *Employee Number*. The Employee's Workforce page opens.
5. Click the **Payroll Data** tab.
6. In the **Quick Links** section on the left side of the page, click **Taxes**.
7. In the **Taxes grid**, the top row should correspond with the new withholding status.

Tax												View All
	Tax Type	Tax Code	Date Range	Withholding Status	FICA	Medicare	FUTA	EC	SUTA	Additional Amount	Additional Percent	Documents
	Federal	FT	09/15/2017 - Open	Married: 2								
	State	ST	11/15/2014 - Open	Single: 1								

View updated withholding status in eEmployee

1. Log in to the HR Portal.
2. Navigate to MY HR > Taxes. The Tax Information page opens.
3. In the **Current Taxes grid**, the top row should correspond with the new withholding status.

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HOME MY HR TIMESHEET BENEFIT ENROLLMENT TIME OFF REQUEST REQUEST FOR ACTION LOGOUT

Welcome, Piper D Blansett!

Tax Information

Current Taxes

Start Date	End Date	Tax	Withholding Status	Exemptions	Additional Amount	Additional Percent
8/15/2017	< Open >	FT - Federal Tax	Married	2		
11/15/2014	< Open >	ST - State Tax	Single	1		

[Tax History](#)

Maintenance

Employee Change Requests User-Based Security

Maintenance > new world ERP Suite > Security > User-Based Security

To let you secure change request types, **Employee Change Requests** has been added as a *Function* on the **User-Based Security page**.


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User-Based Security - Employee Change Requests

User
 Function

Available Employee Change Request Types: 4

- Employee Direct Deposit
- Employee Name
- Employee Tax
- Employee Upload Documents

Authorized Employee Change Request Types: 4

- Employee Address
- Employee Contacts And Dependents
- Employee Email
- Employee Phone Number






Save

The employee change request types available to be secured are address, contacts and dependents, direct deposit, email, name, phone number, tax and upload documents.

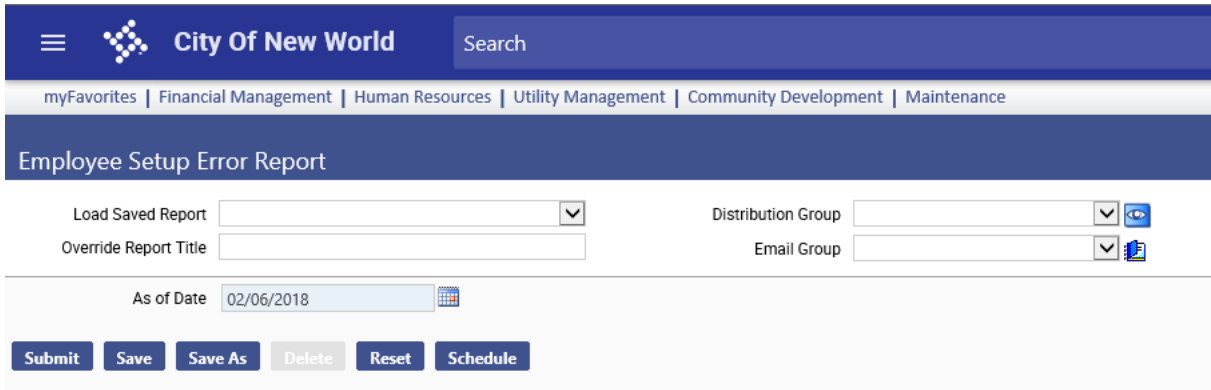
To authorize an employee to a change request type, select it in the *Available* list box and move it to the *Authorized* list box.

Reports

Employee Setup Error Report

Human Resources > Reports > Employee Reports > Employee Setup Error Report

An **Employee Setup Error Report** has been added to the Employee Reports menu.



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Employee Setup Error Report

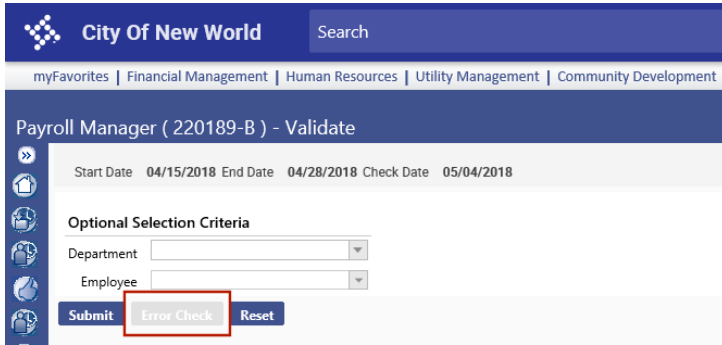
Load Saved Report  Distribution Group  

Override Report Title Email Group  

As of Date 

[Submit](#) [Save](#) [Save As](#) [Delete](#) [Reset](#) [Schedule](#)

Designed to catch setup issues that may or may not affect the running of certain reports and processes, this robust report replaces the Payroll Validation Error Report. As a result, the **Error Check** button to run the Payroll Validation Error Report has been disabled on the [Payroll Validate page](#), and a hover note has been added to communicate the change.



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Payroll Manager (220189-B) - Validate

Start Date 04/15/2018 End Date 04/28/2018 Check Date 05/04/2018

Optional Selection Criteria

Department 

Employee 

[Submit](#) [Error Check](#) [Reset](#)

Running this report gives you a chance to review and clean up errors related to active employees. [View sample](#).

Employee Setup Error Report			
Employee	Status	Area	Issue
Department			
Maintenance - Benefit Codes			
Effective start date is greater than effective end date for Benefit Code Unemployment.			
Maintenance - Benefit Codes			
Effective start date is greater than effective end date for Benefit Code Unemployment.			
Maintenance - Deduction Codes			
Effective date ranges overlap for Deduction Code CERS/HAZ Ret.			
Department 1100 - Board of Commissioners			
6 Bienkowski, Tiffany W			
Workforce - Benefit Plans			
Employee has effective date ranges that overlap on employee benefit administration category Life Insurance.			
5 Boulch, Rodney E			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code COUNTY.			
3622 Cloud, Moon Beam			
Workforce - Employment			
Employee is in an active status with a termination date.			
909 Cool, Declan P			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code COUNTY.			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
1346 Dacanay, Meredith P			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
7 Hohn, Ricardo J			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code COUNTY.			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
854 Hopfauf, Parker S			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code COUNTY.			
1402 Kluesner, Brittany D			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
8 Ralph, Melissa O			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
673 Repress, Giancarlo B			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
9 Sheladia, Charles D			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
1267 Viox, Asha A			
Workforce - Taxes			
Employee has an effective start date that is greater than effective end date on tax Code CITY.			
Department 1200 - Administration			

You may run the report manually for a selected *As of Date* or schedule it to run automatically at selected times. To schedule it to run automatically, select your *Distribution Group*, and click the **Schedule** button. The **Schedule dialog** opens.



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Employee Setup Error Report

Load Saved Report

Distribution Group

Override Report Title

Email Group

As of Date

Schedule

Name

Run ☒ Daily (M-F) ☐ Weekly ☐ Monthly

Start at

End

OK

Make your selections on the dialog and click **OK**. To view a list of all your scheduled reports, navigate to Maintenance > new world ERP Suite > System > Reports > Scheduled Reports Administration.

Permission to new security component required

For the Employee Setup Error Report to be available on the Employee Reports menu, users need permission to a new security component:

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page opens.
2. Select the user's row.
3. Click **Permissions**. The User Permissions page opens, containing a grid of security components and a filter panel.
4. In the *Search Security Components* filter, type **employee setup** (the entry is not case sensitive). The grid reloads to contain the **Employee Setup Error Report** security component only.
5. Select **Full** permissions.
6. Click **Save**.
7. For the permissions to take effect, the user must log off and log back onto the system.

Utility Management

Customer Service

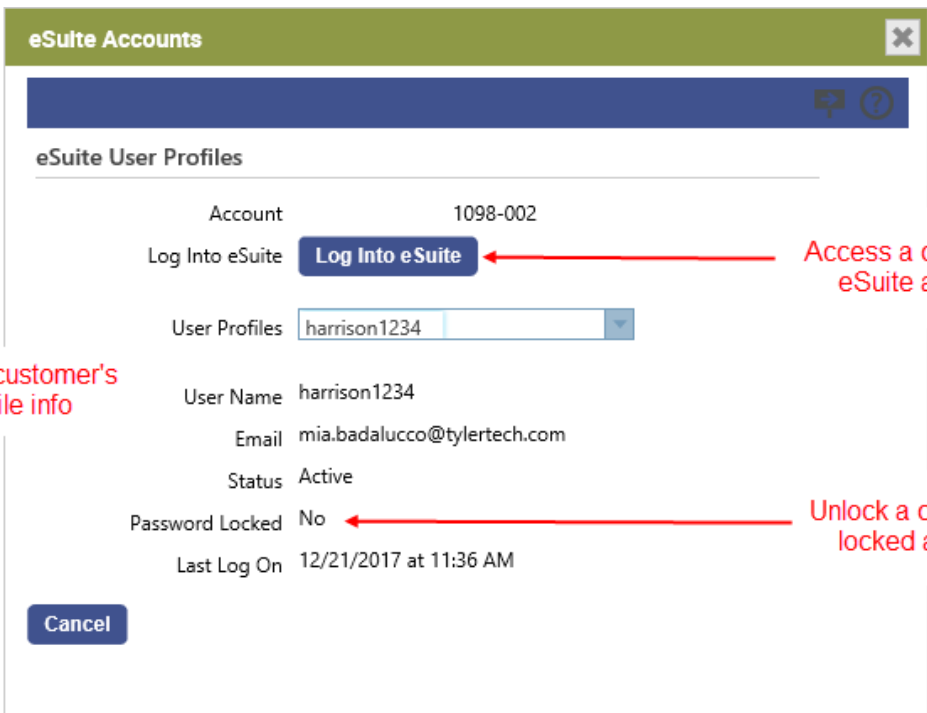
View a Customer's eUtilities Account via Customer Service

Utilities Management > Customer Service > Open an account > Account Information

This section describes how authorized users of New World ERP Utility Management can leverage new functionality to better serve their eUtilities customers. Primary among these new enhancements is the CSR's ability to quickly and easily access a customer's eUtilities account.

The new functionality discussed in this section is all provided through the new **eSuite Accounts pop-up window** (shown below). This window allows CSRs to do the following:

1. **View a Customer's eSuite Account** (as mentioned above). When working with a citizen customer, it's often beneficial for a CSR to see exactly what the customer is looking at and referring to in eUtilities. In earlier releases of the software, CSRs could do this by using flexible credentials. With the 2018.1 release, CSRs can no longer access eSuite in that way. However, new functionality in Customer Service has been added to allow CSRs to easily log into and view a given customer's eSuite account and see exactly what the customer is looking at.
2. **View useful account and profile-related information.** Has a user profile been set up for a given account? If so, has just one profile or multiple profiles been set up for the account? Has anyone accessed eSuite via a given user profile? When was the last time a user accessed an account? CSRs can leverage this new functionality to answer these questions and more.
3. **Unlock a user account.** When a citizen customer attempts to sign into eSuite and incorrectly enters their password too many times, they can get locked out of their account. CSRs now have the ability to unlock a user's account with a click of the mouse.



eSuite Accounts

eSuite User Profiles

Account 1098-002

Log Into eSuite **Log Into eSuite** → Access a customer's eSuite account

User Profiles harrison1234 → View a customer's profile info

User Name harrison1234

Email mia.badalucco@tylertech.com

Status Active

Password Locked No → Unlock a customer's locked account

Last Log On 12/21/2017 at 11:36 AM

Cancel

For detailed instructions on accessing the eSuite Accounts window, see [Step-by-Step: Viewing a Customer's eSuite Account via Utility Management](#) below.

Before you can take advantage of these new features, however, some system setup is required. See [Setup](#) for details.

Setup

System Security

Maintenance > new world ERP Suite > Security > Users > Select the appropriate user

The new **eSuite User Profiles** security component has been added to provide security over the eSuite Accounts pop-up window. Available permissions include **View** and **Change**. Assigning full permission gives the New World ERP user the ability to open the eSuite Accounts pop-up window (described above) and utilize the features within, including viewing a customer's account in eSuite and unlocking a locked eSuite account.

Permissions									
☐	Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
☐	eSuite User Profiles	☒		☒		☒			

UM Settings

Maintenance > Utility Management > UM Settings

The UM Settings page has been enhanced with the addition of a new section called **eUtilities** (see image below).

All settings related to eUtilities are collected under this section, including two new settings related to the eSuite Accounts pop-up window: **Using eUtilities** and **eSuite Profiles Endpoint**. These settings are described in the table below.

The **eSuite Address** and **Portal Home Page** settings are not new, but they have been relocated from the **eBills** section to the **eUtilities** section.

UM Settings

General

Work Flow

Accounts

Consumption

Bills

Receipts

Delinquencies

Adjustments

Work Orders

Deposits

Costs

Accounts to Bill

Bill Print Options

Print All Bills

Bill Inactive Accounts

☐

Bill Print

Pre-Calculated Penalty

☒

Show Detailed Charge Categories

☒

Show Parent Charge Categories

☐

Show Credit Effects of Deduction Meters

☐

Deduction Credit Title

Post Net

☐

Transaction with Consumption Information

☒

Include Consumption By Charge Category

☒

Include Consumption By Service Type

☐

Show Budget Bill Details

☒

Bill Export

Include Consumption Information

☒

Include TOU Summary Information

☐

Include Services

☐

Include Rates

☐

Bill Export File Type

Include Charge Category Detail

☒

Include Flat Charges on Meters

☐

Include Third Party Supporting Details

☐

Exclude Water Consumption

☐

Bill Print and Export Common Settings

Include Billing Items

☒

Include Consumption History For

General Billing Information

Payment Code

UT Payment - Utility Payment

User-Defined Field 1

User-Defined Field 2

User-Defined Field 3

User-Defined Field 4

User-Defined Field 5

Show Cost Adjustment

☐

Budget Billing

Title

Budget Billing

Revise Process Inactive Reason

Use Review Step in Revise Process

☒

Use Notify Step in Revise Process

☒

Rates

Prorate Rate Changes

☒

eUtilities

Using eUtilities

☒

eSuite Profiles Endpoint

testetsst

eSuite Address

https://trovmeleumint.corp.tylertechnologi

Portal Home Page

/default.aspx

eBills

Use eBills

☐

Activation Type

eSuite Activation

Delivery Type

Export

View Bill Page

/AccountSummary/

Complete Enrollment Page

/ebill?action=activate

Un-enroll Page

/ebill?action=deactivate

New Elements of the UM Settings Page

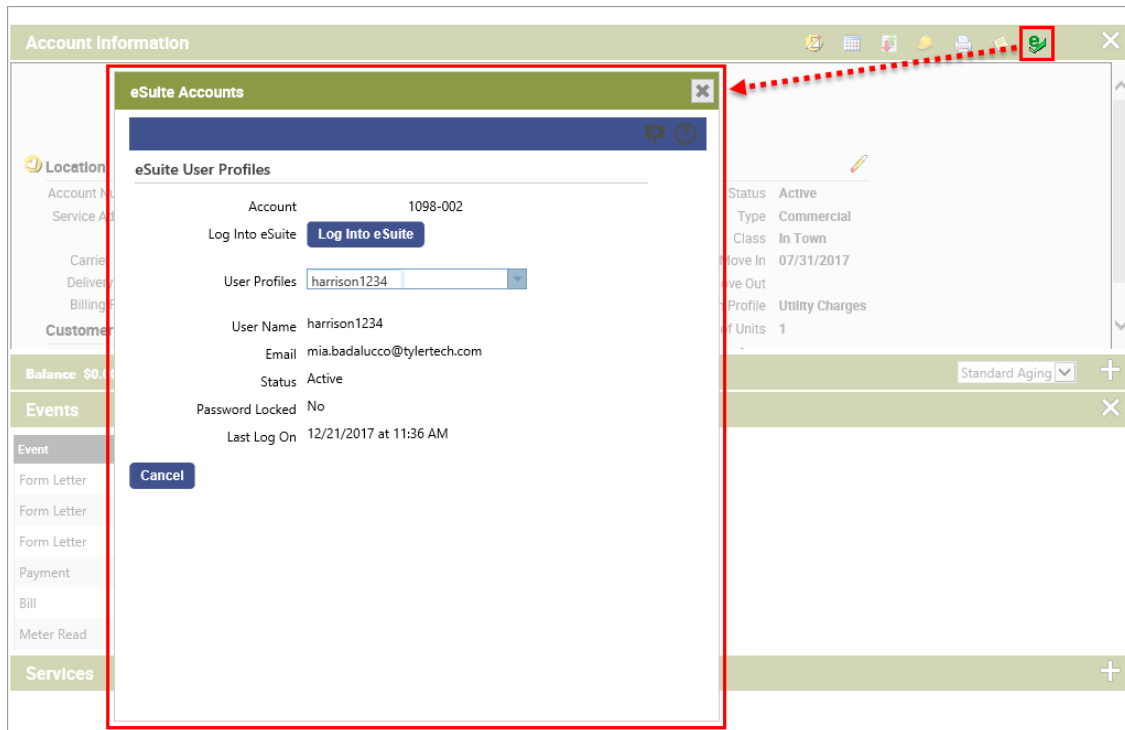
Name	Definition
Using eUtilities	This check box determines whether or not Utility Management users can view their eSuite customers' user account and profile information. If this check box is selected, the Log Into eSuite button on the eSuite Accounts pop-up window will be visible and enabled. If the check box is cleared, the Log Into eSuite button will <u>not</u> be visible.
eSuite Profiles Endpoint	This field is only required if eSuite services are installed on a machine other than the one on which the main NWERP website lives. If this is the case, you will enter a value similar to the following: https://[ServerName]/Services.UM.Security/ In the above scenario, this setting is used to point NWERP to the eSuite service used to obtain eSuite Utilities user information, such as last sign in time, and to facilitate the unlocking of user accounts that have been locked due to multiple failed login attempts.

Step-by-Step: Accessing a Customer's eSuite Account via Utility Management

1. In Utility Management, open **Customer Service**.
2. Open the account of the customer whose eSuite account you would like to access.
3. In the Account Information section, click the new **eSuite Accounts**  toolbar button located in the upper right-hand corner of the section.

The new eSuite Accounts pop-up window will open. This window displays the eSuite customer's basic profile information, including his **Account** number, **User Profiles** (if the account has multiple profiles, you can select among them via this drop-down control), **User Name**, **Email** address, and current **Status**. You will also see an indication of whether the customer's account password has been locked (**Password Locked**), as well as the last date and time at which they logged into the system (**Last Log On**).

For a more detailed description of the elements on this page, see the table below.



4. Click the **Log Into eSuite** button.

The eSuite application will open to the selected customer's eUtilities account, allowing you to view the account as the customer sees it when he or she is in eUtilities.

Elements in the eSuite Accounts Page

Name	Definition
Account	The identification number of the selected account.
Log Into eSuite	Clicking this button opens eSuite and the selected customer's eUtilities account.
User Profiles	By default, the User Profiles field displays the account's default user profile. If there are multiple user profiles associated with an account, the User Profile drop-down list will list them all. Selecting a different user profile will refresh the pop-up window and display information specific to the selected user.
User Name	The user name associated with the selected user profile.
Email	The email address associated with the selected user profile.

Elements in the eSuite Accounts Page

Name	Definition
Status	This field will read either Active, Pending, or Locked. Active means the user's account is active. A Pending status indicates that the customer has not yet validated his or her eSuite sign in and must do so to access their eSuite account. Locked means the account is locked (see Password Locked below).
Password Locked	Indicates whether or not the user's eSuite password has been locked. An account will be automatically locked if the user enters their password incorrectly too many times. If it is locked, the Unlock button will appear next to the field. Clicking it will unlock the customer's account, allowing them to sign in.
Last Log On	Indicates the date and time at which the user was last logged into eSuite.

eUtilities

eUtilities Enhancements in 2018.1

In 2018.1, multiple enhancements have been made within New World ERP eUtilities. Many of these enhancements revolve around **eSuite user authentication**. These improvements give the user a more typical login experience, making it easier for them to log into eUtilities, create and save their sign-in credentials, and, should they ever forget them, recover their sign-in credentials.

Important: As a result of these enhancements, after your system has been updated to 2018.1, **every eUtilities user will have to create a "user profile" before they can sign back into eUtilities**. As this will no doubt cause some confusion among your citizen customers, all related changes are described in detail below.

Also, in **Utilities Management Customer Service**, new functionality has been added to allow Customer Service Representatives (CSR) and other authorized personnel to easily log into and view customer eUtilities accounts. In this way, CSRs can see exactly what the customer sees in eUtilities, making it easier to assist customers when they encounter problems with their eUtilities accounts.

This document is organized into four main sections:

I. **eSuite** (i.e., the Citizen experience)

[User Authentication](#)

[Creating an eUtilities User Profile](#)

[Resolving Forgotten Sign-In Credentials](#)

[eUtilities Menu Bar Enhancements](#)

[Maintaining a User Profile & Its Associated Accounts](#)

II. **eSuite Administration** (i.e., the Administrator experience)

[Administration Password Settings](#)

III. **New World ERP Administration**

[Email Templates](#)

IV. **Utility Management** (i.e., the Customer Service Representative experience)

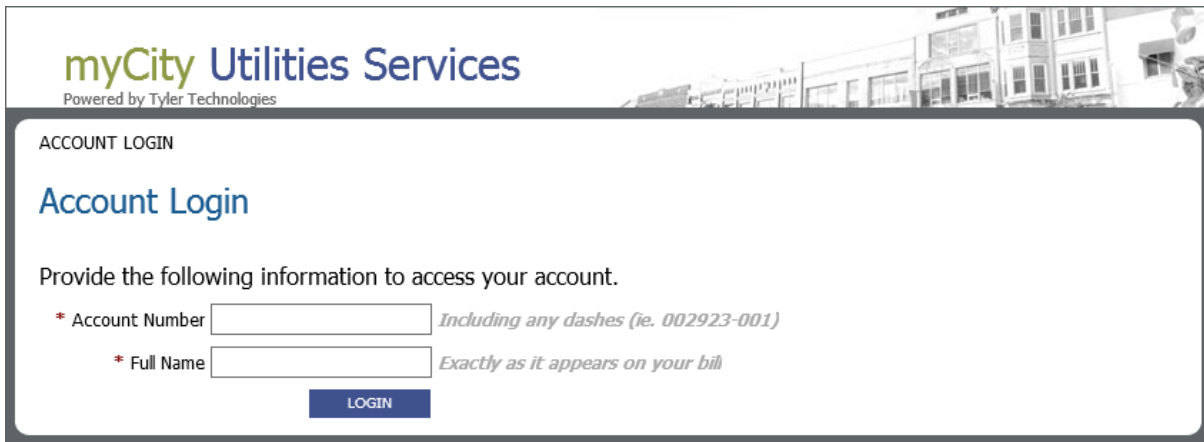
[Viewing a Customer's eSuite Account via Utility Management](#)

eSuite Enhancements - The Citizen Experience

User Authentication

The process of authenticating eUtilities users has been enhanced to make it easier for users to log into the system.

In earlier releases of the software, to log into eUtilities, users must enter their account number and up to six other authenticating criteria (e.g., Last Name, Full Name, Driver's License Number, etc.), depending on how the eUtilities system administrator configures the login process.



myCity Utilities Services
Powered by Tyler Technologies

ACCOUNT LOGIN

Account Login

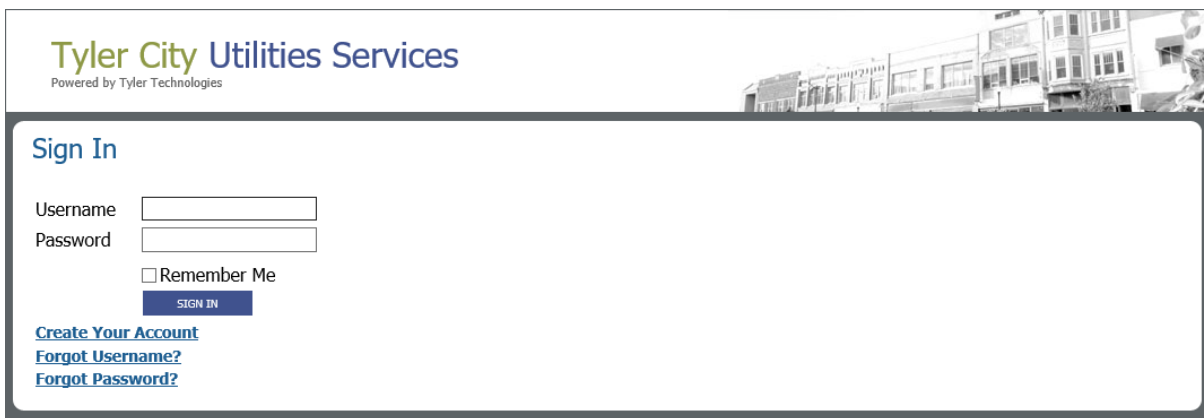
Provide the following information to access your account.

* Account Number Including any dashes (ie. 002923-001)

* Full Name Exactly as it appears on your bill

The eUtilities Account Login page before the 2018.1 update.

Starting in release 2018.1, users of eUtilities will be greeted with a more standard login screen, needing just a **Username** and **Password** to access their account online.



Tyler City Utilities Services
Powered by Tyler Technologies

Sign In

Username

Password

☐ Remember Me

[Create Your Account](#)

[Forgot Username?](#)

[Forgot Password?](#)

The user Sign In page after the 2018.1 update.

After your system is updated to New World ERP 2018.1, every eUtilities user must create a user profile before they can sign into eUtilities again. Creating a user profile is quick, easy, and described in detail below.



Note: Users will not be able to access eUtilities until they complete the process of creating a user profile.



Note: Because eUtilities administrators can customize the look and content of eSuite pages, the sample screen shots provided in this document may or may not match the screens you see in the software. However, the processes and fields described herein are common to all 2018.1 screens.

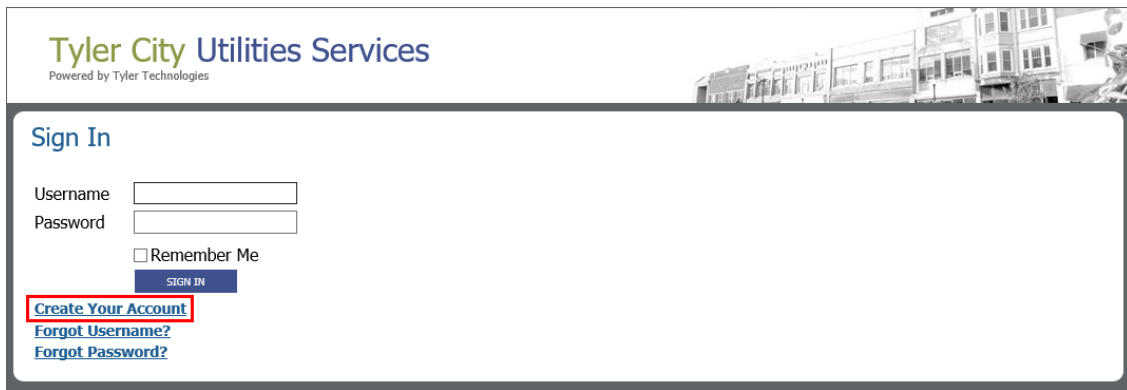
Creating an eUtilities User Profile

Immediately after your New World ERP system has been updated to 2018.1, customers will be unable to log into eSuite with their old sign-in credentials (i.e., credentials created in previous releases of the software). To regain access to eUtilities, users must verify their existing accounts and create new sign-in credentials. This is done by clicking the Create Your Account option on the eUtilities Sign In page and following the instructions.

To establish a user profile, do the following:

1. Open eUtilities. This will bring up the new **Sign In** page. When a user accesses this page for the first time after the 2018.1 update, they will not yet have the **Username** and **Password** required to access eUtilities. These will be created in the following steps.

Click **Create Your Account**.



2. The **Confirm Account** page will open. This page will resemble the user's pre-2018.1 sign-in screen. It will consist of the **Account Number** field and up to six additional identifying credentials, depending on how the eSuite administrator configured the page.

The user must identify their account by entering the appropriate values and clicking the **CONFIRM ACCOUNT** button.

Account log in message

Please create a user name and password for eUtilities.

Confirm account

Provide the following information to create an account.

* Account Number Including any dashes (ie. 002923-001)

* Last Name Your full last name

3. The **Activate Your Account** page will open. This page allows users to create their **new** sign-in credentials, i.e., the user name and password they will use to sign into eUtilities going forward.

All fields in this window are required. Make the necessary entries and click **REGISTER**.

Activate Your Account

Complete the form below to begin the account activation process.

Create Your Account

Username

Password

Confirm Password

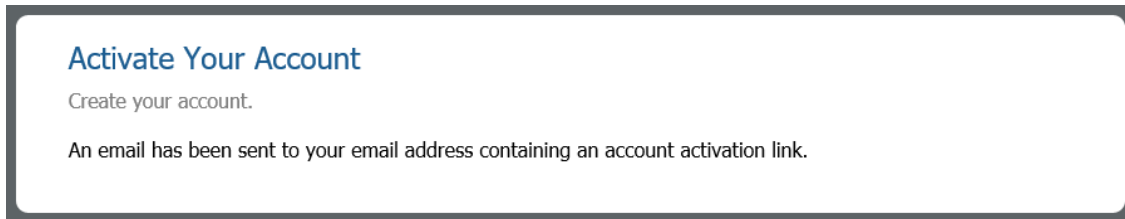
Email

Confirm Email

Field descriptions:

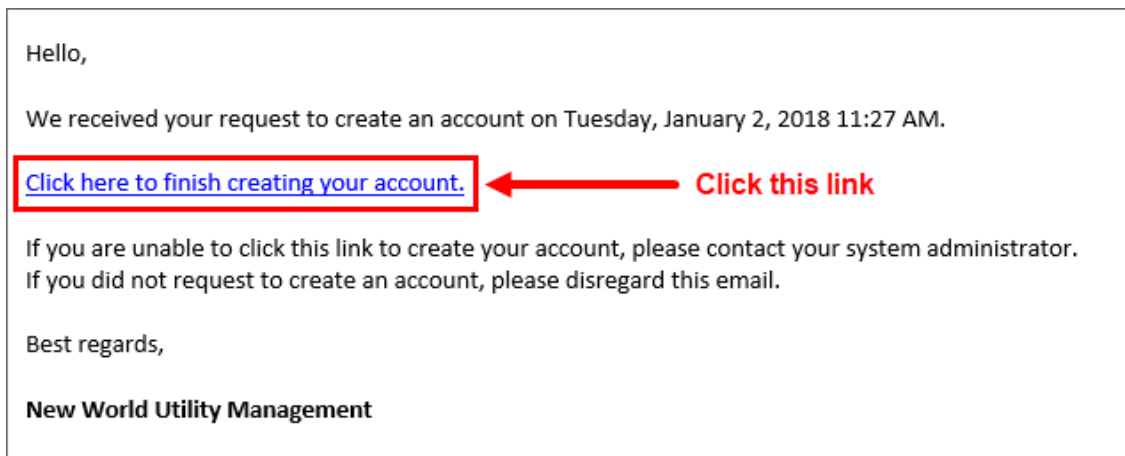
- » **Username** - The user name that will be used to access the account. This field must be unique.
- » **Password** - The password that will be used to access the account.
- » **Confirm Password** - The **Password** re-entered to ensure correct spelling.
- » **Email** - The user's email address. This is required to process password resets. Should a user forget their password, it can be reset via an automated email exchange. The email address must be unique. No two user profiles can share the same email address.
- » **Confirm Email** - The **Email** re-entered to ensure correct spelling.

4. The following window will display:

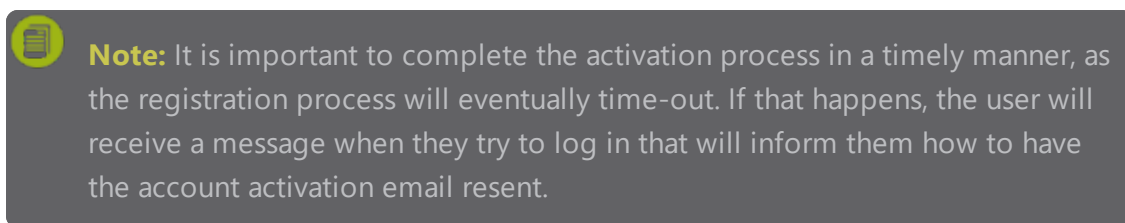


At this point, the user should check their email. They will receive an email message with a subject line similar to the following: **"eSuite UM Account Creation Requested."**

It could take several minutes for the email message to arrive, but when it does, the user must open it and click the link located in the body of the message (shown below).



Only by clicking this link will the activation process be completed. If the user does not click this link, the user's account will remain inactive and they will not be able to access their eUtilities account.



5. At the new Sign In page, the user can now do the following:

- a. Enter their new **Username** and **Password**, i.e., the credentials created in step 3 above.
- b. If they would like this page to remember their **Username**, i.e., to retain that value for future sign-in sessions, they can select the **Remember Me** check box. Otherwise, they can leave this check box unchecked.



Note: For security reasons, the password will not be retained.

- c. Click **SIGN IN**.

Sign In

Username

Password

☐ Remember Me

SIGN IN

[Create Your Account](#)
[Forgot Username?](#)
[Forgot Password?](#)

6. The **Account Summary** page will open (i.e., the default page for the customer's account), thus completing the customer account activation process.

308 HEIN DR
20057-007
 \$323.66 ▼

Account Summary
 Account Details ▼
 Payments ▼
 eBill Enrollment
 User Profile ▼

The Utility can put **anything** they want here. And it has **robust** formatting. They can embed images and video (all though I chose not to demo that)

Account Summary

Billing Status

[View Bill](#) [Make a Payment](#)

Balance on Last Bill	\$323.66
All Activity Since Last Bill	(\$323.66)
Total Due	\$0.00

Account Information

Account #	20057-007
Service Address	308 HEIN DR Troy, MI 48064

Resolving Forgotten Sign-In Credentials

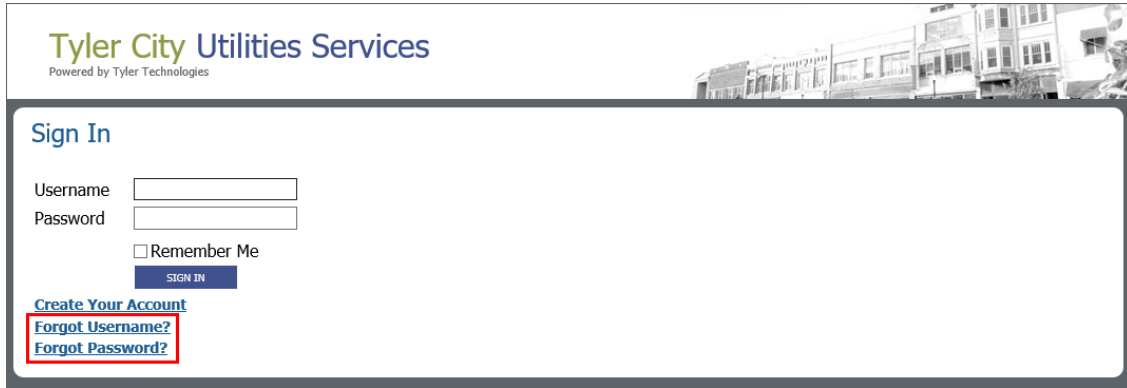
eUtilities > Sign-in page

Options on the Sign In page provide quick and easy solutions for users who forget their user name or password. The **"Forgot Username?"** option allows users to recover a forgotten user name. The **"Forgot Password?"** option will walk a user through resetting a forgotten password.

Forgotten Username

If a user forgets their user name, they must do the following to retrieve it:

1. On the Sign In page, click the **Forgot Username?** option.



Tyler City Utilities Services
Powered by Tyler Technologies

Sign In

Username

Password

☐ Remember Me

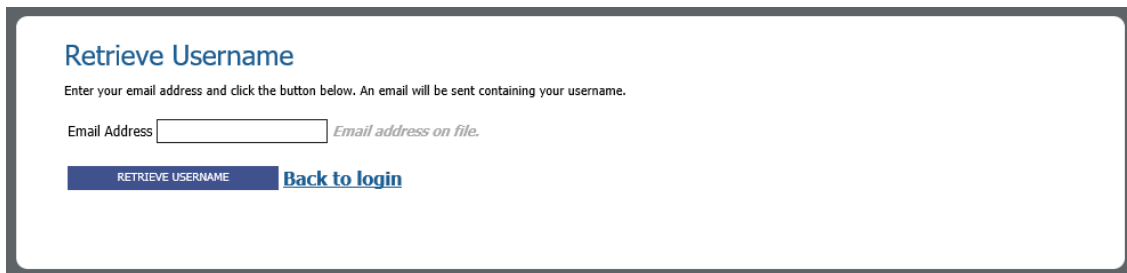
SIGN IN

[Create Your Account](#)

[Forgot Username?](#)

[Forgot Password?](#)

2. The **Retrieve Username** page will open. They will enter their **Email Address** and click **RETRIEVE USERNAME**.



Retrieve Username

Enter your email address and click the button below. An email will be sent containing your username.

Email Address *Email address on file.*

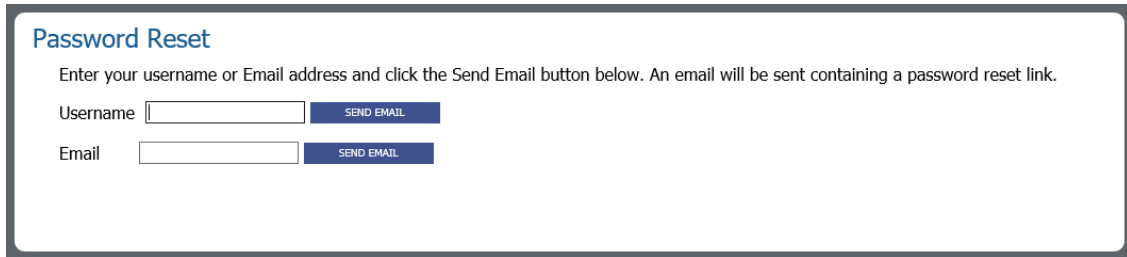
RETRIEVE USERNAME [Back to login](#)

3. An email message containing the user's Username will be sent to the specified address. They can then use it to sign into eUtilities.

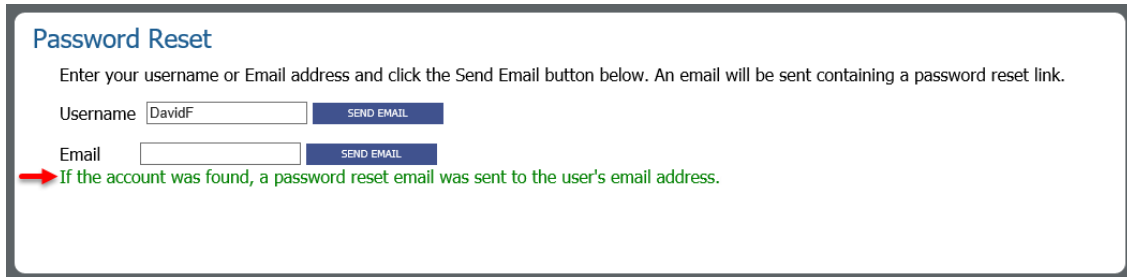
Forgotten Password

If a user forgets their password, they must do the following to reset it:

1. On the Sign In page, click the **Forgot Password?** option.
2. The Password Reset page will open. Here, the user must enter either their **Username** or **Email** address and then click **SEND EMAIL**.



A message will appear below the entry fields to inform the user that the "password reset email" has been sent.



3. When the user receives and opens the email message, they must click the "**Password Reset**" link within the message.



Note: The Reset Email will eventually expire, so this processes should be completed in a timely manner.

4. The Reset Password page will open. Here the user can enter and re-enter (for confirmation purposes) their **new** password.

Click **RESET PASSWORD**.

Reset Password

Enter the information below to select a new password.

New Password

Confirm New Password

RESET PASSWORD

- The user will be taken back to the eUtilities Sign In page where they can log in with their new password.

eUtilities Menu Bar Enhancements

Open eUtilities > Sign In

The eUtilities menu bar has been reorganized to make navigation within the software easier and more intuitive. All of the options that were previously available are still available, but related options have been grouped together in appropriately labeled drop-down lists.

308 HEIN DR
20057-007

\$323.66

Account Summary

Account Details

Payments

eBill Enrollment

User Profile

The Utility can put **anything** they want here. And it has **robust** formatting. They can embed images and video (all though I chose not to demo that)

Account Summary

Billing Status
[View Bill](#) [Make a Payment](#)
 Balance on Last Bill \$323.66
 All Activity Since Last Bill (\$323.66)
 Total Due \$0.00

Account Information
 Account # 20057-007
 Service Address 308 HEIN DR
 Troy, MI 48064

For example, the following options are now included in the **Account Details** drop-down list: View Bills, Consumption Analysis, and Account History. None of these options are new, they've just been reorganized under a common heading.

308 HEIN DR
20057-007

\$323.66

Account Summary

Account Details

Payments

eBill Enrollment

User Profile

The Utility can put **anything** they want here. And it has **robust** formatting. They can embed images and video (all though I chose not to demo that)

Account Summary

Billing Status
[View Bill](#) [Make a Payment](#)
 Balance on Last Bill \$323.66
 All Activity Since Last Bill (\$323.66)
 Total Due \$0.00

Account Information
 Account # 20057-007
 Service Address 308 HEIN DR
 Troy, MI 48064

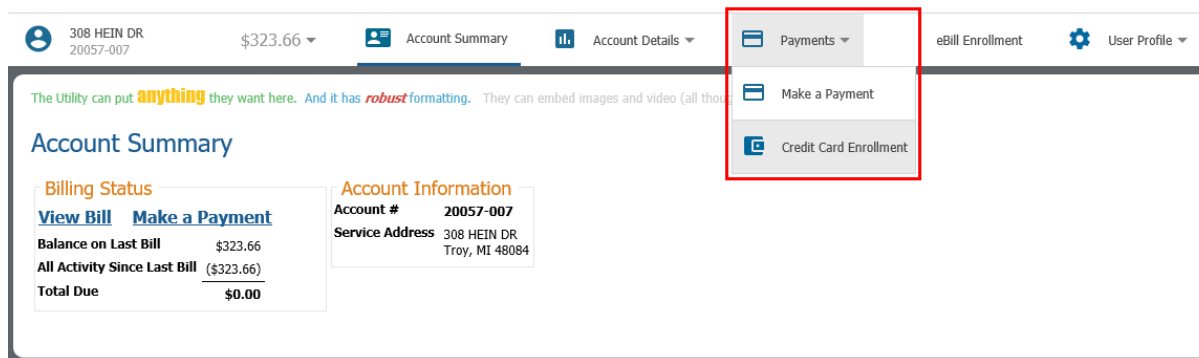
Account Details

View Bills

Consumption Analysis

Account History

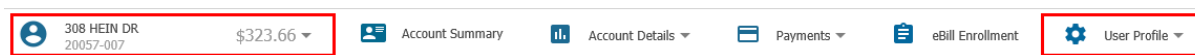
The **Payments** drop-down list includes the following options: Make a Payment and Credit Card Enrollment. Again, these options are not new, they've just be relocated under a common heading.



The screenshot shows the eUtilities interface for account 308 HEIN DR, 20057-007. The account balance is \$323.66. The 'Payments' dropdown menu is open, showing 'Make a Payment' and 'Credit Card Enrollment' options. The account summary shows a balance of \$323.66 and a total due of \$0.00.

Note: If **Credit Card Enrollment** is turned off in Maintenance, associated options will not be available via the menu.

The user profile-related features at either end of the menu bar make it easier for customers to view and maintain their user profile and associated accounts.



The screenshot shows the eUtilities menu bar. The 'User Profile' dropdown menu is highlighted with a red box.

For more information about these features, see [Viewing and Maintaining User Profiles and Associated Accounts](#) below.

Viewing and Maintaining a User Profile and its Associated Accounts

In eUtilities, enhancements have been made to make it easier for users to view and manage their user profile and associated accounts.

The user identifies their **primary account** during the initial eUtilities account activation process (see [Creating an eUtilities User Profile](#) above). Once the primary account is successfully activated, the user can associate any number of additional accounts to their profile. This allows them to view information about all of their associated accounts from the same place and within the same login session.

The unlabeled **Account** drop-down control at the left end of the menu bar and the **User Profile** drop-down at the opposite end of the menu bar provide access to the new features described in this section.

308 HEIN DR
20057-007 \$323.66 ▼

Account Summary

Account Details ▼

Payments ▼

eBill Enrollment

User Profile ▼

The Utility can put **anything** they want here. And it has **robust** formatting. They can embed images and video (all though I chose not to demo that)

Account Summary

Billing Status

[View Bill](#) [Make a Payment](#)

Balance on Last Bill	\$323.66
All Activity Since Last Bill	(\$323.66)
Total Due	\$0.00

Account Information

Account #	20057-007
Service Address	308 HEIN DR Troy, MI 48064

Maintaining a User Profile

Sign into eUtilities > User Profile > Profile Maintenance

The User Profile page (shown below) allows users to maintain their eUtilities password and email address. Their email address is necessary for the password reset process, which allows users to reset a forgotten password.

User Profile

User Name	JohnS
Current Password	
New Password	
Confirm Password	
Email	john.smith@abc123.com
Confirm Email	

SAVE

The User Profile page.

To change their password, the user must do the following:

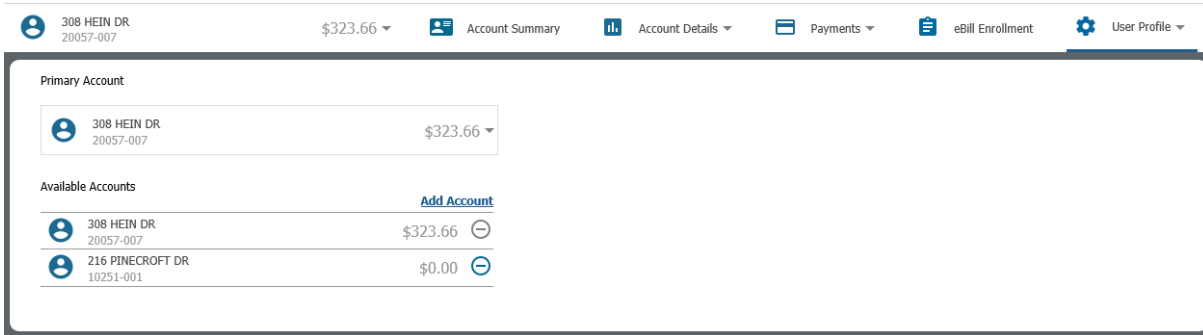
1. Enter their **Current Password**,
2. Enter their **New Password**,
3. Re-enter their new password in the **Confirm Password** field, and
4. Click **Save**.

Linked Accounts

Sign into eUtilities > User Profile > Linked Accounts

The Linked Accounts page (shown below) allows users to view a list of the accounts that are associated with their profile. All accounts and their respective balances are listed in the **Available Accounts** section.

From this page, users can also add accounts to their user profile (see [Adding an Account](#)), change their primary account (see [Changing the Primary Account](#) below), and remove accounts from their profile (see [Removing an Account](#)).



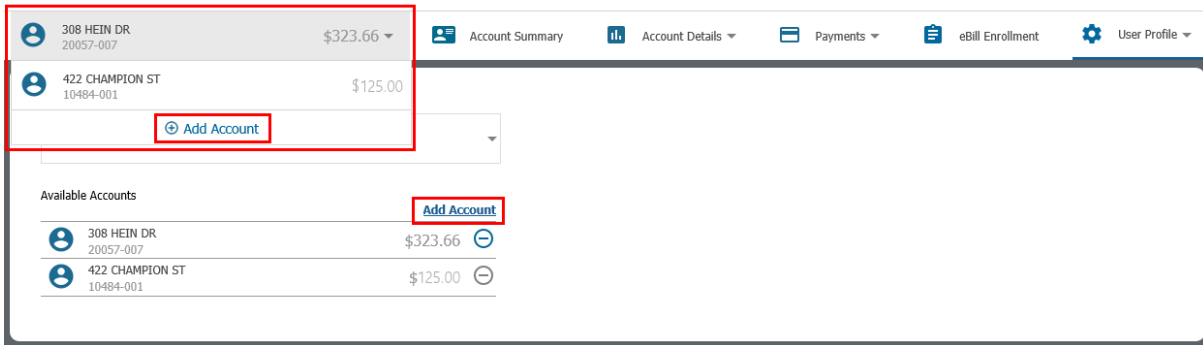
The screenshot shows the 'User Profile' page. At the top, there's a navigation bar with icons for Account Summary, Account Details, Payments, eBill Enrollment, and User Profile. Below this, the 'Primary Account' section displays a dropdown menu with '308 HEIN DR 20057-007' selected, showing a balance of '\$323.66'. Below the primary account, the 'Available Accounts' section has an 'Add Account' button at the top. It lists two accounts: '308 HEIN DR 20057-007' with a balance of '\$323.66' and '216 PINECROFT DR 10251-001' with a balance of '\$0.00'.

The Linked Accounts page.

Adding an Account

Sign into eUtilities > User Profile > Linked Accounts > Click the Add Account button

Users can add an associated account to their user profile by clicking one of the **Add Account** buttons on the Linked Accounts page. There are two Add Account buttons, one at the bottom of the **Account** drop-down list and another at the top of the **Available Accounts** section. Both buttons work the same way (see [Step-by-Step: Adding an Account to a User Profile](#) below).



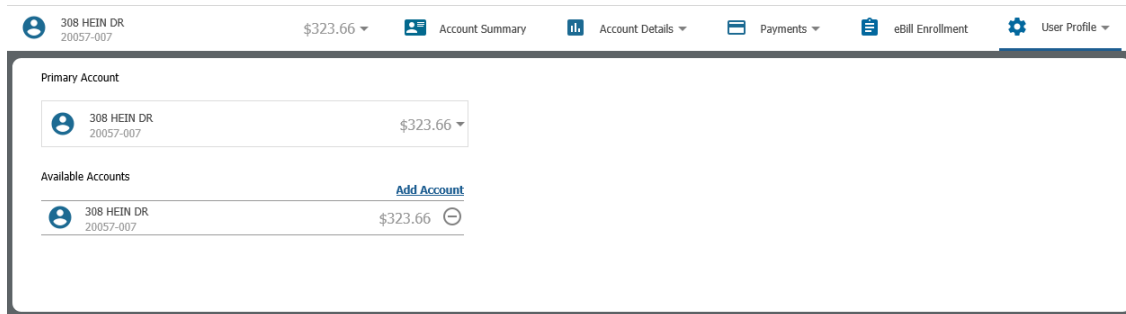
This screenshot is similar to the previous one but highlights the 'Add Account' buttons. A red box around the primary account dropdown shows the 'Add Account' button at the bottom. Another red box around the 'Available Accounts' section highlights the 'Add Account' button at the top. The 'Available Accounts' list now includes '422 CHAMPION ST 10484-001' with a balance of '\$125.00'.

The user can add as many accounts as is necessary. Once an account is added it will display in the **Account** drop-down list (shown in the screen shot above). From there the account can be selected for viewing. Once an account is selected, all features in eUtilities will pertain to that account. For example, the Account Summary page will display summary information pertaining to the selected account; making a payment via the Make a Payment page will transact against the selected account, etc.

In this way, the user can toggle between all of their accounts.

Step-by-Step: Adding an Account to a User Profile

1. On the Linked Accounts page, click the **Add Account** button in the Available Accounts section.

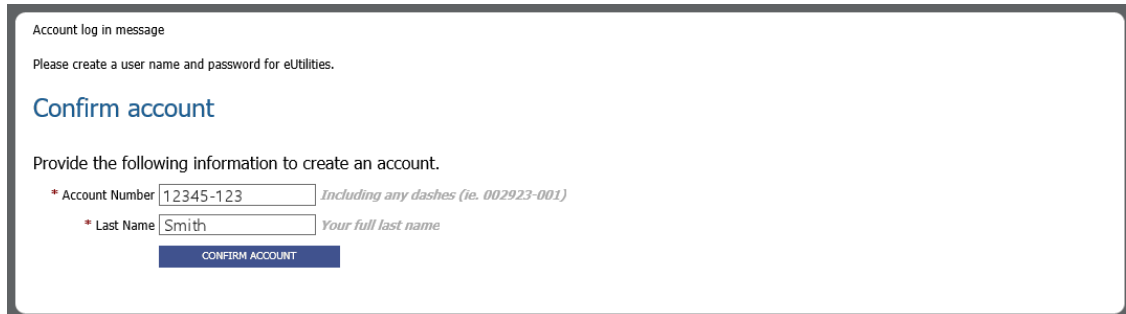


The screenshot shows the 'User Profile' page. At the top, there's a navigation bar with icons for Account Summary, Account Details, Payments, eBill Enrollment, and User Profile. Below this, the 'Primary Account' section shows a single account: '308 HEIN DR 20057-007' with a balance of '\$323.66'. The 'Available Accounts' section shows the same account with a blue 'Add Account' button next to it.



Note: You can also add an account by clicking the **Add Account** button at the bottom of the **Account** drop-down list. Both **Add Account** buttons work the same way.

2. The Confirm account window will open.



The screenshot shows the 'Confirm account' window. It has a title 'Confirm account' and a subtitle 'Provide the following information to create an account.' Below this, there are two input fields: '* Account Number' with the value '12345-123' and a note 'Including any dashes (ie. 002923-001)', and '* Last Name' with the value 'Smith' and a note 'Your full last name'. At the bottom, there is a blue button labeled 'CONFIRM ACCOUNT'.

Do the following:

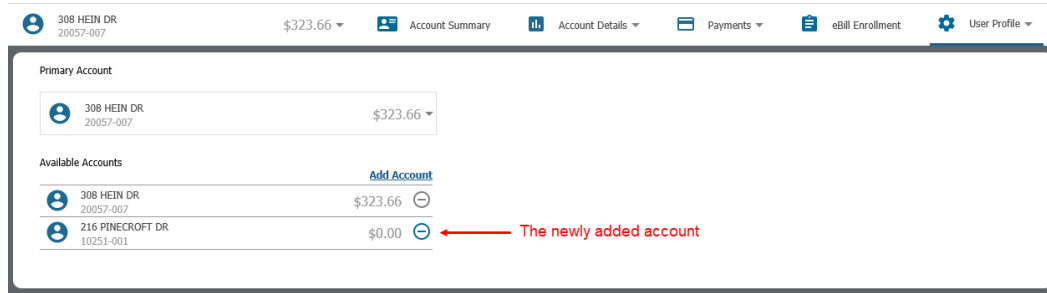
- a. Enter the **Account Number** associated with the account you are adding.
- b. Enter all other identifying criteria for the account.



Note: The required criteria that displays on this page will vary based on how the system administrator set up the login requirements.

- c. Click **CONFIRM ACCOUNT**.

The account will then be added to the user profile. Now, when a user clicks the (unlabeled) **Account** drop-down control, both the primary account and the newly added account will appear in the drop-down list. Any number of accounts can be added in this way. Clicking an account in the list will open that account for viewing.



308 HEIN DR 20057-007 \$323.66 Account Summary Account Details Payments eBill Enrollment User Profile

Primary Account

308 HEIN DR 20057-007 \$323.66

Available Accounts [Add Account](#)

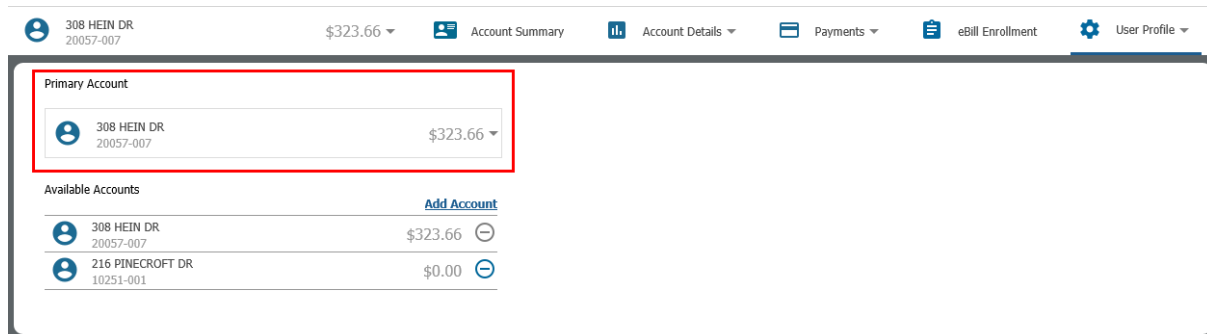
308 HEIN DR 20057-007 \$323.66

216 PINECROFT DR 10251-001 \$0.00 ← The newly added account

Changing the Primary Account

The **Primary Account** section displays the user's current primary account and its balance. The primary account is initially determined during account activation when the user identifies and activates their account. After that, the user can add as many accounts as he likes.

Clicking the **Primary Account** drop-down control displays a list of all associated accounts. Selecting an account from this drop-down list makes it the user's primary account. The primary account is the default account, the account that displays when a user first signs into eUtilities.



308 HEIN DR 20057-007 \$323.66 Account Summary Account Details Payments eBill Enrollment User Profile

Primary Account

308 HEIN DR 20057-007 \$323.66

Available Accounts [Add Account](#)

308 HEIN DR 20057-007 \$323.66

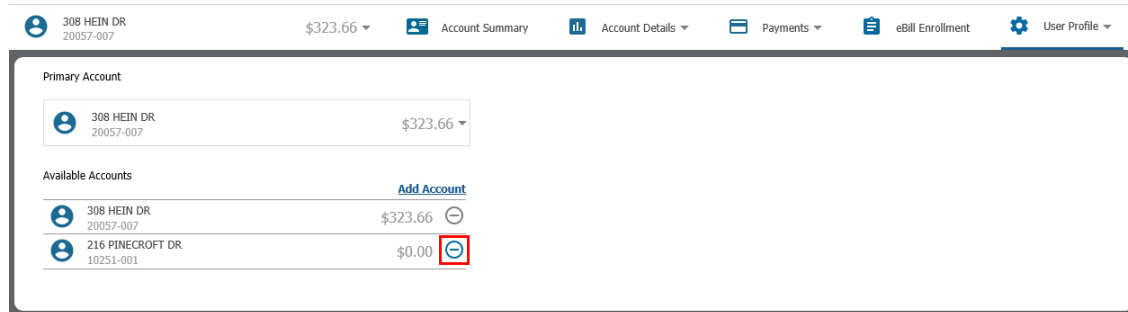
216 PINECROFT DR 10251-001 \$0.00

Removing an Account

Each account listed on the Linked Accounts page has an associated **Remove** button. Clicking an account's **Remove** button removes the account from the user profile.

1. In eUtilities, select **User Profile > Linked Accounts**. The Linked Accounts page will open listing all of the accounts associated with the user profile.
2. In the **Available Accounts** section, locate the account you would like to remove from the user profile and click its associated **Remove Account**  button.

The account will then be removed. It will no longer appear in the Linked Accounts page or the Account drop-down list.



 **Note:** The primary account cannot be removed from a user profile. Notice in the above screen shot the primary account is listed in both the **Primary Account** and **Available Accounts** sections. In the latter, the **Remove Account** button is disabled (i.e., grayed out); clicking it does nothing. To remove a primary account, a different account must first be made primary (see [Changing the Primary Account](#)). Only then can the previously "primary" account be removed.

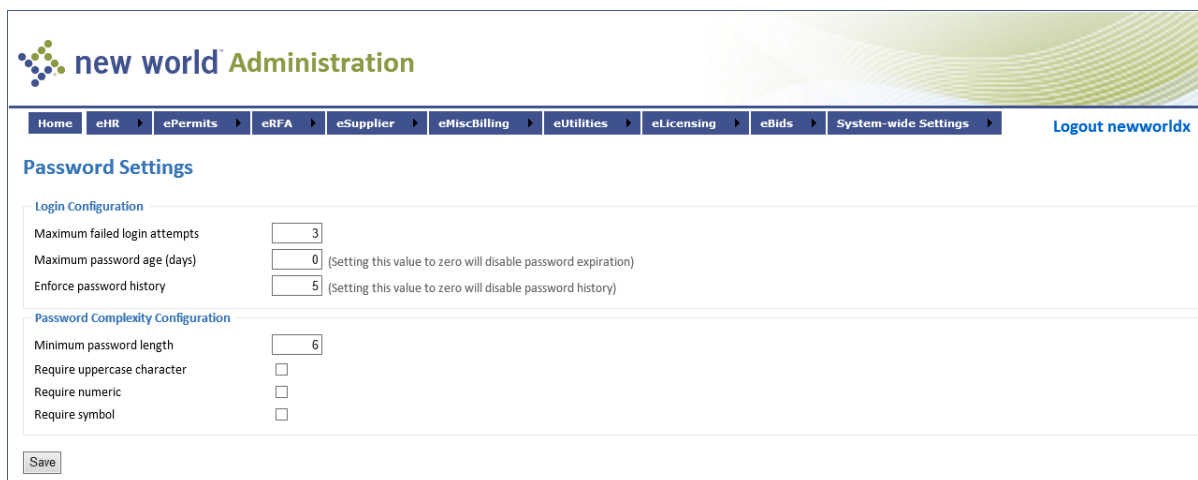
eSuite Administration Enhancements

This section pivots away from eSuite and the citizen experience to eSuite Administration. The eSuite administrator must perform a one-time setup of password related settings that will govern the citizen sign-in experience.

Password Settings

eSuite Admin > System-wide Settings > Password Settings

In eSuite Administration, all of the settings in the **Password Complexity Configuration** section of the Password Settings page are now required (see image below). If any of these fields are left blank, then whenever an eUtilities customer tries to create a password that does not meet all of these requirements, the attempted password creation will fail and an error message will display for the customer.



Also, the settings in the **Login Configuration** section are shared between UM administration and HR administration. When defining user password requirements, therefore, it is important to find a balance between UM and HR best practices.

If a user enters the wrong **Username** more than the number of times defined via the **Maximum failed login attempts** field, the user's browser will be automatically locked. At that point, the user will have to close their browser, reopen it, and try again.

If, on the other hand, the user enters the wrong **Password** more than the number of times defined via the **Maximum failed login attempts** field, their user account/profile will be **locked**. At that point, the user has two options: 1) call and ask their utility to unlock their account/profile ([Accessing a User's eSuite Account via Utility Management](#)), or 2) unlock it themselves via the **Forgot Password** feature (see [Resetting a User's Password](#)).

New World ERP Administration

This section describes the email templates used in the various eSuite User Profiles processes, and the maintenance required to customize the templates to your organizations preferences.

Email Templates

new world ERP Suite > System > Email Templates > Application: Utility Management
> Module: eSuite User Profiles

There are four different outbound email messages related to eSuite User Profile processes. Although they all come with default text messages, administrators will want to modify the

text to reflect their organization's preferences. Moreover, the **From Address** for each template must be changed to the appropriate email address, i.e., one that matches your organization's domain.

The four templates are:

1. Forgot Password
2. Profile Information Updated
3. User Profile Registration Confirm Email Address
4. Username Recovery Email



Note: For more information about email templates, please click the Help button on the Email Template Setup page in New World ERP.

Utility Management Enhancements

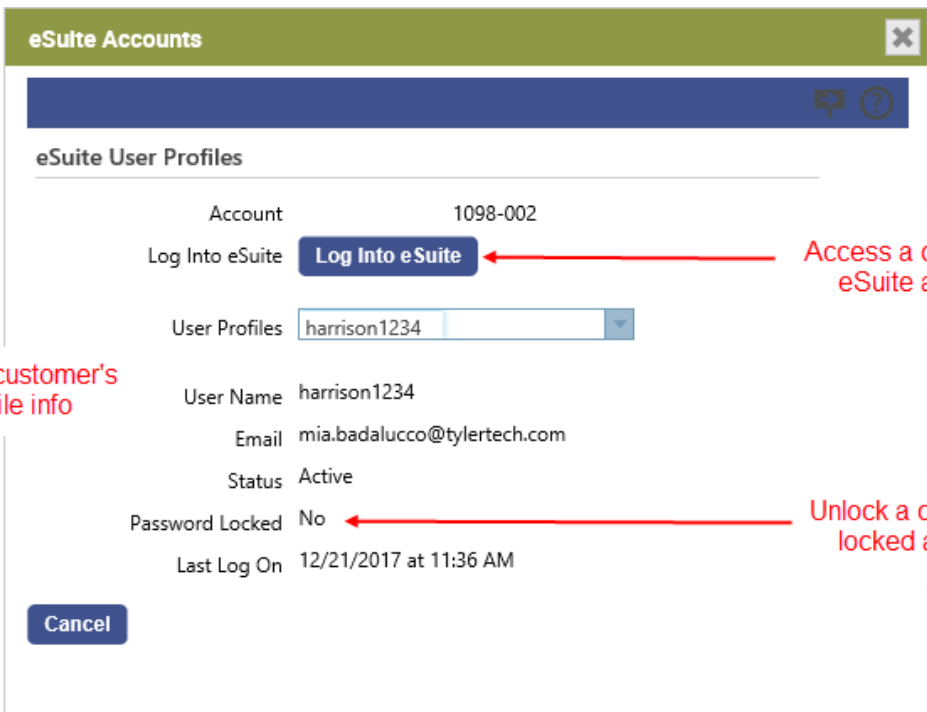
Viewing a Customer's eSuite Account via Utility Management

This section describes how customer service representatives (CSRs) using New World ERP Utility Management can leverage new functionality to better serve their eUtilities customers. Primary among the new enhancements is the CSR's ability to quickly and easily access a customer's eUtilities account.

The new functionality discussed in this section is all provided through the new **eSuite Accounts pop-up window** (shown below). This window allows CSRs to do the following:

1. **View a Customer's eSuite Account** (as mentioned above). When working with a citizen customer, it's often beneficial for a CSR to see exactly what the customer is looking at and referring to in eUtilities. In earlier releases of the software, CSRs could do this by using flexible credentials. With the 2018.1 release, CSRs can no longer access eSuite in that way. However, new functionality in Customer Service has been added to allow CSRs to easily log into and view a given customer's eSuite account and see exactly what the customer is looking at.
2. **View useful account and profile-related information.** Has a user profile been set up for a given account? If so, has just one profile or multiple profiles been set up for the account? Has anyone accessed eSuite via a given user profile? When was the last time a user accessed an account? CSRs can leverage this new functionality to answer these questions and more.

3. **Unlock a user account.** When a citizen customer attempts to sign into eSuite and incorrectly enters their password too many times, they can get locked out of their account. CSRs now have the ability to unlock a user's account with a click of the mouse.



The screenshot shows the 'eSuite Accounts' window with a green header and a blue bar with a search icon and a help icon. Below the header is the 'eSuite User Profiles' section. It displays the following information:

- Account: 1098-002
- Log Into eSuite: **Log Into eSuite** (button) — *Access a customer's eSuite account*
- User Profiles: harrison1234 (dropdown menu) — *View a customer's profile info*
- User Name: harrison1234
- Email: mia.badalucco@tylertech.com
- Status: Active
- Password Locked: No — *Unlock a customer's locked account*
- Last Log On: 12/21/2017 at 11:36 AM
- Cancel (button)

For detailed instructions on accessing the eSuite Accounts window, see [Step-by-Step: Viewing a Customer's eSuite Account via Utility Management](#) below.

Before you can take advantage of these new features, however, some system setup is required. See [Setup](#) for details.

Setup

System Security

Maintenance > new world ERP Suite > Security > Users > Select the appropriate user

The new **eSuite User Profiles** security component has been added to provide security over the eSuite Accounts pop-up window. Available permissions include **View** and **Change**. Assigning full permission gives the New World ERP user the ability to open the eSuite Accounts pop-up window (described above) and utilize the features within, including viewing a customer's account in eSuite and unlocking a locked eSuite account.

Permissions								
☐	Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout Finalize
☐	eSuite User Profiles	☒		☒		☒		

UM Settings

Maintenance > Utility Management > UM Settings

The UM Settings page has been enhanced with the addition of a new section called **eUtilities** (see image below).

All settings related to eUtilities are collected under this section, including two new settings related to the eSuite Accounts pop-up window: **Using eUtilities** and **eSuite Profiles Endpoint**. These settings are described in the table below.

The **eSuite Address** and **Portal Home Page** settings are not new, but they have been relocated from the **eBills** section to the **eUtilities** section.

UM Settings

General ▾ Work Flow ▾ Accounts ▾ Consumption ▾ Bills ▾ Receipts ▾ Delinquencies ▾ Adjustments ▾ Work Orders ▾ Deposits ▾ Cou

Accounts to Bill

Bill Print Options Print All Bills ▾

Bill Inactive Accounts ☐

Bill Print

Pre-Calculated Penalty ☒

Show Detailed Charge Categories ☒

Show Parent Charge Categories ☐

Show Credit Effects of Deduction Meters ☐

Deduction Credit Title

Post Net ☐

Transaction with Consumption Information ☒

Include Consumption By Charge Category ☒

Include Consumption By Service Type ☐

Show Budget Bill Details ☒

Bill Export

Include Consumption Information ☒

Include TOU Summary Information ☐

Include Services ☐

Include Rates ☐

Bill Export File Type

Include Charge Category Detail ☒

Include Flat Charges on Meters ☐

Include Third Party Supporting Details ☐

Exclude Water Consumption ☐

Bill Print and Export Common Settings

Include Billing Items ☒

Include Consumption History For

General Billing Information

Payment Code UT Payment - Utility Payment ▾

User-Defined Field 1

User-Defined Field 2

User-Defined Field 3

User-Defined Field 4

User-Defined Field 5

Show Cost Adjustment ☐

Budget Billing

Title Budget Billing

Revise Process Inactive Reason

Use Review Step in Revise Process ☒

Use Notify Step in Revise Process ☒

Rates

Prorate Rate Changes ☒

eUtilities

Using eUtilities ☒

eSuite Profiles Endpoint testetsst

eSuite Address https://trovmeleumint.corp.tylertechnologi

Portal Home Page /default.aspx

eBills

Use eBills ☐

Activation Type eSuite Activation ▾

Delivery Type Export ▾

View Bill Page /AccountSummary/

Complete Enrollment Page /ebill?action=activate

Un-enroll Page /ebill?action=deactivate

New Elements of the UM Settings Page

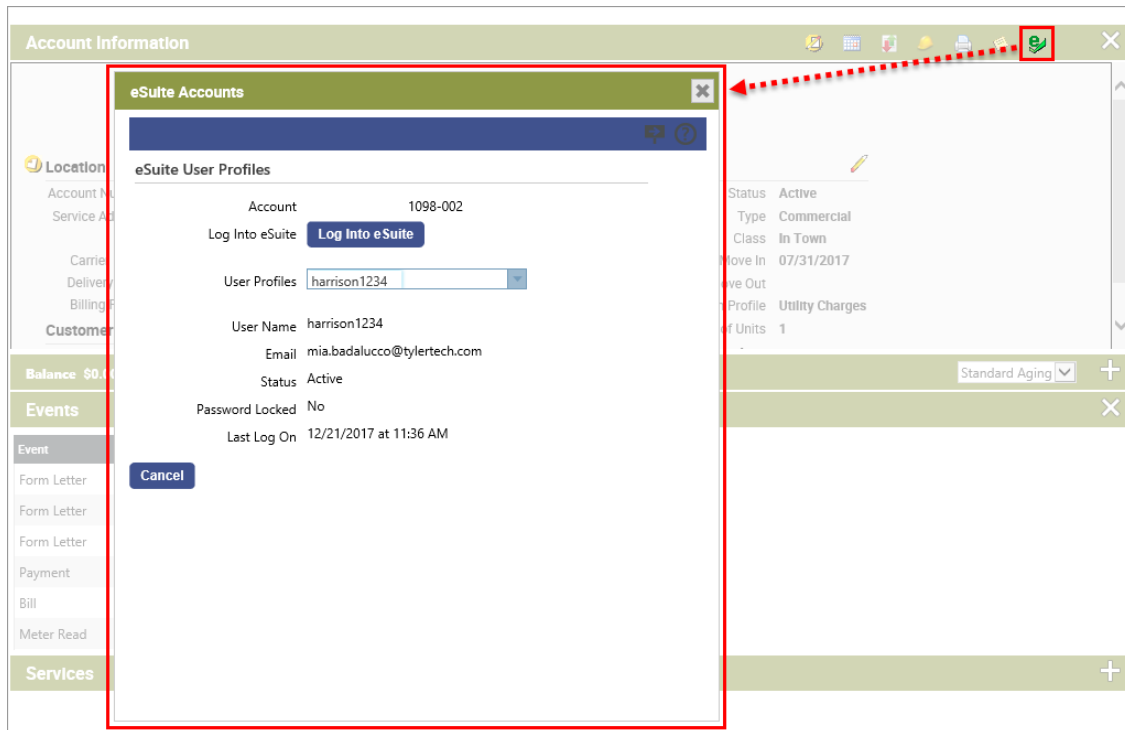
Name	Definition
Using eUtilities	This check box determines whether or not Utility Management users can view their eSuite customers' user account and profile information. If this check box is selected, the Log Into eSuite button on the eSuite Accounts pop-up window will be visible and enabled. If the check box is cleared, the Log Into eSuite button will <u>not</u> be visible.
eSuite Profiles Endpoint	This field is only required if eSuite services are installed on a machine other than the one on which the main NWERP website lives. If this is the case, you will enter a value similar to the following: https://[ServerName]/Services.UM.Security/ In the above scenario, this setting is used to point NWERP to the eSuite service used to obtain eSuite Utilities user information, such as last sign in time, and to facilitate the unlocking of user accounts that have been locked due to multiple failed login attempts.

Step-by-Step: Accessing a Customer's eSuite Account via Utility Management

1. In Utility Management, open Customer Service.
2. Open the account of the customer whose eSuite account you would like to access.
3. In the Account Information section, click the new **eSuite Accounts**  toolbar button located in the upper right-hand corner of the section.

The new eSuite Accounts pop-up window will open. This window displays the eSuite customer's basic profile information, including his **Account** number, **User Profiles** (if the account has multiple profiles, you can select among them via this drop-down control), **User Name**, **Email** address, and current **Status**. You will also see an indication of whether the customer's account password has been locked (**Password Locked**), as well as the last date and time at which they logged into the system (**Last Log On**).

For a more detailed description of the elements on this page, see the table below.



4. Click the **Log Into eSuite** button.

The eSuite application will open to the selected customer's eUtilities account, allowing you to view the account as the customer sees it when he or she is in eUtilities.

Elements in the eSuite Accounts Page

Name	Definition
Account	The identification number of the selected account.
Log Into eSuite	Clicking this button opens eSuite and the selected customer's eUtilities account.
User Profiles	By default, the User Profiles field displays the account's default user profile. If there are multiple user profiles associated with an account, the User Profile drop-down list will list them all. Selecting a different user profile will refresh the pop-up window and display information specific to the selected user.
User Name	The user name associated with the selected user profile.
Email	The email address associated with the selected user profile.

Elements in the eSuite Accounts Page

Name	Definition
Status	This field will read either Active, Pending, or Locked. Active means the user's account is active. A Pending status indicates that the customer has not yet validated his or her eSuite sign in and must do so to access their eSuite account. Locked means the account is locked (see Password Locked below).
Password Locked	Indicates whether or not the user's eSuite password has been locked. An account will be automatically locked if the user enters their password incorrectly too many times. If it is locked, the Unlock button will appear next to the field. Clicking it will unlock the customer's account, allowing them to sign in.
Last Log On	Indicates the date and time at which the user was last logged into eSuite.

System-Wide

ERP Suite

Approval Manager Enhancements

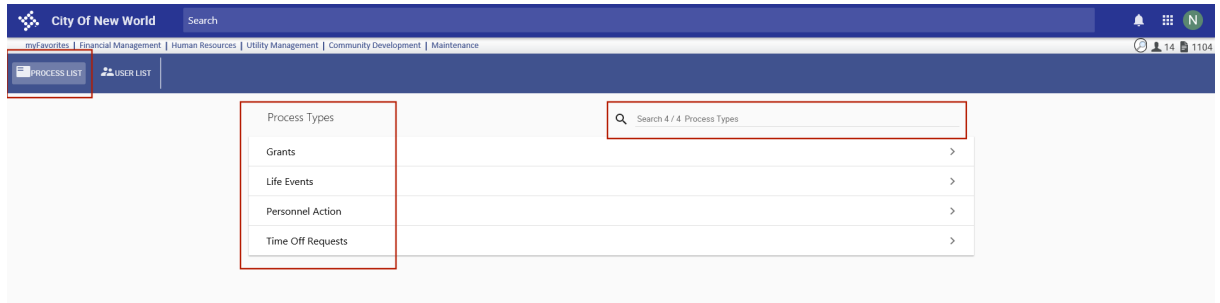
Maintenance > new world ERP Suite > Approval Manager

The Approval Manager page has been redesigned to give you a smoother, more intuitive workflow when creating and managing approval processes.

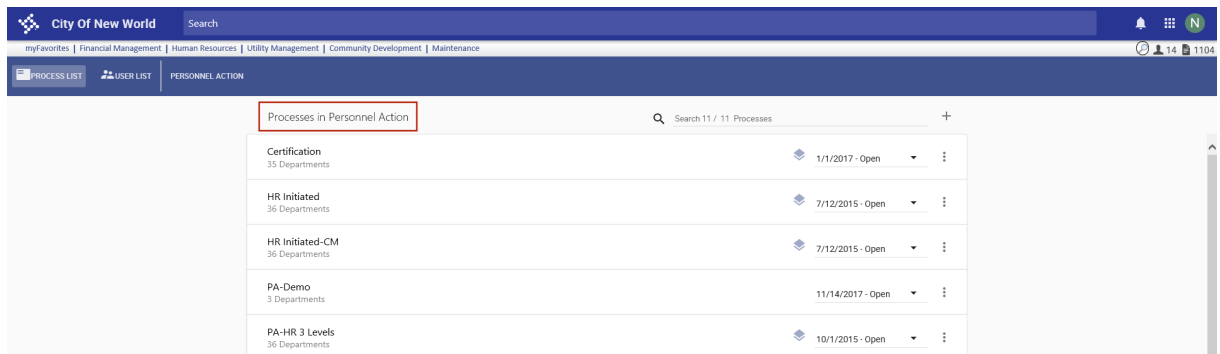
Creating an approval process involves setting up approval levels, associating departments with the process and, for each department, selecting users to approve at each level.

Creating an approval process

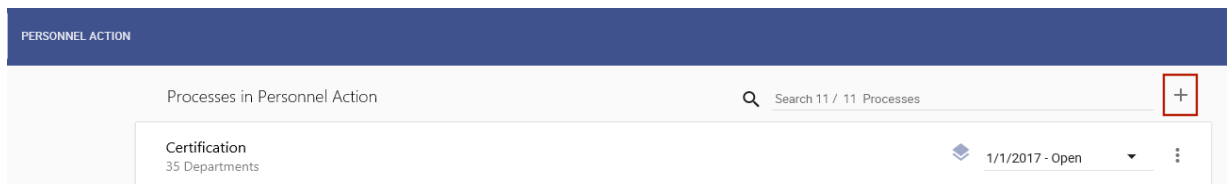
1. The default tab is the **PROCESS LIST**. All the available approval process types are listed alphabetically on individual cards.



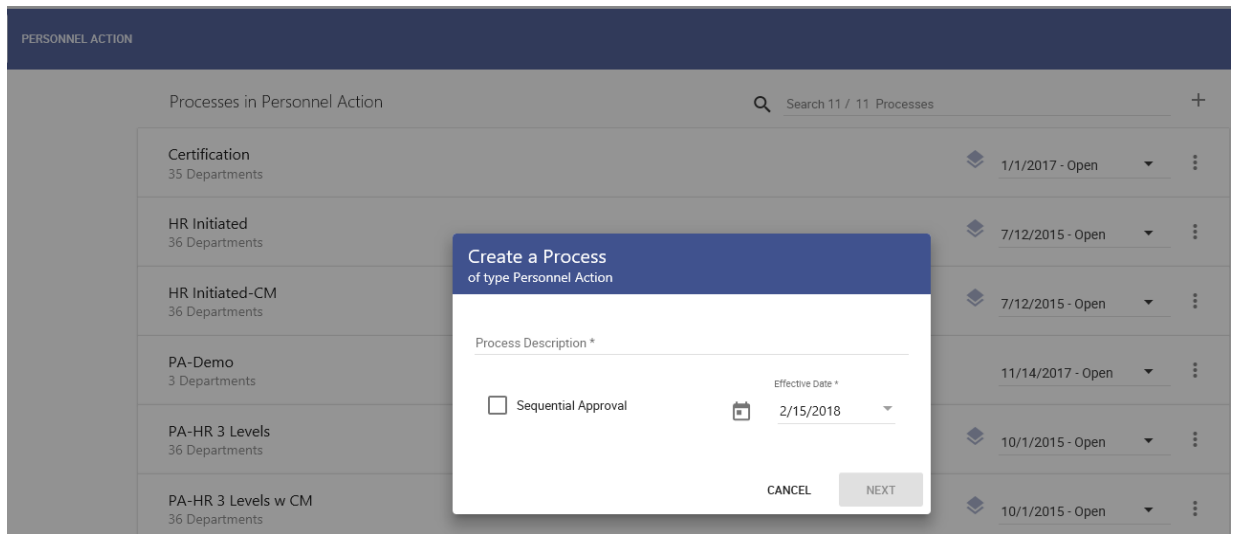
- Every page of the Approval Manager contains a search field. Use this field to find the process type you want.
- To view a **list of all processes** that have been set up for a process type, click the appropriate card. Processes also are listed alphabetically on individual cards.



- To create a process, click the **plus sign**  just above the card display on the right side.



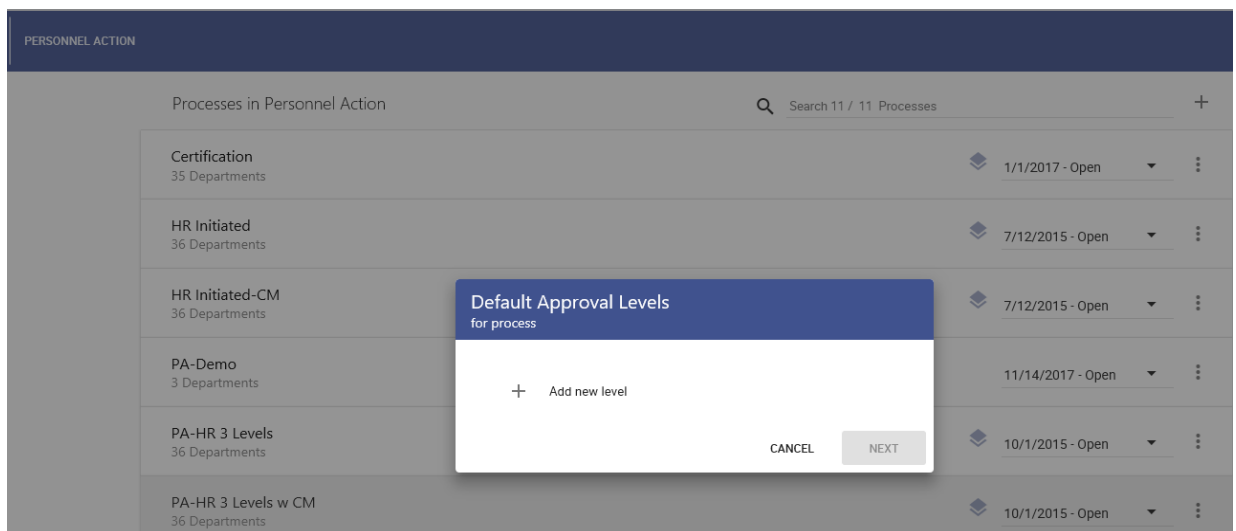
- The **Create a Process dialog** opens, asking for a description of the process, whether approvals will be sequential and the date the process becomes effective.



The screenshot shows the 'PERSONNEL ACTION' dialog with a list of processes. A modal titled 'Create a Process of type Personnel Action' is open. It contains a 'Process Description *' field, a 'Sequential Approval' checkbox, and an 'Effective Date *' dropdown set to '2/15/2018'. 'CANCEL' and 'NEXT' buttons are at the bottom right.

Process Name	Departments	Effective Date	Status
Certification	35 Departments	1/1/2017	Open
HR Initiated	36 Departments	7/12/2015	Open
HR Initiated-CM	36 Departments	7/12/2015	Open
PA-Demo	3 Departments	11/14/2017	Open
PA-HR 3 Levels	36 Departments	10/1/2015	Open
PA-HR 3 Levels w CM	36 Departments	10/1/2015	Open

6. Click **NEXT** to open the **Default Approval Levels dialog**.



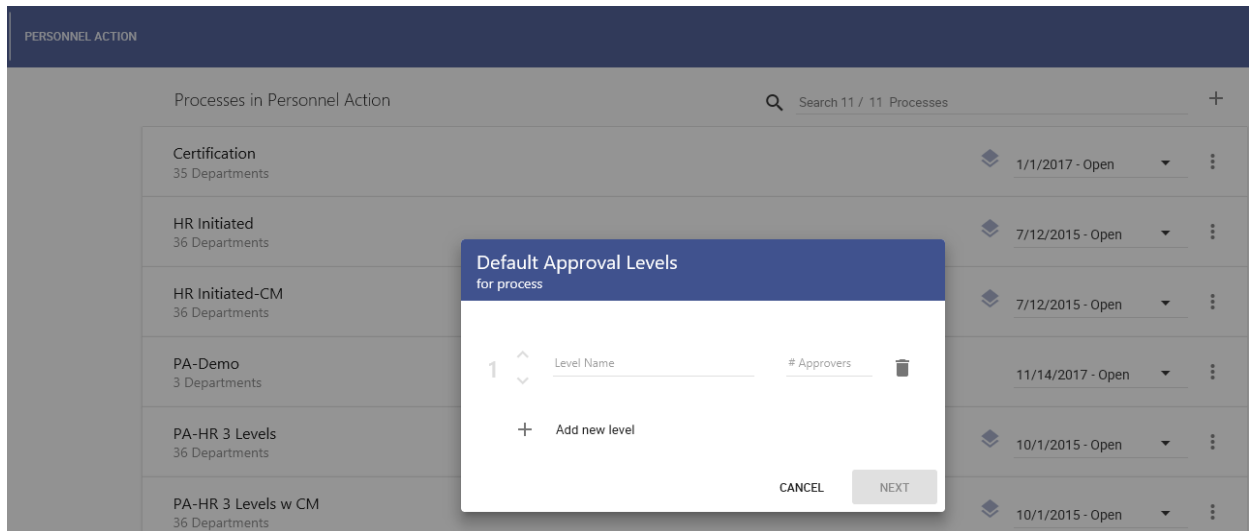
The screenshot shows the 'PERSONNEL ACTION' dialog with the same list of processes. A modal titled 'Default Approval Levels for process' is open. It features a '+ Add new level' button. 'CANCEL' and 'NEXT' buttons are at the bottom right.

Process Name	Departments	Effective Date	Status
Certification	35 Departments	1/1/2017	Open
HR Initiated	36 Departments	7/12/2015	Open
HR Initiated-CM	36 Departments	7/12/2015	Open
PA-Demo	3 Departments	11/14/2017	Open
PA-HR 3 Levels	36 Departments	10/1/2015	Open
PA-HR 3 Levels w CM	36 Departments	10/1/2015	Open

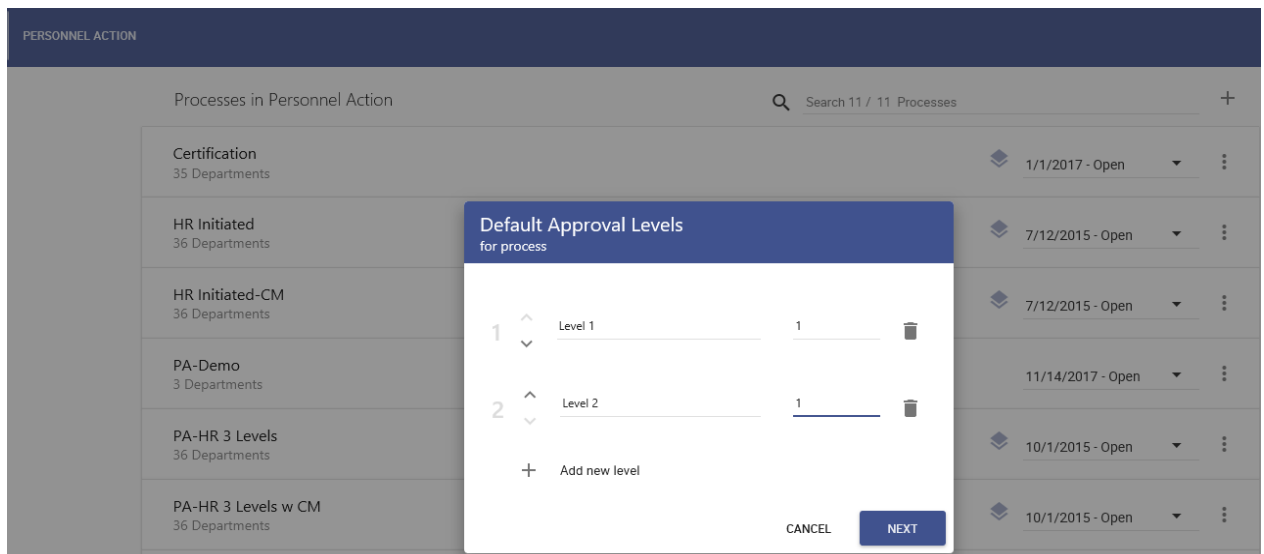


Note: The Default Approval Levels function lets you set up departments with default and custom approval levels.

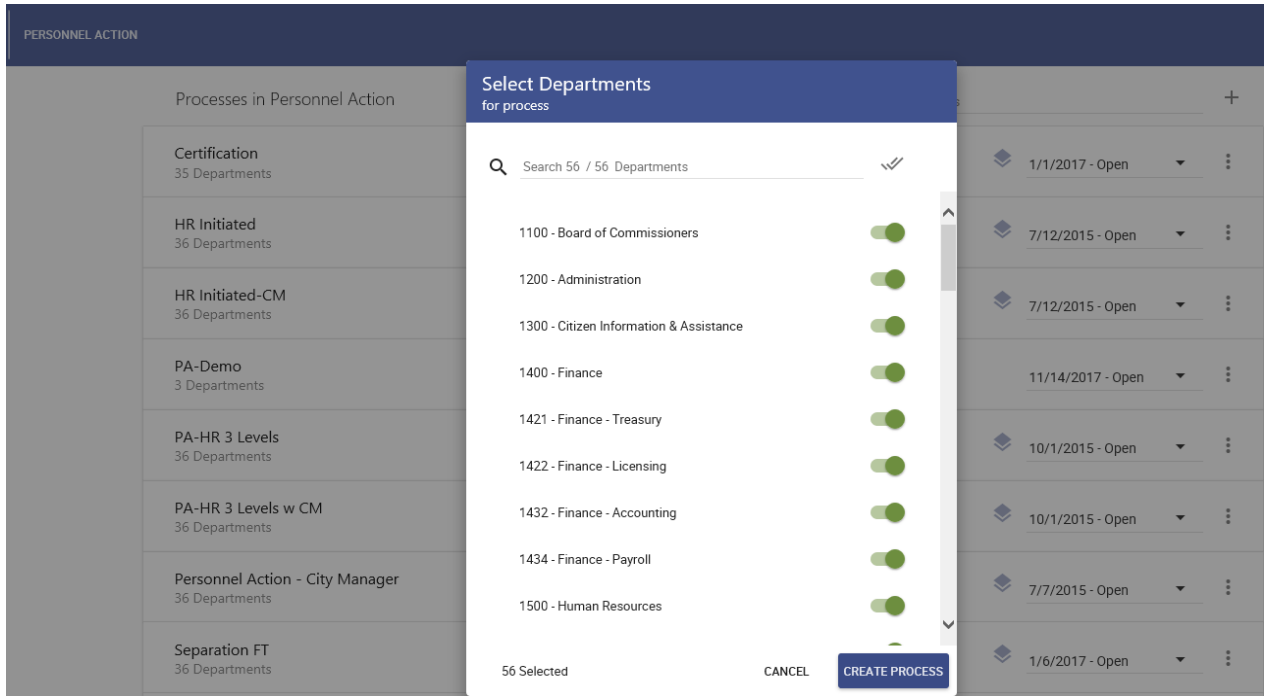
7. To add an approval level, click the plus sign **+** on the dialog. The **dialog expands** to include a field for the name of the first level and the number of approvers at that level.



8. To add a **second approval level**, click **Add new level**. You may add up to nine levels. To move a level up or down, click the caret symbol (^) to the left of the level description.



9. When finished, click the **NEXT** button. The **Select Departments dialog** opens.



PERSONNEL ACTION

Processes in Personnel Action

- Certification
35 Departments
- HR Initiated
36 Departments
- HR Initiated-CM
36 Departments
- PA-Demo
3 Departments
- PA-HR 3 Levels
36 Departments
- PA-HR 3 Levels w CM
36 Departments
- Personnel Action - City Manager
36 Departments
- Separation FT
36 Departments

Select Departments for process

Search 56 / 56 Departments

- 1100 - Board of Commissioners
- 1200 - Administration
- 1300 - Citizen Information & Assistance
- 1400 - Finance
- 1421 - Finance - Treasury
- 1422 - Finance - Licensing
- 1432 - Finance - Accounting
- 1434 - Finance - Payroll
- 1500 - Human Resources

56 Selected

CANCEL CREATE PROCESS

10. All departments are selected by default. The double check mark  near the top-right of the dialog lets you deselect and select all departments at once. You may **deselect all**, then scroll through the list to **select the departments** you want to associate with the approval process. By default, each department you select is associated with the same approval levels.

Select Departments
for process PA General

Search 56 / 56 Departments 

- 1100 - Board of Commissioners ☐
- 1200 - Administration ☐
- 1300 - Citizen Information & Assistance ☐
- 1400 - Finance ☐
- 1421 - Finance - Treasury ☐
- 1422 - Finance - Licensing ☐
- 1432 - Finance - Accounting ☐
- 1434 - Finance - Payroll ☐
- 1500 - Human Resources ☐

0 Selected CANCEL SAVE

Select Departments
for process PA General

Search 56 / 56 Departments 

- 1100 - Board of Commissioners ☒
- 1200 - Administration ☒
- 1300 - Citizen Information & Assistance ☒
- 1400 - Finance ☒
- 1421 - Finance - Treasury ☒
- 1422 - Finance - Licensing ☐
- 1432 - Finance - Accounting ☐
- 1434 - Finance - Payroll ☐
- 1500 - Human Resources ☐

5 Selected CANCEL SAVE

11. When finished, click the **CREATE PROCESS** button. The **approval process is created**, and the selected departments are listed on individual cards.

PERSONNEL ACTION

Processes in Personnel Action Search 12 / 12 Processes 

HR Initiated-CM
36 Departments  7/12/2015 - Open  

PA General 2/19/2018 - Open  

Departments Search 5 / 5 Departments 

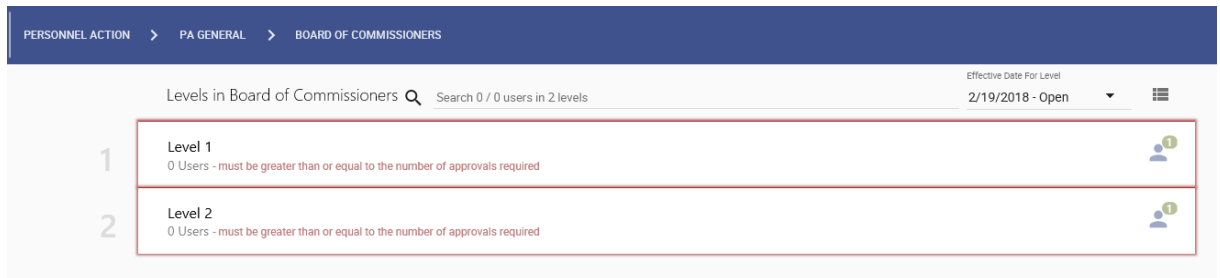
- 1100 - Board of Commissioners 
- 1200 - Administration 
- 1300 - Citizen Information & Assistance 
- 1400 - Finance 
- 1421 - Finance - Treasury 

By default, the approval level structure is copied to each department.

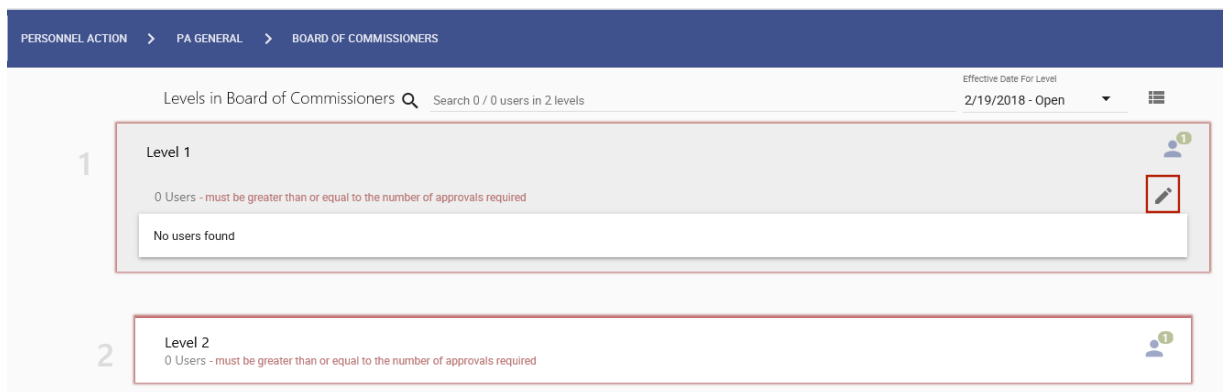
The next steps are to associate users in each department with approval levels.

Associating users with approval levels

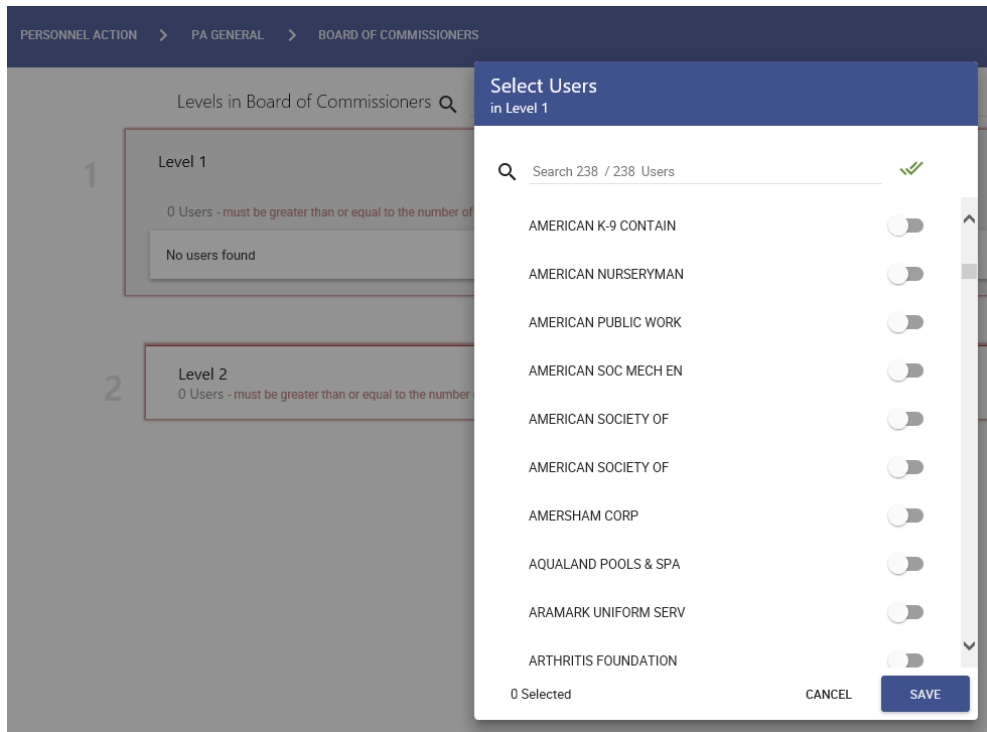
1. Click a department card to expand it. **Approval levels display as individual cards** containing the message that the number of users must be equal to or greater than the number of approvals required. The user icon  on the far-right of each card shows how many users are required to approve at that level.



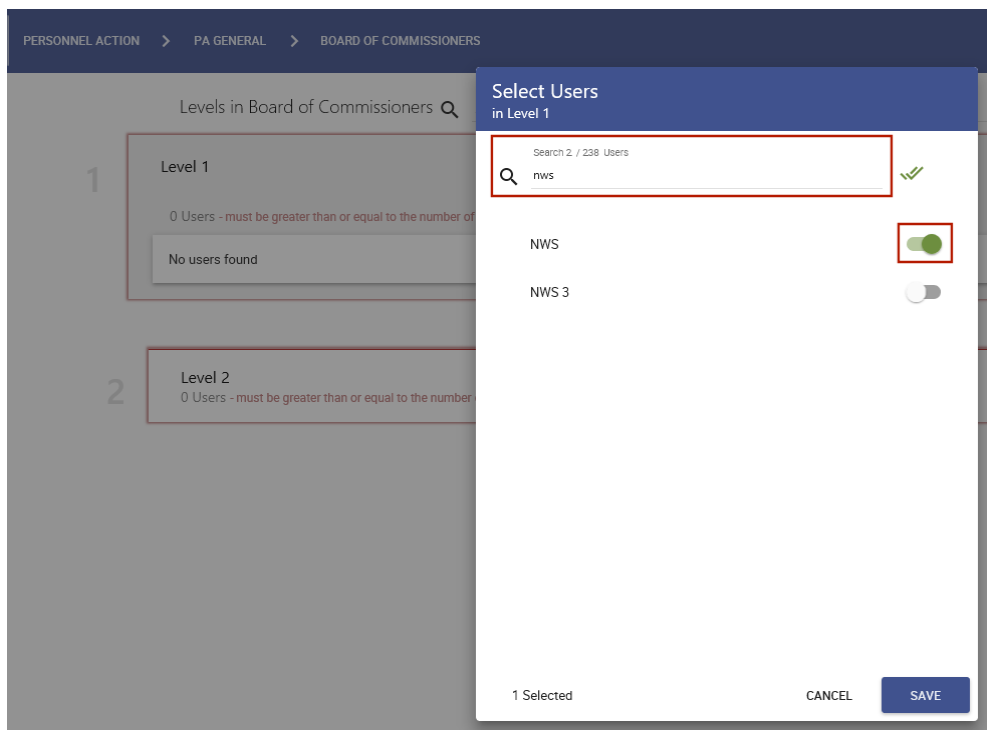
2. Click an approval level to **expand** it, and click the pencil icon .



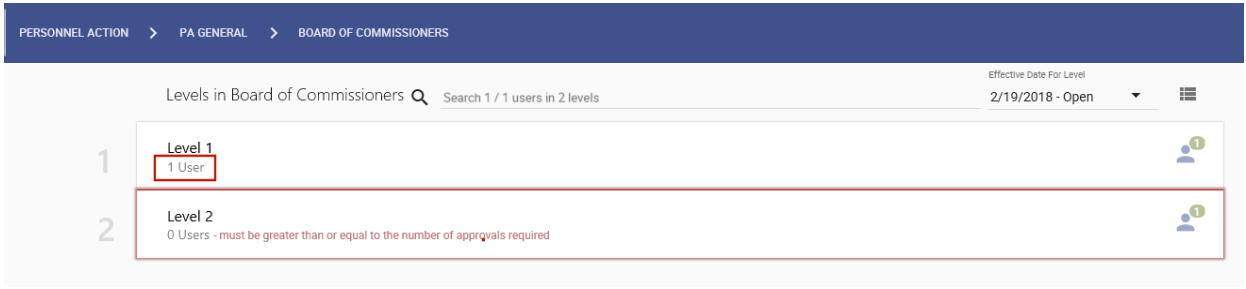
The **Select Users dialog** opens, with all users deselected by default.



3. Use the search field to find the user(s) you want for the selected level.
4. **Select the user(s)** who are to approve at this level.



- Click **SAVE**. The **user(s) are added** to the approval level.



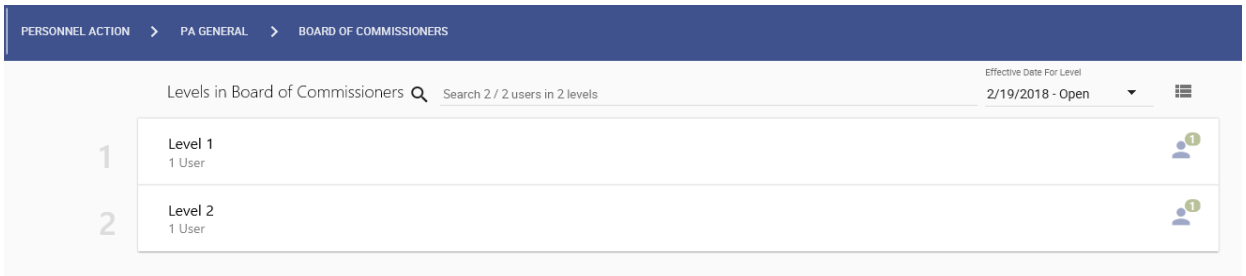
PERSONNEL ACTION > PA GENERAL > BOARD OF COMMISSIONERS

Levels in Board of Commissioners  Search 1 / 1 users in 2 levels

Effective Date For Level: 2/19/2018 - Open

1	Level 1 1 User	
2	Level 2 0 Users - must be greater than or equal to the number of approvals required	

- Repeat steps 2 through 5 for each approval level until all levels are **completed**.



PERSONNEL ACTION > PA GENERAL > BOARD OF COMMISSIONERS

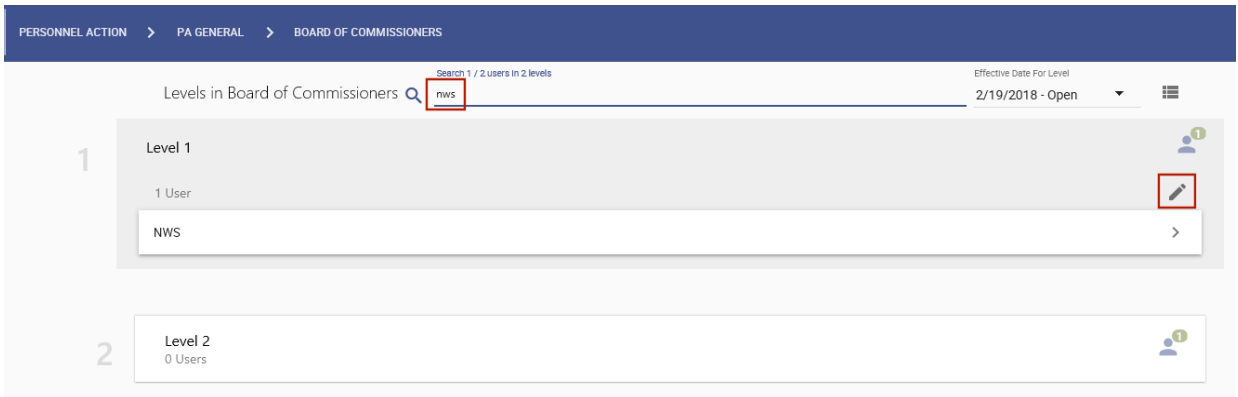
Levels in Board of Commissioners  Search 2 / 2 users in 2 levels

Effective Date For Level: 2/19/2018 - Open

1	Level 1 1 User	
2	Level 2 1 User	

Reviewing or removing a user from a level

- Type the user's name in the *Search* field at the top of the page. The card containing the user **expands**.



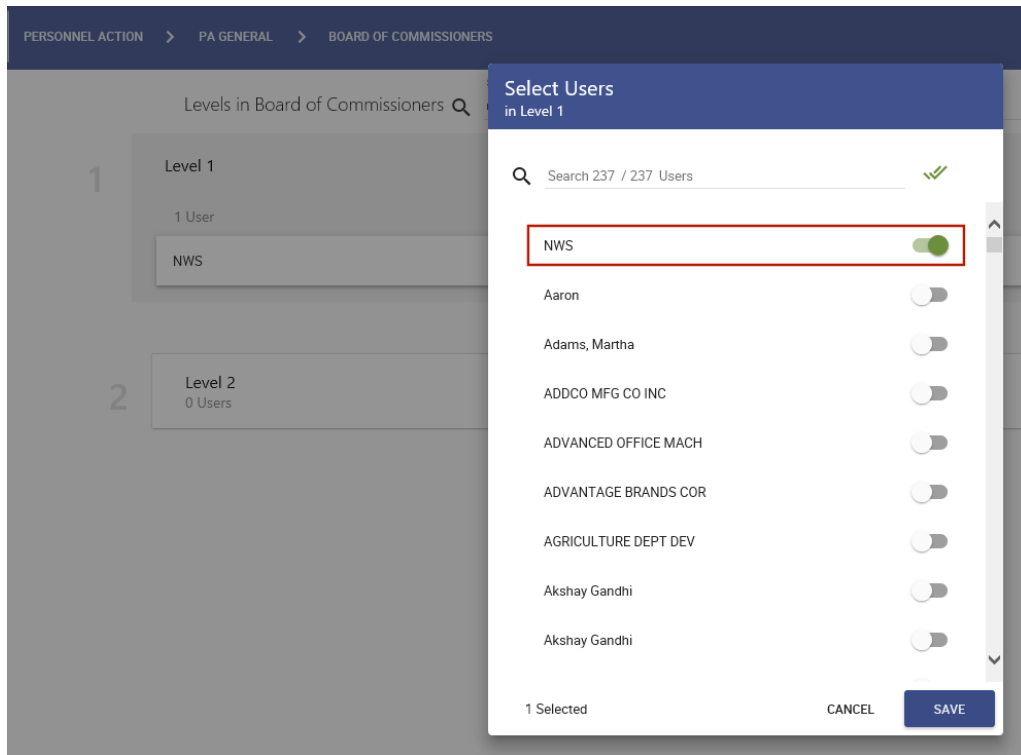
PERSONNEL ACTION > PA GENERAL > BOARD OF COMMISSIONERS

Levels in Board of Commissioners  Search 1 / 2 users in 2 levels

Effective Date For Level: 2/19/2018 - Open

1	Level 1 1 User	
	NWS	
2	Level 2 0 Users	

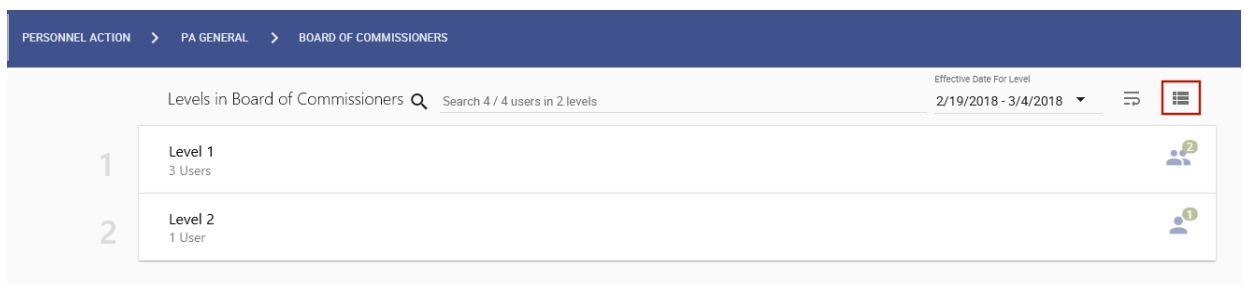
- Click the pencil icon  above the user's card to open the **Select Users dialog**.



3. Click in the user's row to remove the user as an approver.

Editing the level structure

1. To add, edit or remove a level or to reorder levels, click the **Edit Level Structure** menu  in the top-right of the page.



If you are editing a level set up as a default, a **warning dialog** displays to let you know you are creating a custom approval level structure for the selected department.

Editing Level Structure

Saving changes to the level structure will make this department follow a custom structure.

CONTINUE

- Click **CONTINUE**. The **Edit Approval Levels dialog** opens.

Edit Approval Levels

1	^ v	Level 1	2	
2	^ v	Level 2	1	
+ Add new level				

CANCEL **SAVE**

- Make your edits.
- Click **SAVE**.

Reverting to the default approval level structure

After you edit the approval level structure for a department, a **revert** icon  displays to the left of the Edit Level Structure menu to let you revert to the default level structure.

PERSONNEL ACTION > PA GENERAL > BOARD OF COMMISSIONERS

Levels in Board of Commissioners  Search 3 / 3 users in 2 levels

Effective Date For Level 2/19/2018 - Open 



1	Level 1 2 Users	
2	Level 2 1 User	

Revert to Default Level Structure

Clicking this icon opens a **warning dialog** to let you know that continuing will revert to the default level structure, removing changes and users from the department.

Revert to Default

Reverting back to the default level structure will remove changes and users from this department.

CANCEL

CONTINUE

If you have any departments with custom approval levels, a Custom Approval Levels icon  appears on the right side of the **card**.

PERSONNEL ACTION

Processes in Personnel Action

Search 1 / 12 Processes

pa general

+

PA General

2/19/2018 - Open

⋮

Departments

Search 5 / 5 Departments

✎

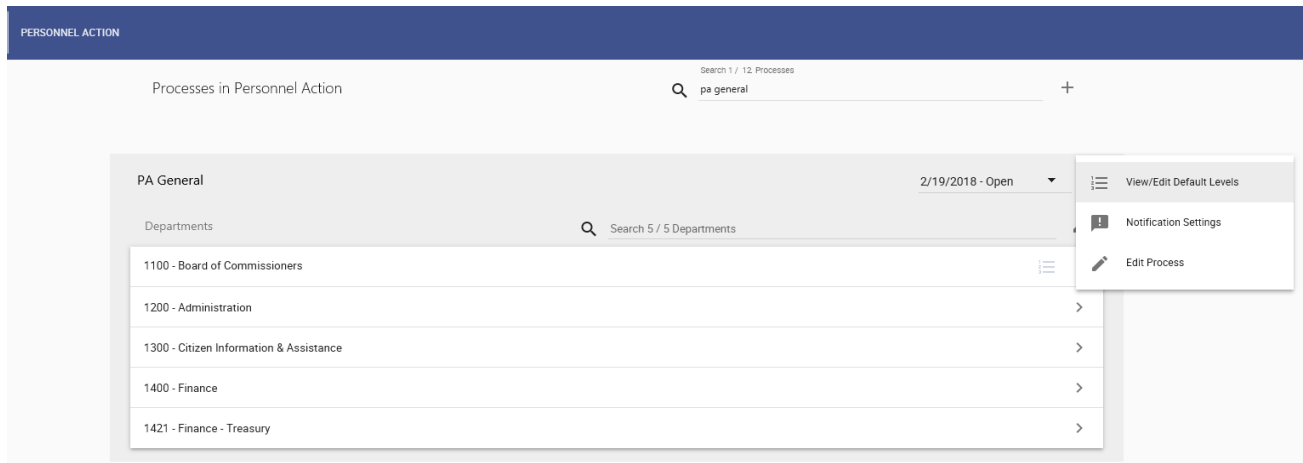
1100 - Board of Commissioners	 >
1200 - Administration	>
1300 - Citizen Information & Assistance	>
1400 - Finance	>
1421 - Finance - Treasury	>



Note: A department with custom approval levels maintains the custom-level structure unless you revert it to the default structure.

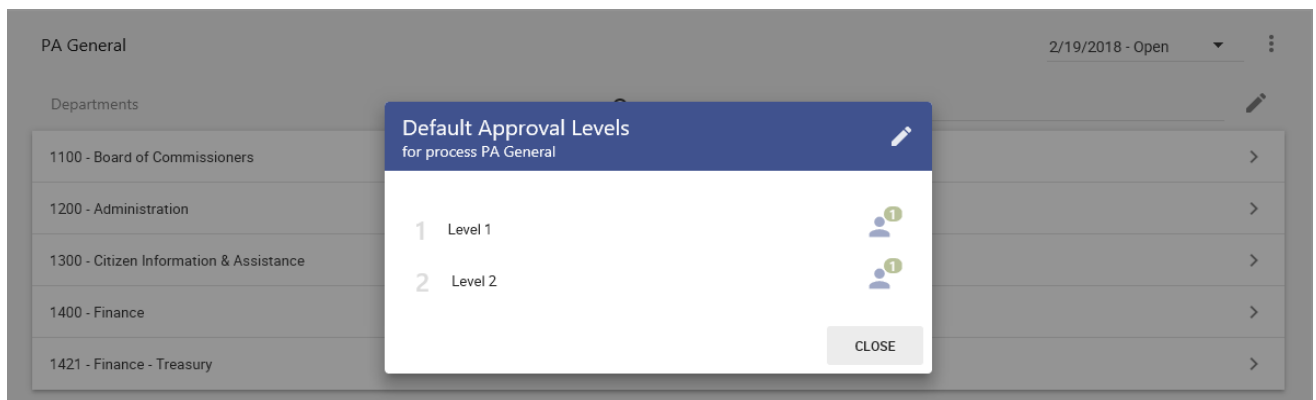
Actions menu

To view or edit default approval levels, manage notifications or edit an approval process, click the **Actions** menu icon  in the top-right corner of the **process card**.



View/Edit Default Levels

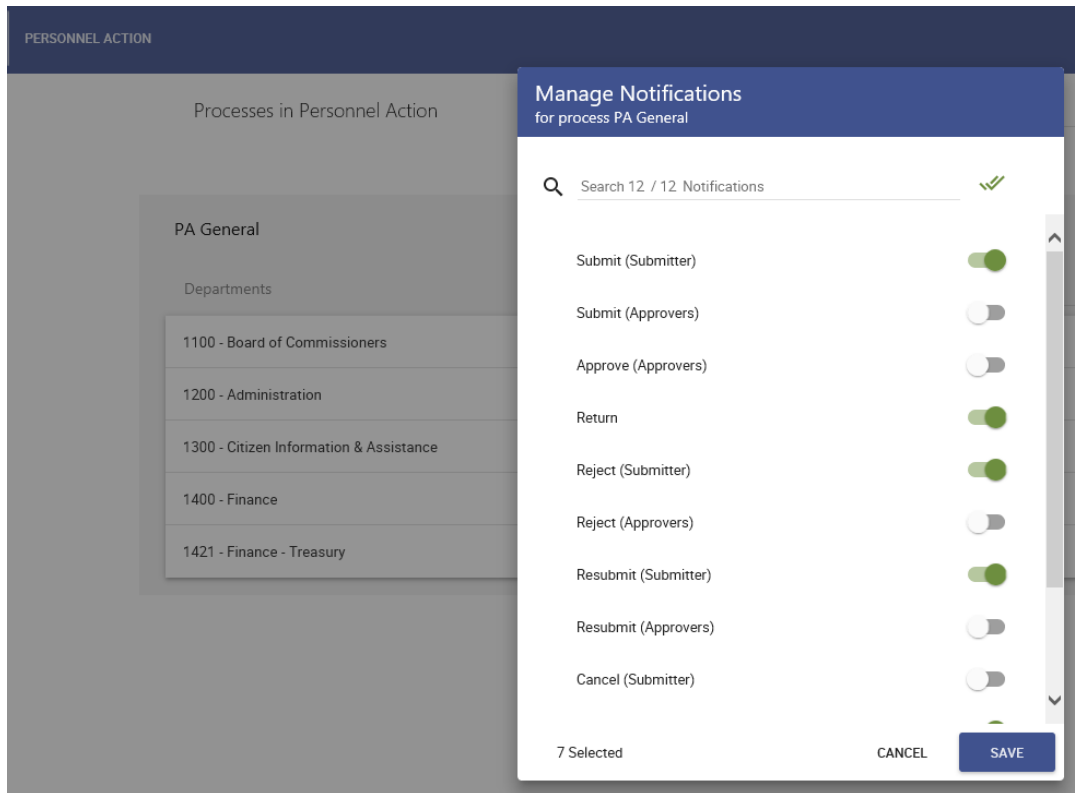
The **View/Edit Default Levels** menu option opens the **Default Approval Levels dialog** in view mode. To edit the levels, click the pencil icon  in the top-right corner of the dialog.



Note: A department with custom approval levels maintains the custom-level structure unless you revert it to the default structure.

Notification Settings

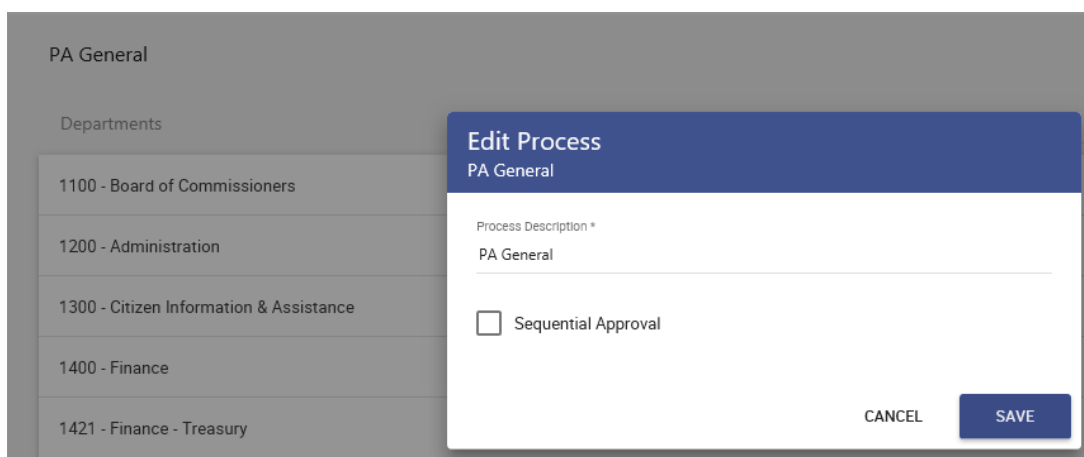
The **Notification Settings** option opens the **Manage Notifications dialog** for the selected process.



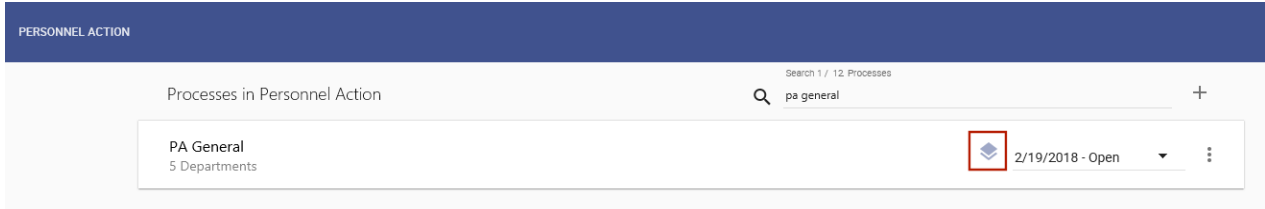
Use this dialog to select the approval events that will generate emails. To view or edit the templates that are set up for each notification, navigate to Maintenance > new world ERP Suite > System > [Email Templates](#).

Edit Process

Clicking the **Edit Process** option opens the **Edit Process dialog**.



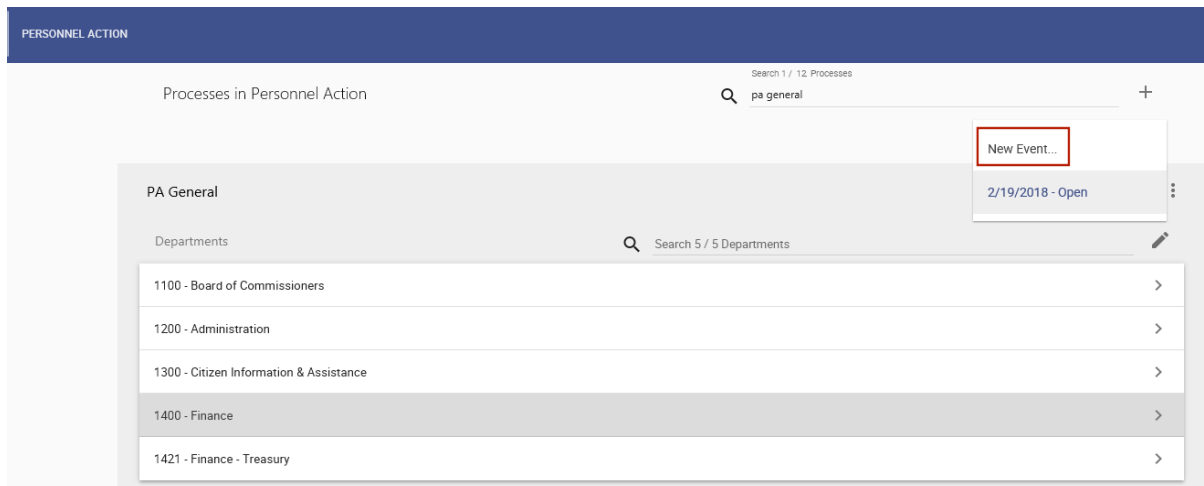
You may edit the *Process Description* and select or deselect *Sequential Approval*. If an approval process is set up to be sequential, an icon  displays on the right side of the **process card**, to the left of the effective date range.



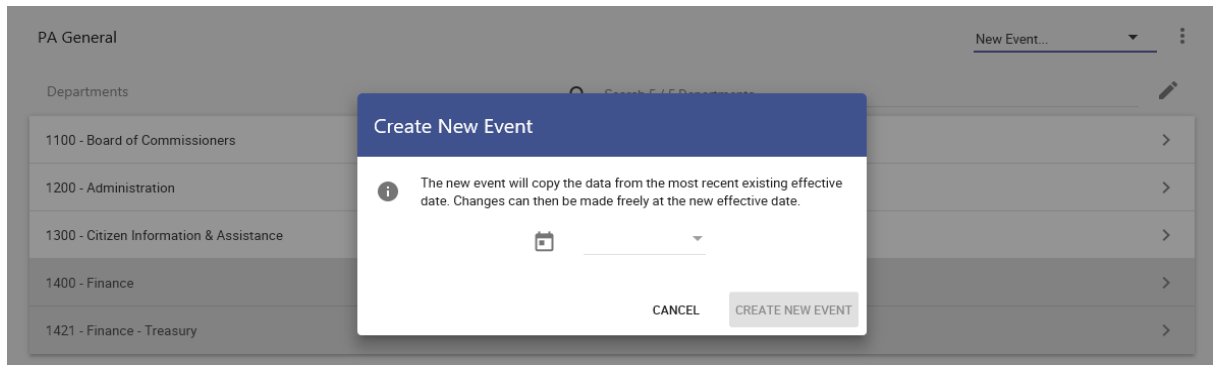
Effective dates

To change the effective date range of a process or approval level, you need to create a new instance of the process or approval level.

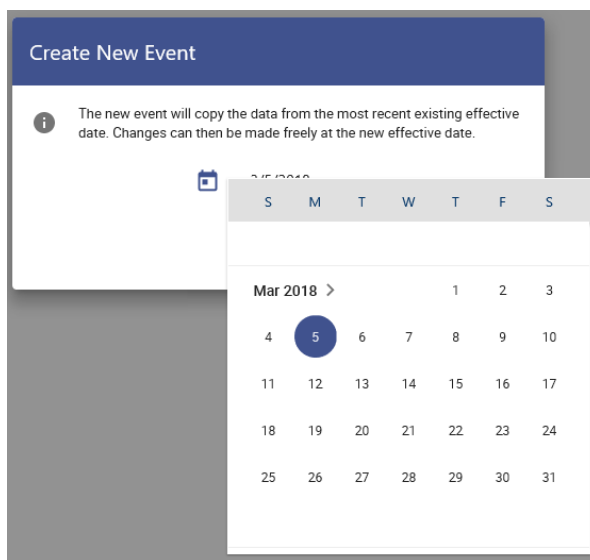
1. Click in the effective date field near the top-right area of the display.
2. Click the **New Event** option.



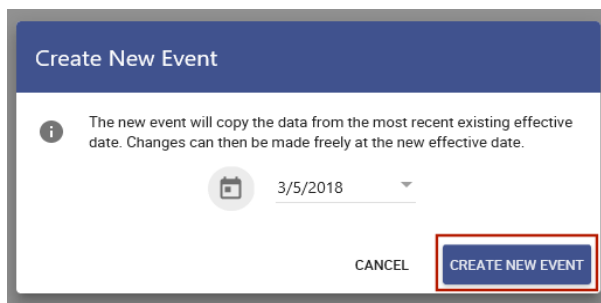
The **Create Event** dialog opens.



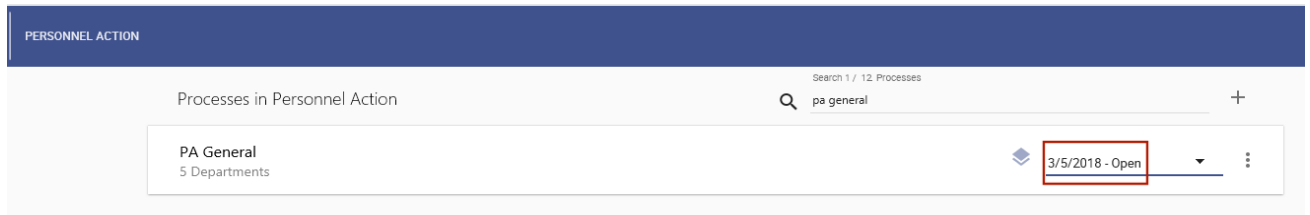
3. Select the **new effective date**.



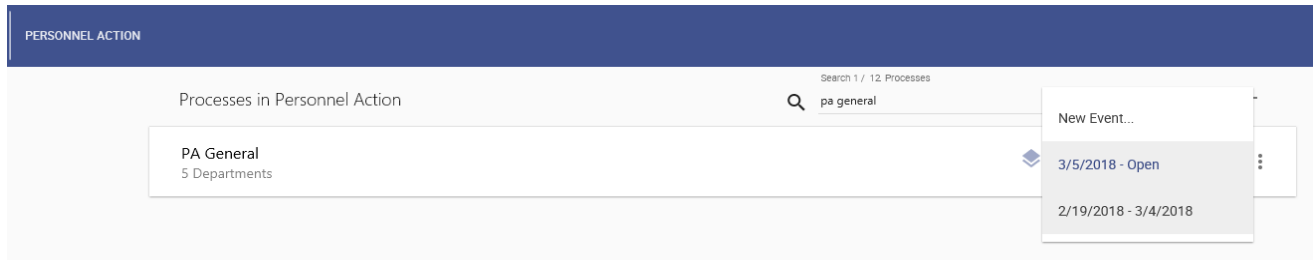
4. Click the **CREATE EVENT** button.



All data from the current process is copied to the new process, and an end date of the day before the new effective date is applied to the current process. You may edit the data for the **new process**, including departments, approval levels and users, as necessary.



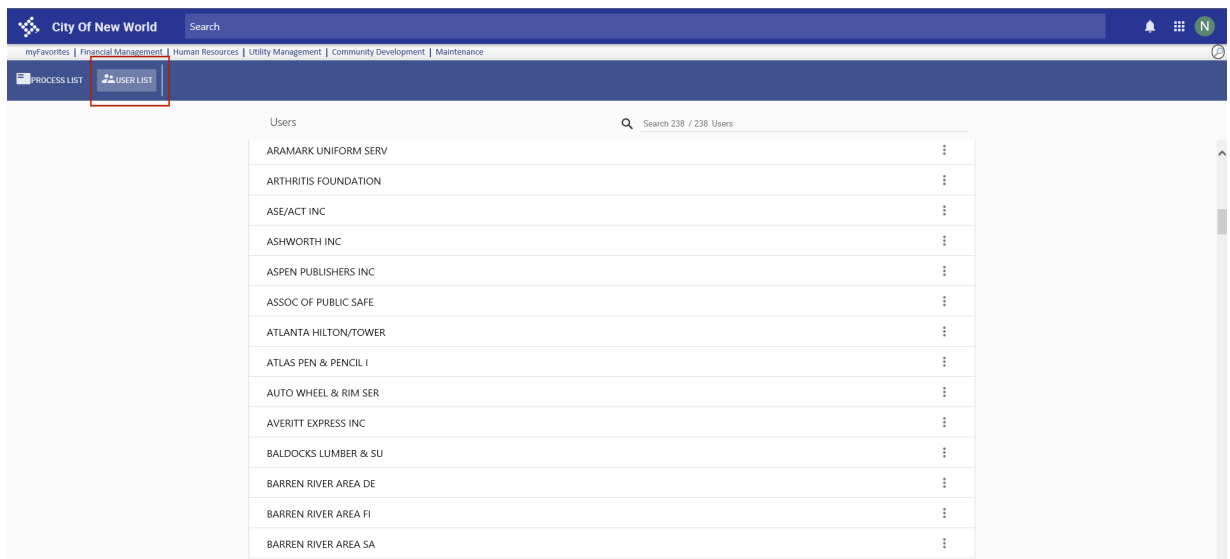
The new process becomes the default selection, but you may select any other from the **drop-down**.



Working from the USER LIST

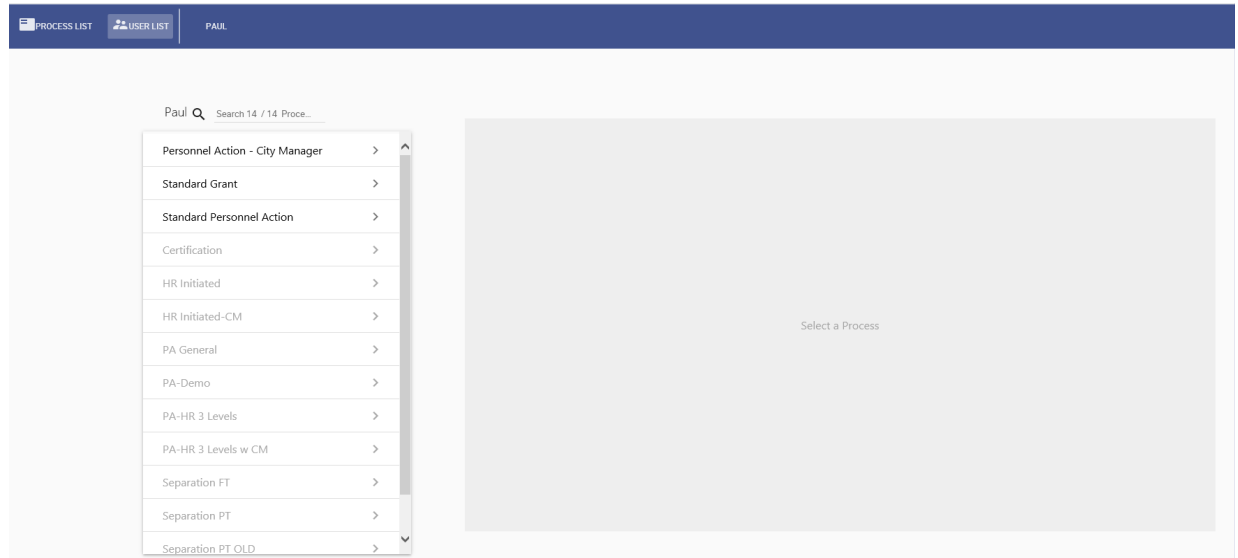
In addition to the PROCESS LIST, you have the option to work from the USER LIST.

1. Click the **USER LIST** tab to the right of the **PROCESS LIST** tab. An **alphabetical list of all users** displays, with each user listed on a card.

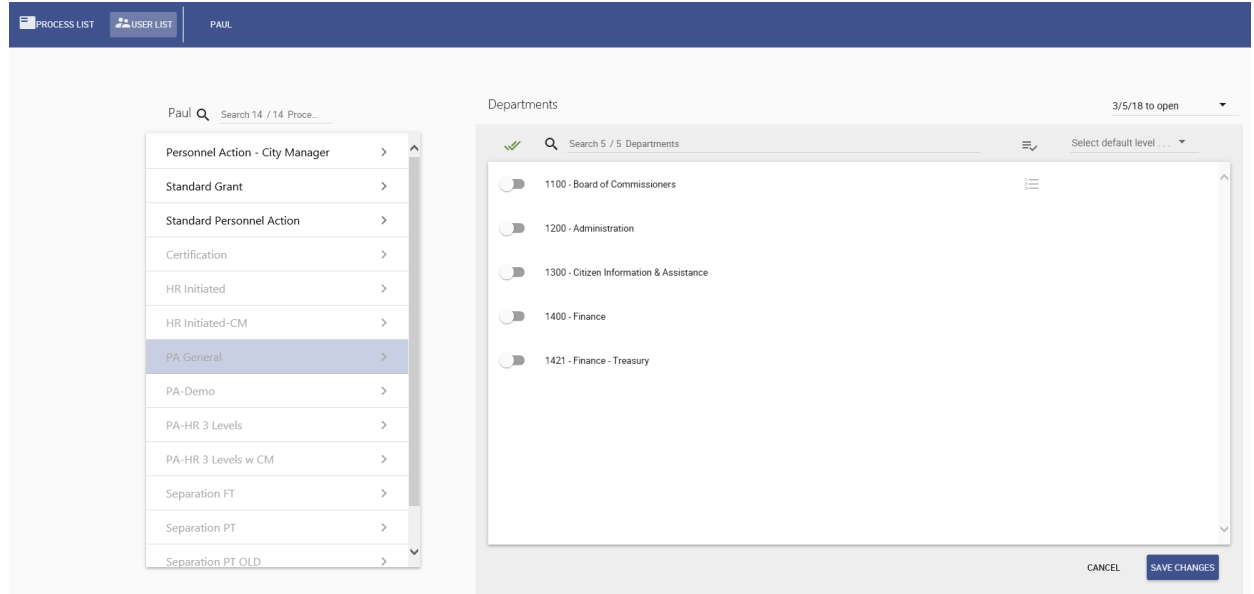


2. Use the *Search* field at the top to find a user.
3. When the user's card appears, click it. The **page refreshes** to show a list of all

processes on the left, with the ones associated with the user displayed alphabetically at the top and the text of the remaining processes, the ones not associated with the user, grayed-out below. You may associate the user with any of the processes.

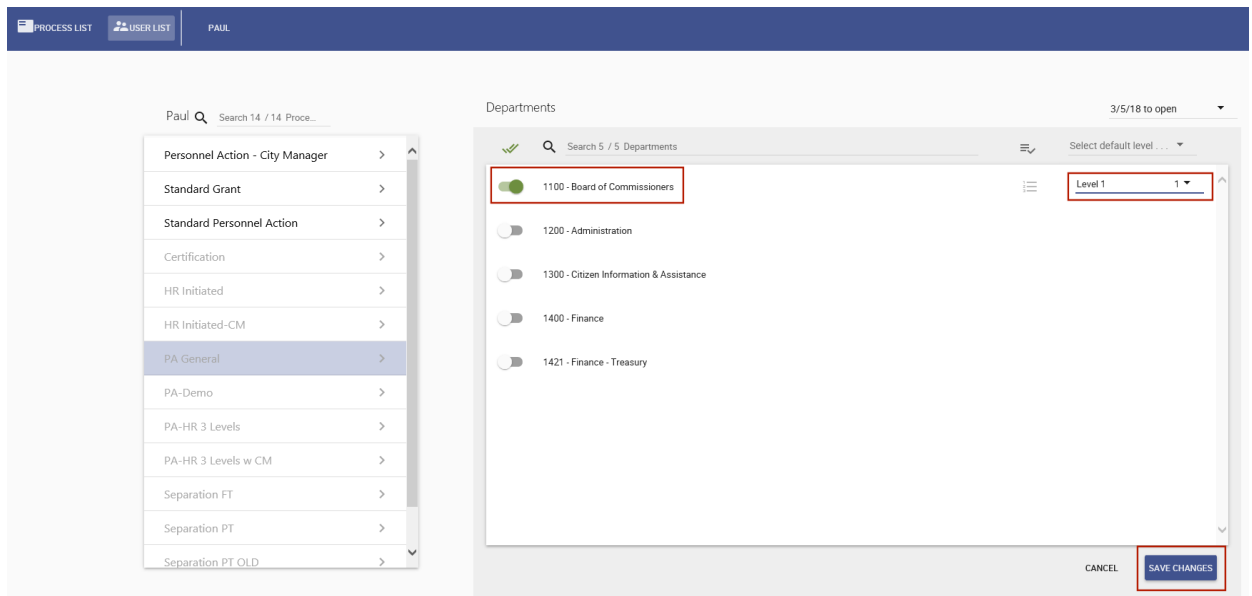


4. Select a process. A **list of the departments** associated with the process loads in a panel on the right.



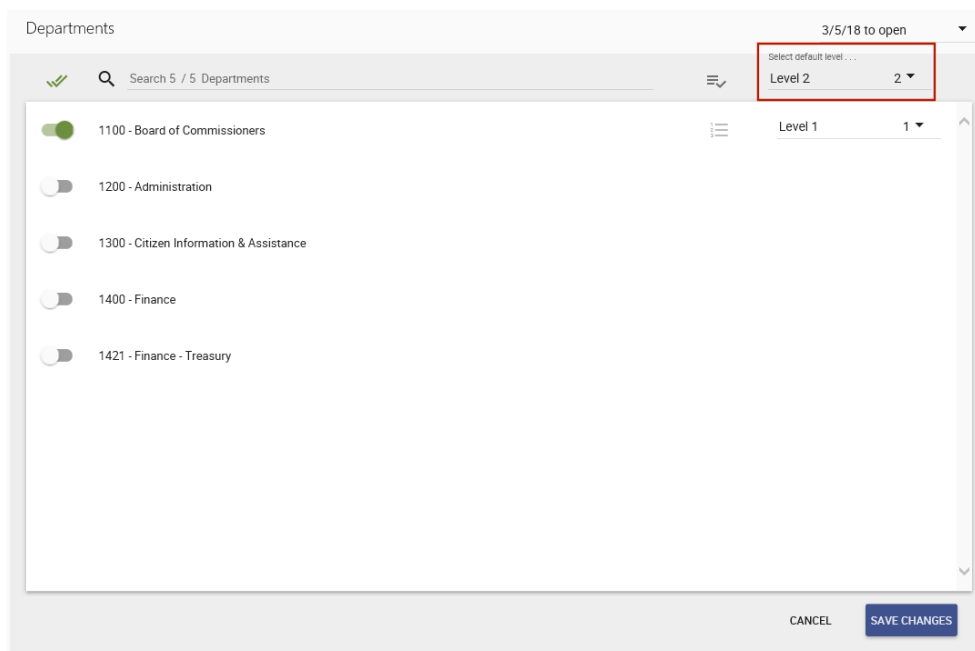
5. Any department already associated with the user is selected. To associate the user with a new department, select it.
6. A **Select a Level field** appears on the right. Select the user's approval level from the

drop-down.



The screenshot shows a user configuration window for 'PAUL'. On the left is a list of processes, with 'PA General' selected. On the right is the 'Departments' panel, which contains a list of departments with toggle switches. The first department, '1100 - Board of Commissioners', is selected. In the top-right corner of the 'Departments' panel, there is a 'Select default level...' dropdown menu currently set to 'Level 1'. At the bottom-right of the panel are 'CANCEL' and 'SAVE CHANGES' buttons.

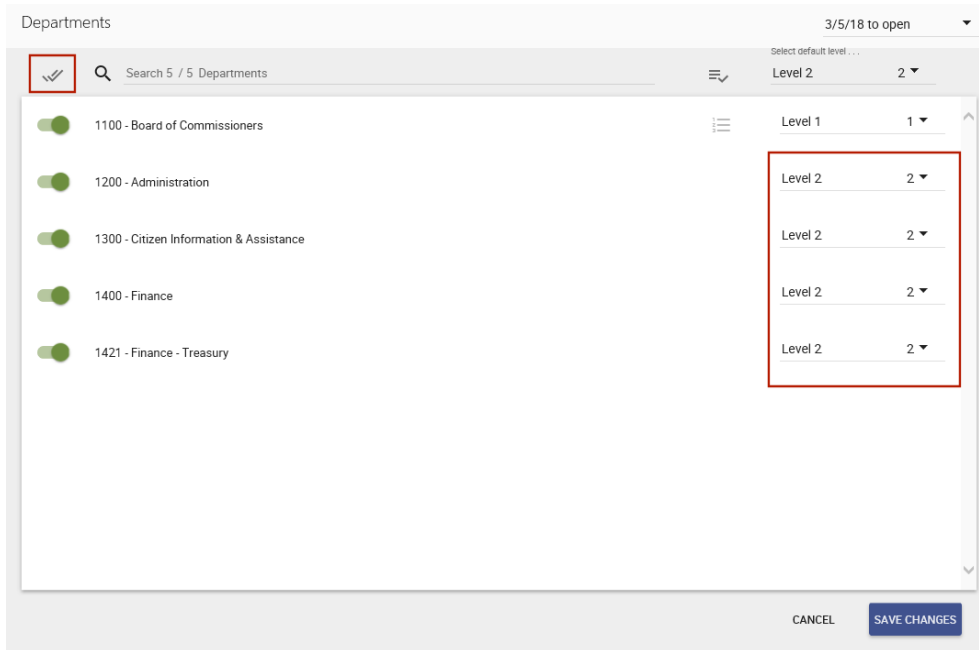
7. Click the **SAVE CHANGES** button on the bottom-right.
8. To select a user's default approval level for any departments that do not have a custom approval setup, select the default level in the **Select default level field** in the top-right border of the Departments panel.



This screenshot is similar to the previous one, but the 'Select default level...' dropdown in the top-right corner of the 'Departments' panel is now set to 'Level 2'. The '1100 - Board of Commissioners' department remains selected, and the 'SAVE CHANGES' button is highlighted at the bottom-right.

9. As you select the departments, the user is automatically added to the default level,

which appears on the **right**. (To select or deselect all departments at once, click the double check mark  to the left of the *Search* field.)



Departments 3/5/18 to open

 Search 5 / 5 Departments

Select default level ...

Level 2 2

Level 1 1

Level 2 2

Level 2 2

Level 2 2

Level 2 2

CANCEL SAVE CHANGES

10. Click **SAVE CHANGES**.

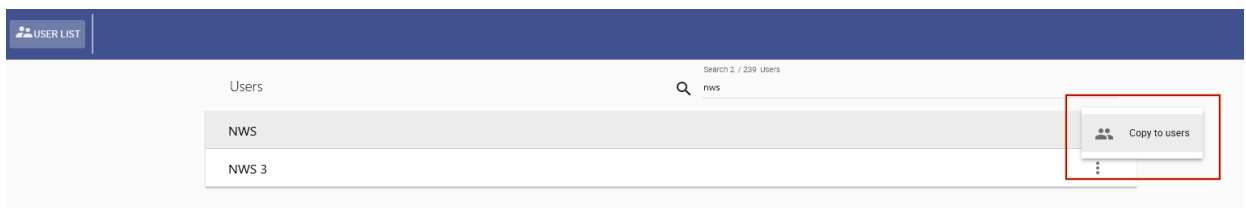
The *Select default level* drop-down also contains **Highest Level** and **Lowest Level** options. These options also apply to departments with custom approvals. Whatever department you select adds the user to the highest or lowest approval level for that department.

To apply the lowest or highest level to all departments at once, select the level, and click the **Apply to all departments** icon  to the left of the *Select default level* field.

Copy User

To copy one user's approval setup to other users, follow these steps:

1. From the **USER LIST**, search for the user whose approval setup you want to copy to other users.
2. Click the Actions menu icon . A **Copy to users option** displays.



USER LIST

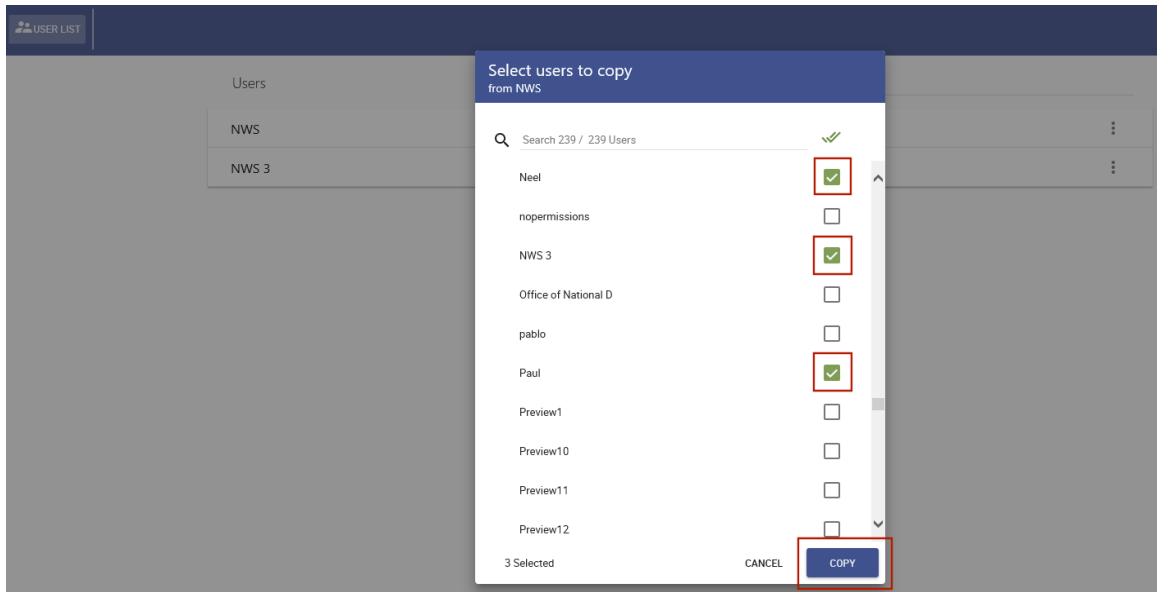
Users Search 2 / 239 Users

NWS

NWS 3

 Copy to users

3. Select the option. A **Select users to copy** dialog opens.



4. Select all the users you want to have the same department and approval associations as the selected user.



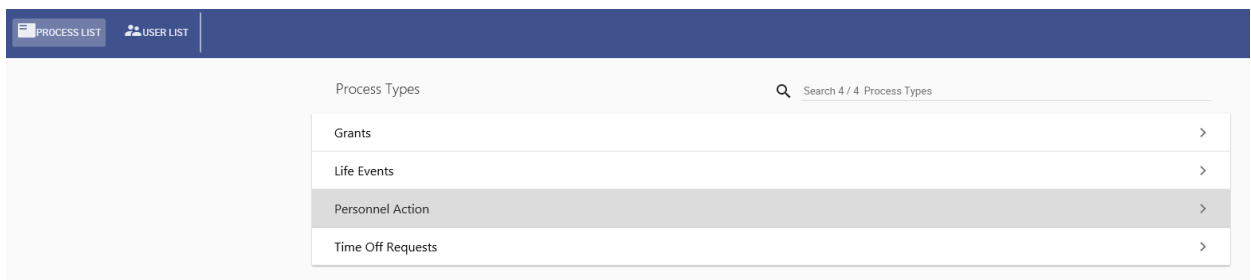
Note: Whatever setup the copy-to users currently have will be overridden by the setup of the copy-from user.

5. Click the **COPY** button.

Shortcut to modifying a user's department setup

Another, quicker way to modify a user's department setup is as follows:

1. From the **PROCESS LIST** tab, click a **process type**.



2. Click a **process**.

PROCESS LIST	USER LIST	PERSONNEL ACTION
Processes in Personnel Action Search 12 / 12 Processes		
Certification	35 Departments	1/1/2017 - Open
HR Initiated	36 Departments	7/12/2015 - Open
HR Initiated-CM	36 Departments	7/12/2015 - Open
PA General	5 Departments	2/19/2018 - 3/4/2018

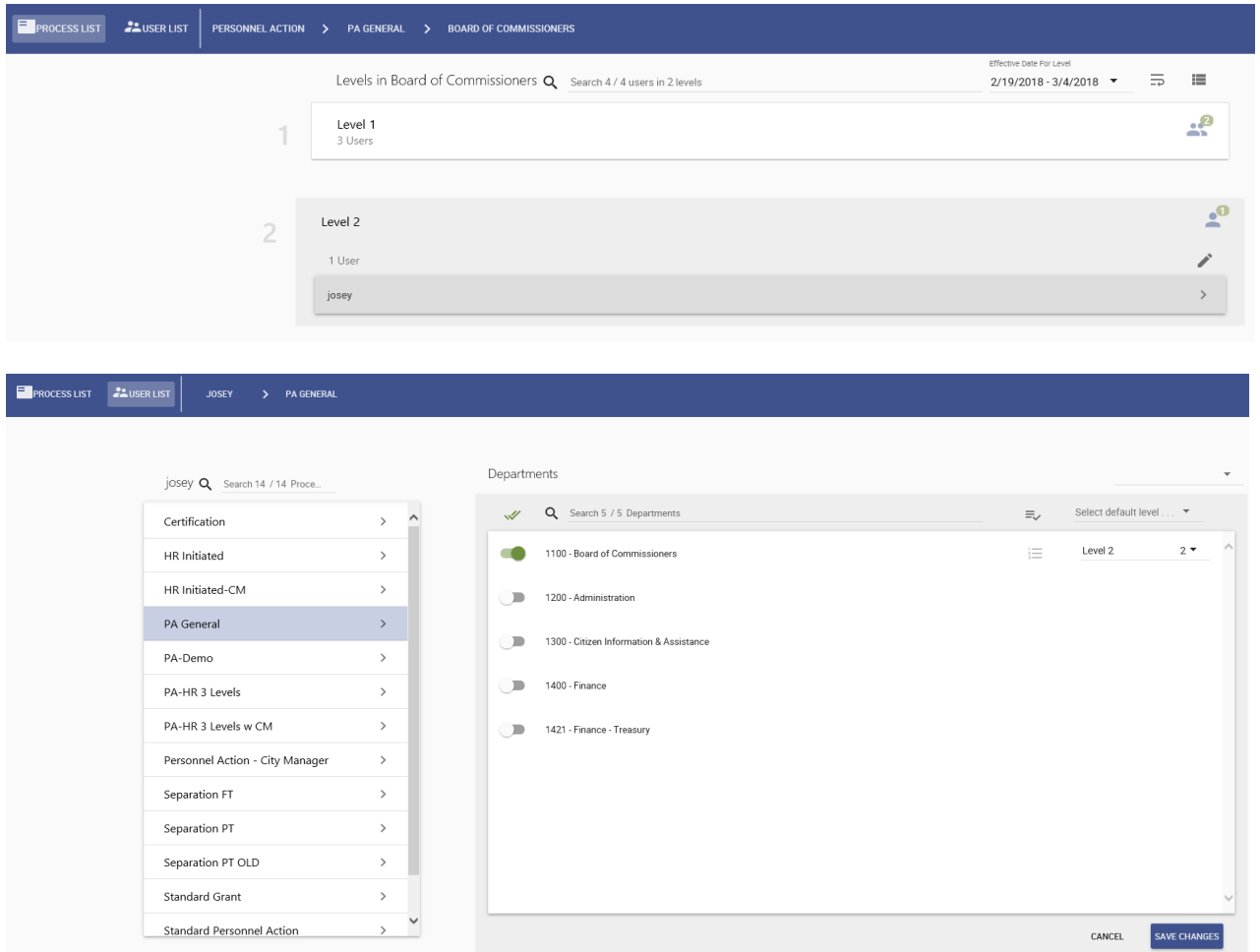
3. Click a **department**.

PROCESS LIST	USER LIST	PERSONNEL ACTION
Processes in Personnel Action Search 12 / 12 Processes		
Certification	35 Departments	1/1/2017 - Open
HR Initiated	36 Departments	7/12/2015 - Open
HR Initiated-CM	36 Departments	7/12/2015 - Open
PA General	5 Departments	2/19/2018 - 3/4/2018
Departments Search 5 / 5 Departments 1100 - Board of Commissioners 1200 - Administration 1300 - Citizen Information & Assistance 1400 - Finance 1421 - Finance - Treasury		

4. Click a **level** that includes the user.

PROCESS LIST	USER LIST	PERSONNEL ACTION	PA GENERAL	BOARD OF COMMISSIONERS
Levels in Board of Commissioners Search 4 / 4 users in 2 levels Effective Date For Level: 2/19/2018 - 3/4/2018				
1	Level 1	3 Users		
2	Level 2	1 User		

5. Click the **user**.



The first screenshot shows the 'Levels in Board of Commissioners' page. It features a search bar with the text 'Search 4 / 4 users in 2 levels' and a date range '2/19/2018 - 3/4/2018'. Below the search bar, there are two levels listed: 'Level 1' with 3 users and 'Level 2' with 1 user. The user 'josey' is listed under Level 2.

The second screenshot shows the 'JOSEY > PA GENERAL' page. It features a search bar with the text 'josey Search 14 / 14 Proce...'. Below the search bar, there is a list of departments with checkboxes: 'Certification', 'HR Initiated', 'HR Initiated-CM', 'PA General' (selected), 'PA-Demo', 'PA-HR 3 Levels', 'PA-HR 3 Levels w CM', 'Personnel Action - City Manager', 'Separation FT', 'Separation PT', 'Separation PT OLD', 'Standard Grant', and 'Standard Personnel Action'. To the right, there is a 'Departments' section with a search bar 'Search 5 / 5 Departments' and a list of departments with checkboxes: '1100 - Board of Commissioners' (checked), '1200 - Administration', '1300 - Citizen Information & Assistance', '1400 - Finance', and '1421 - Finance - Treasury'. At the bottom right, there are 'CANCEL' and 'SAVE CHANGES' buttons.

Bank List

Maintenance > new world ERP Suite > Banks

A new hierarchical grid with column filters has been applied to the [Bank List page](#).

Bank List

Description	Routing Number	Accounts	ACH Bank Name
Contains...	Contains...		Contains...
Merrill Lynch Bank One	044000004		
MetaBank	073972181		
MidWest America	274873141		
Montana Federal Credit Union	292977336		
Monticello Banking Company	083902581		
Morgantown Bank & Trust	083903742		
National City	041000124		
National City Bank	083000056	9	
Branch Name		Contact Name	Contact Phone
National City Bank			

Active	Branch	Account Code	Account Type	Description
☒	National City Bank	CD Agency		CD Agency Leave
☒	National City Bank	Section 8		Section 8 Vouchers
☒	National City Bank	Family		Family Self Sufficiency
☒	National City Bank	Trustee - Miram		Trustee Account / Miram Bereton
☒	National City Bank	CD Block Grant		CD Block Grant
☒	National City Bank	Economic Dev		Economic Development
☒	National City Bank	Rental Rehab		Rental Rehab
☒	National City Bank	Trustee - Home		Trustee Account / Homeownership
☒	National City Bank	Revolving Loan		Revolving Loan
	National City Bank of Midwest-MI	072000915		
	Navy Fed Credit Union	256074974		
	New Farmers National Bank	083901977		
	Old Hickory Credit Union	264181448		
	Old National Bank	086300012		
	Option 1 Credit Union	272480432		
	Owensboro Federal Credit Union	283980002		
	Paducah Federal Credit Union	283980099		

101 - 125 of 198 records

New

Refresh

Delete

Print

10-

4

Prev

3

4

5

6

7

Next

25

Show

records

Use the filter at the top of each column to search for specific information. As you make an entry in a filter, the grid will refresh to show only the rows containing the information that most closely matches the entry. **Watch.**

A gear-shaped icon  is located on the right side of each column heading. Clicking this icon opens a **menu of options** for manipulating the column in various ways.

Bank List

Description

Y Contains

Routing Number

Y Contains

Accounts

Y Contains

ACH Bank Name

Y Contains

Merrill Lynch Bank One

044000804

MetaBank

073972181

MidWest America

274873141

Montana Federal Credit Union

292977336

Monticello Banking Company

083902581

Morgantown Bank & Trust

083903742

National City

041000124

National City Bank

083000056

9

Branch Name

Contact Name

Contact Phone

National City Bank

Active

Branch

Account Code

Account Type

Description

✓

National City Bank

CD Agency

CD Agency Leave

✓

National City Bank

Section 8

Section 8 Vouchers

✓

National City Bank

Family

Family Self Sufficiency

✓

National City Bank

Trustee - Miram

Trustee Account / Miram Bereton

✓

National City Bank

CD Block Grant

CD Block Grant

✓

National City Bank

Economic Dev

Economic Development

✓

National City Bank

Rental Rehab

Rental Rehab

✓

National City Bank

Trustee - Home

Trustee Account / Homeownership

✓

National City Bank

Revolving Loan

Revolving Loan

National City Bank of Midwest-MI

072000915

Navy Fed Credit Union

256074974

New Farmers National Bank

083901977

Old Hickory Credit Union

264181448

Old National Bank

086300012

Option 1 Credit Union

272480432

Owensboro Federal Credit Union

283980002

Paducah Federal Credit Union

283980099

101 - 125 of 198 records

10- Prev 3 4 5 6 7 Next 25 records

New Refresh Delete Print

Hide Filter

Hide

Column Chooser

Sort on Multiple

Advanced Filter

Move To

Toggle Group By

Export

Grid State

Note that the **Export button** that was on the bottom of the Bank List page in previous releases has been moved to this menu.



Export

General

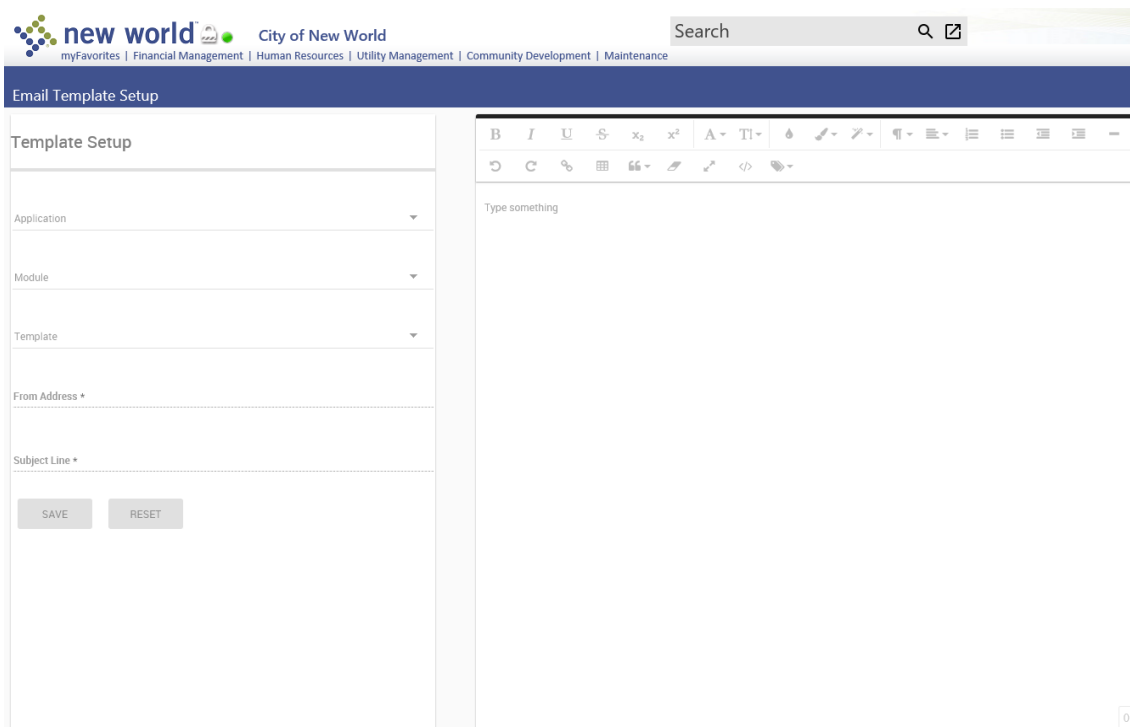
eSuite Email Upgrade

Maintenance > new world ERP Suite > System > Email Templates

eAdministration > [Module] > Payment Email Confirmation

eAdministration > [Module] > Content Configuration

The eSuite email process has been upgraded so that all emails, instead of being sent directly from eSuite, are sent through the Notification Service. As part of this upgrade, email content will be set up in a centralized location, the **Email Template Setup page** in New World ERP.



Email content **setup pages from the eAdministration site** have been moved to the Email Template Setup page.



Home | eHR | ePermits | eRFA | eSupplier | eMiscBilling | eUtilities | eLicensing | eBids | System-wide Settings

Email Management System Module

- License Payment Confirmation Email
- Permit Status Notification Email
- Permit Payment Confirmation Email
- Utilities Payment Confirmation Email
- Misc Bill Payment Confirmation Email

Select a Module

Fill in the following fields to set up your email template

From: eMB@trovmlogosint.com
 Subject: eMB Payment Confirmation
 Email Body Header:
 Email Body Footer:

Save



Home | eHR | ePermits | eRFA | eSupplier | eMiscBilling | eUtilities | eLicensing | eBids | System-wide Settings

eSuite Module

First select the module for which you want to manage
 Select a Module: eRecruit

Content Management

Select a Content Region:

- eRecruit Application Submitted Email Footer
- eRecruit Application Submitted Email Header
- eRecruit Ceremony Page
- eRecruit Home Page

B I

Type something

Save

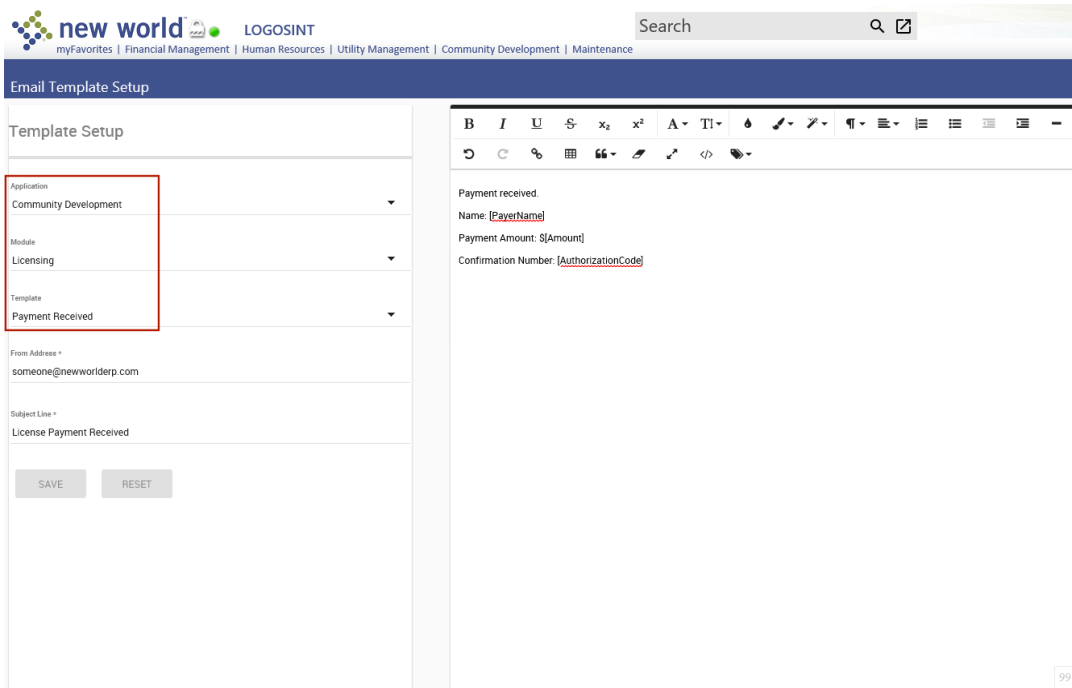
Existing email content from eSuite also will be migrated to the Email Template Setup page. Previously in eSuite, the bodies of email messages were hard coded and could not be changed.

Once all content has been added to the email templates, it may be customized easily.

eSuite Emails Available from the Email Template Setup Page

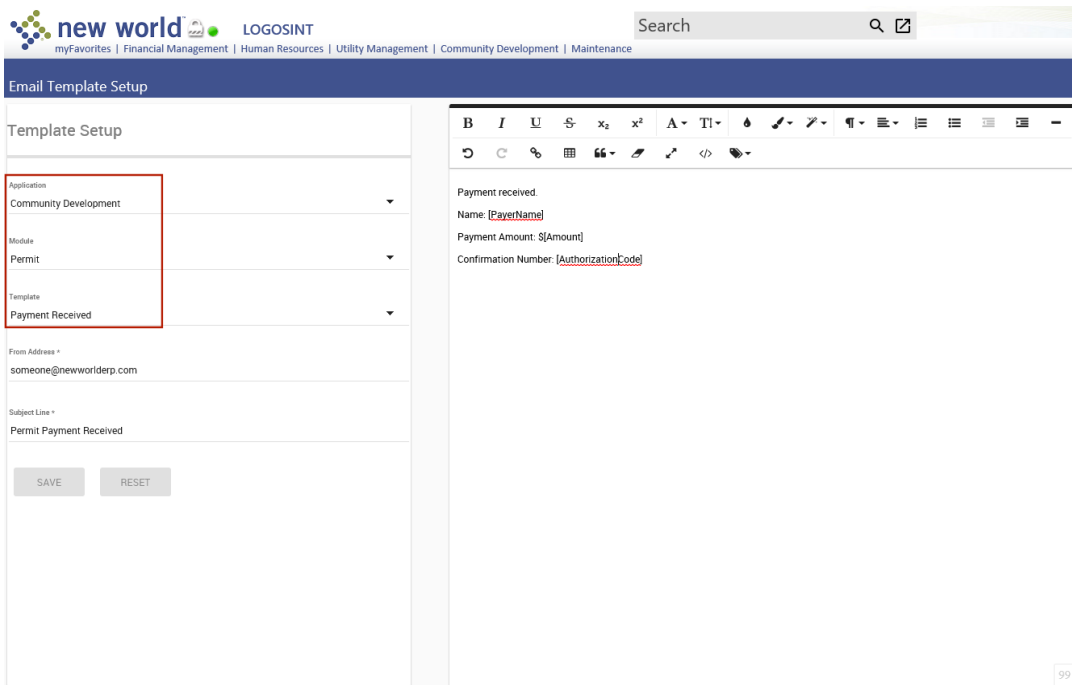
Community Development

Licensing Payment Received



The screenshot shows the 'Email Template Setup' interface. On the left, a sidebar contains a tree view with 'Application' (Community Development), 'Module' (Licensing), and 'Template' (Payment Received) selected. The main area displays the template configuration: 'From Address' is 'someone@newworlderp.com', 'Subject Line' is 'License Payment Received', and there are 'SAVE' and 'RESET' buttons. On the right, a rich text editor shows the email body: 'Payment received. Name: [PayerName] Payment Amount: \${Amount} Confirmation Number: [AuthorizationCode]'. The editor includes a toolbar with various formatting options.

Permit Payment Received



The screenshot shows the 'Email Template Setup' interface for a permit payment. The sidebar on the left has 'Application' (Community Development), 'Module' (Permit), and 'Template' (Payment Received) selected. The main configuration area shows 'From Address' as 'someone@newworlderp.com' and 'Subject Line' as 'Permit Payment Received', with 'SAVE' and 'RESET' buttons. The right-hand rich text editor displays the email body: 'Payment received. Name: [PayerName] Payment Amount: \${Amount} Confirmation Number: [AuthorizationCode]'. The editor features a standard toolbar for text formatting.

Permit Application Approved

 **new world**  LOGOSINT

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search  

Email Template Setup

Template Setup

Application
Community Development

Module
Permit

Template
Permit Application Approved

From Address *
someone@newworlderp.com

Subject Line *
The status of [PermitTypeCodeAndNumber] has changed.

SAVE RESET

B I U S x₂ x² A T⁺         

The Application for permit [PermitTypeCodeAndNumber] has been approved.

Permit Type and Number: [PermitTypeCodeAndNumber]

Address: [AddressLine1]

[City], [State] [ZipCode]

Parcel: [ParcelNumber]

Subdivision: [Subdivision]

Lot: [LotNumber]

Description: [PermitTypeDescription]

Amount Due: \$[AmountDue]

293

Permit Application Denied

 **new world**  City of New World

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search  

Email Template Setup

Template Setup

Application
Community Development

Module
Permit

Template
Permit Expired

From Address *
someone@newworlderp.com

Subject Line *
The status of [PermitTypeCodeAndNumber] has changed.

SAVE RESET

B I U S x₂ x² A T⁺         

Your permit status has changed.

Permit [PermitTypeCodeAndNumber] has expired. No work may be done at [AddressLine1] until a new Permit is issued.

Permit Type and Number: [PermitTypeCodeAndNumber]

Address: [AddressLine1]

[City], [State] [ZipCode]

Parcel: [ParcelNumber]

Subdivision: [Subdivision]

Lot: [LotNumber]

Description: [PermitTypeDescription]

Amount Due: \$[AmountDue]

366

Permit Issued

 **new world**  City of New World

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search  

Email Template Setup

Template Setup

Application
Community Development

Module
Permit

Template
Permit Issued

From Address *

someone@newworlderp.com

Subject Line *

The status of [PermitTypeCodeAndNumber] has changed.

SAVE RESET

B I U S x₂ x² A T⁺                

Your permit status has changed.

Permit [PermitTypeCodeAndNumber] has been issued.

Permit Type and Number: [PermitTypeCodeAndNumber]

Address: [AddressLine1]

[City], [State] [ZipCode]

Parcel: [ParcelNumber]

Subdivision: [Subdivision]

Lot: [LotNumber]

Description: [PermitTypeDescription]

Amount Due: \$[AmountDue]

302

Permit Expired

 **new world**  City of New World

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search  

Email Template Setup

Template Setup

Application
Community Development

Module
Permit

Template
Permit Expired

From Address *

someone@newworlderp.com

Subject Line *

The status of [PermitTypeCodeAndNumber] has changed.

SAVE RESET

B I U S x₂ x² A T⁺                

Your permit status has changed.

Permit [PermitTypeCodeAndNumber] has expired. No work may be done at [AddressLine1] until a new Permit is issued.

Permit Type and Number: [PermitTypeCodeAndNumber]

Address: [AddressLine1]

[City], [State] [ZipCode]

Parcel: [ParcelNumber]

Subdivision: [Subdivision]

Lot: [LotNumber]

Description: [PermitTypeDescription]

Amount Due: \$[AmountDue]

366

Temporary Certification of Occupancy Issued

Final Certification of Occupancy Issued

Stop Work Issued

 **new world**  City of New World
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search  

Email Template Setup

Template Setup

Application
Community Development

Module
Permit

Template
Stop Work Issued

From Address *

someone@newworlderp.com

Subject Line *

The status of [PermitTypeCodeAndNumber] has changed.

SAVE RESET

B *I* U                                     

 **new world**  **LOGOSINT** Search 

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Email Template Setup

Template Setup

Application
Financial Management

Module
eSuite Miscellaneous Billing

Template
Password Reset Confirmation

From Address *
someone@newworlderp.com

Subject Line *
eMiscBilling Password Reset Confirmation

Additional Emails +

SAVE RESET

B I U                     

Your eMiscBilling password has been successfully reset.
If you did not change your password, please contact your system administrator.
Best regards,
New World Financial Management

176

Miscellaneous Billing Payment Received

 **new world**  **LOGOSINT** Search 

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Email Template Setup

Template Setup

Application
Financial Management

Module
eSuite Miscellaneous Billing

Template
Payment Received

From Address *
someone@newworlderp.com

Subject Line *
Payment Received

Additional Emails +

SAVE RESET

B I U                     

Payment Received for Customer: [CustomerNumber] - [CustomerName]
Payment Date: [PaymentDate]
Confirmation Number: [ConfirmationNumber]
Total Charge: \$[TotalCharge]

160

Human Resources

eRecruit Application Submitted

 **new world**  LOGOSINT

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search 

Email Template Setup

Template Setup

Application
Human Resources

Module
eRecruit

Template
Application Submitted

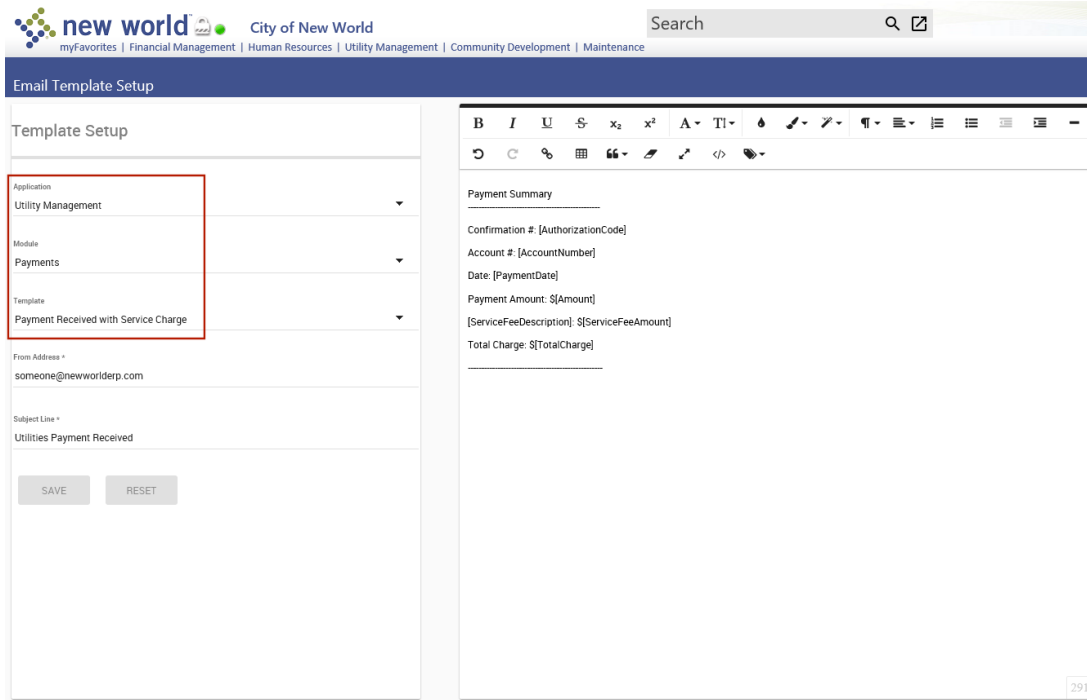
From Address *
someone@newworlderp.com

Subject Line *
Online Application Submitted Successfully

Additional Emails +

SAVE RESET

B *I* U ~~S~~ x_2 x^2 **A** **T**                                



For more on the Email Template Setup page, click [here](#).

Global Search

To increase convenience and speed in finding the information you need from anywhere in New World ERP, a global *Search* field has been added to all pages of the software:



When you click in the field to activate the search, the background turns white:



Type the search term and press **<Enter>**. The Global Search page opens, displaying the results in the right panel on individual cards. Different icons appear for different types of search results. The left panel contains a list of the modules searched, with the number of potentially matching records shown in parentheses next to each module, sorted in descending order from the highest number of potential matches to the lowest. **Watch.**

If you need to filter the results, select the check box next to the appropriate module in the left panel. The right panel reloads with the results for that module only, while **sub-filters** for the module selected appear in bold in the left panel to let you filter the results further.

Modules

- ☐ Payments (213)
- ☐ AP Invoices (114)
- ☐ MB Invoices (37)
- ☐ Journals (16)
- ☒ Purchase Orders (12)
- ☐ MB Customers (9)
- ☐ Vendors (7)
- ☐ Employees (1)
- ☐ Revenue Collection Receipts (0)
- ☐ UM Customers (0)
- ☐ Notes (0)

Status

- ☐ Completed (11)
- ☒ Voided (1)

Type

- ☐ PO (12)

Watch.

Result Card Breakdown

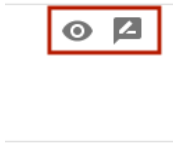
The **left side** of a result card displays a unique icon indicating the associated module. It also displays basic identifying information relevant to the result type. (See **Icon Keys** below.)

	CLARK FAMILY CHIROPRACTIC INC • 17220	
Address	351 PASCOE BLVD STE 105 & 106 Troy, MI 48084	Contact Name CLARK FAMILY CHIROPRACTIC INC



Note: An inactive icon  displays to the right of the name of an inactive employee or vendor.

The **right side** of the card displays one or more icons that let you view, edit or perform other actions on the source record. (See **Icon Keys** below.)



Click a card to **expand** it and view additional information related to the source record. Click the top of the card to collapse it.

 CLARK FAMILY CHIROPRACTIC INC • 17220
  

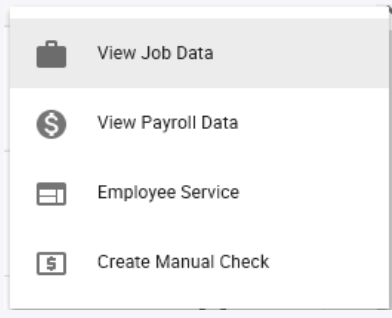
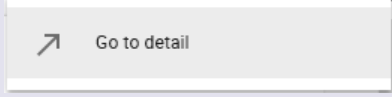
Address 351 PASCOE BLVD STE 105 & 106 Troy, MI 48084	Contact Name CLARK FAMILY CHIROPRACTIC INC	Email Address cfam@newworlderp.com
	Phone Number 111-222-3333 Fax Number 444-555-6666	Last Activity Date 10/1/2017 Current Balance \$727.00

Icon Keys

Module Icons

Icon	Module
	AP Invoices
	Employees
	Journals
	MB Customers
	MB Invoices
	Notes
	Payments
	POs
	Revenue Collection Receipts
	UM Customers
	Vendors

Action Icons

Icon	Action
	Copy PO
	Edit
	More Actions Icon (Employees) 
	More Actions Icon (Notes and UM Customers) 
	Recreate Journal
	Reverse Journal
	View
	View Personal Data

Modules and Associated Sub-Filters

Module	Sub-Filter
AP Invoices	Bank Account
	Department
	Status
Employees	Benefit Group
	Department
	Employment Status
	Employment Type

Module	Sub-Filter
Journals	Department
	Reclassification Type
	Sub Ledger
	Type
	Reference
MB Customers	MB Customer Status
	MB Customer Type
MB Invoices	Customer Type
	Department
	Invoice Type
	Status
Notes	Notes Source
Payments	Bank Account
	Payee Types
	Payment Status
	Payment Type
Purchase Orders	Status
	Type
Revenue Collection Receipts	Cashier
	Collection Station
	Department
	Status
UM Customers	NA
Vendors	Vendor Category
	Vendor Status
	Vendor Type

Fields Searched in Each Module

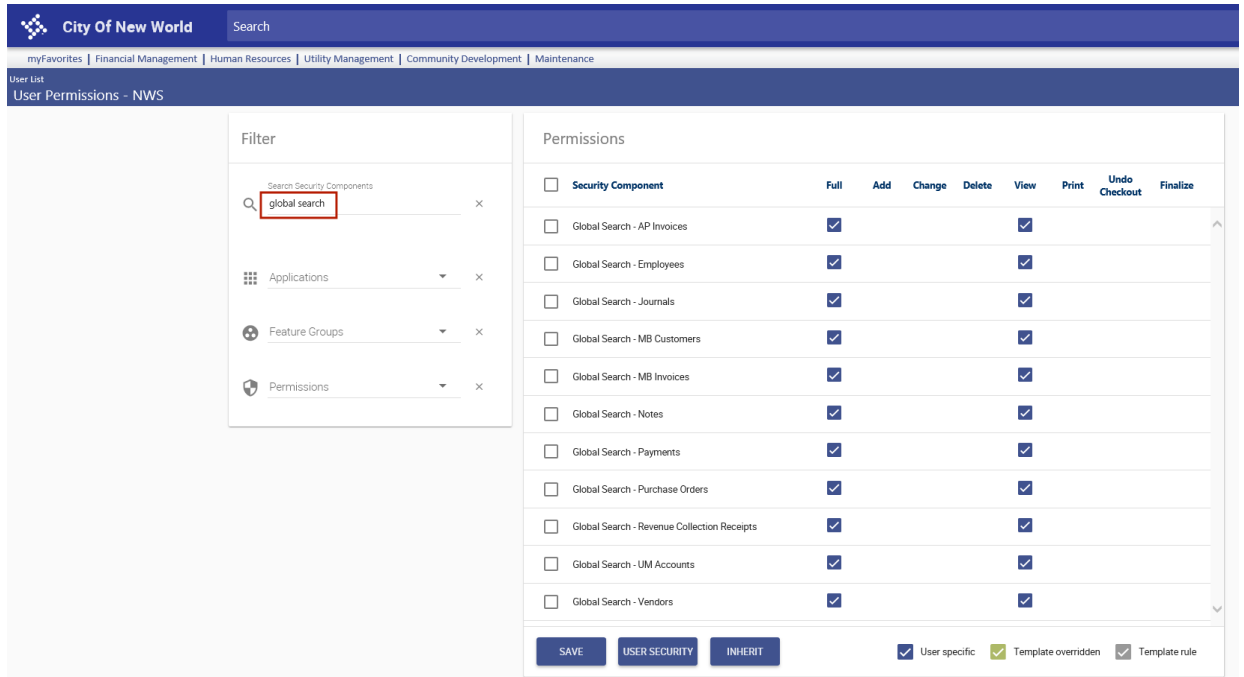
Module	Field
AP Invoices	Invoice Number
	Description
Employees	Employee Number
	Current Job Information: » Department Code » Department Description » Job Title » Benefit Group Code » Benefit Group Description
	Current Name
Journals	Journal Number
	Journal Header Description
	Journal Header Source
MB Customers	Customer Name
	Primary Contact Name
	Customer Number
MB Invoices	Invoice Number
	Description
Notes (Only notes for the logged-in user are returned in the search)	Subject
	Note Body
Payments	Number
	Payee Name
	Amount
Purchase Orders	Purchase Order Number
	Description

Module	Field
Revenue Collection Receipts	Receipt Number
	Received From Name
	Amount
UM Customers	Account Number
	Address
	Customer Name
	Account Status Description
Vendors	Vendor Name
	1099 Name
	Vendor Number

Global Search Security Components

To view the search results for a particular module, users need to be given separate permission through the New World ERP Security menu. To give permission, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > Users.
2. From the User List, select the user's row.
3. Click the **Permissions** button. The User Permissions page opens, containing a Permissions panel of security components and a Filter panel..
4. In the Filter panel, type **global search** in the *Search Security Components* field. The Permissions panel reloads to contain the **Global Search security components**.



Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
☐ Global Search - AP Invoices	☒				☒			
☐ Global Search - Employees	☒				☒			
☐ Global Search - Journals	☒				☒			
☐ Global Search - MB Customers	☒				☒			
☐ Global Search - MB Invoices	☒				☒			
☐ Global Search - Notes	☒				☒			
☐ Global Search - Payments	☒				☒			
☐ Global Search - Purchase Orders	☒				☒			
☐ Global Search - Revenue Collection Receipts	☒				☒			
☐ Global Search - UM Accounts	☒				☒			
☐ Global Search - Vendors	☒				☒			

5. Select the *Full* check box next to any security component for the type of information the user may view. Deselect the check box next to the types of information the user may not view. The Global Search security components are as follows:

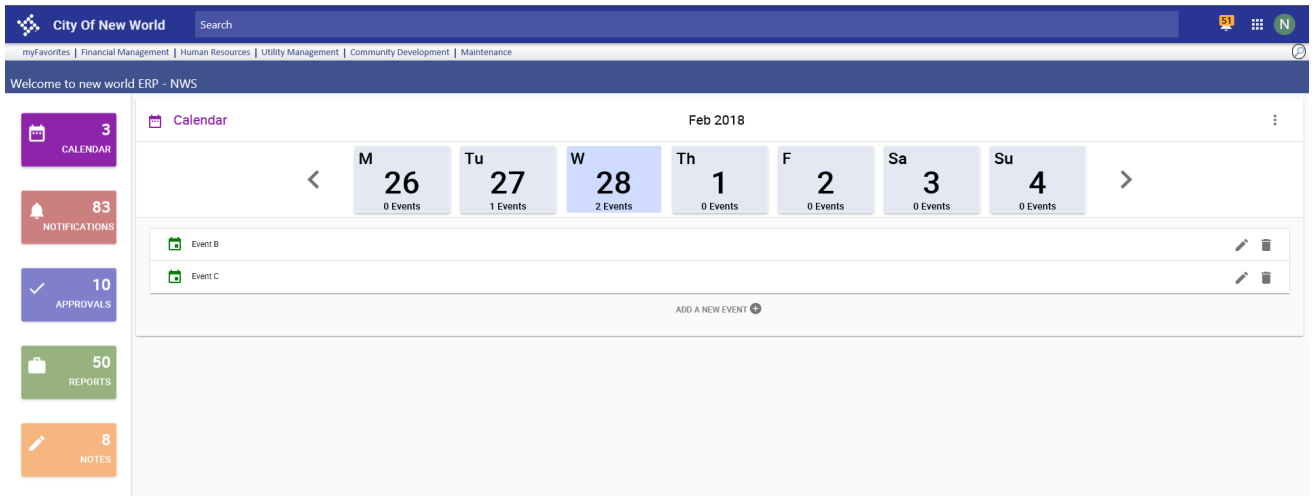
- » **Global Search - AP Invoices**
- » **Global Search - Employees**
- » **Global Search - Journals**
- » **Global Search - MB Customers**
- » **Global Search - MB Invoices**
- » **Global Search - Notes**
- » **Global Search - Payments**
- » **Global Search - Purchase Orders**
- » **Global Search - Revenue Collection Receipts**
- » **Global Search - UM Accounts**
- » **Vendors**

6. Click **Save**.
7. For the permissions to take effect, the user needs to log off and log back onto the system.

New Home Page

Watch video.

The New World ERP home page has been updated with a more modern, intuitive layout that makes it easy to find, review and act on the information most important to you:



All data on the home page is unique for each signed-in user.

In the following home page images, click any area to learn what it does:

Page Header



Information Tiles

Categories of information that appeared on the original home page now appear as hyperlinked tiles arranged in a column down the left side of the new home page. For more on each category, click its corresponding tile in the image below:



Global Search

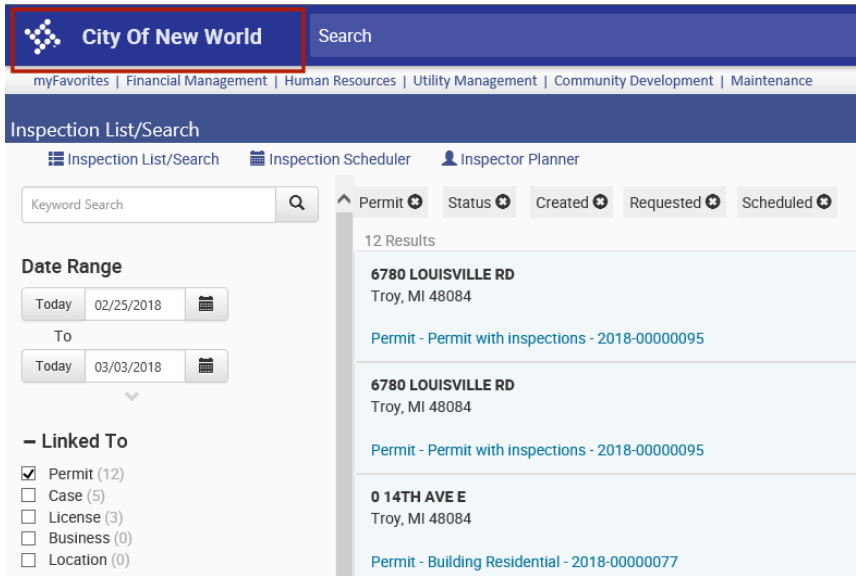
To increase convenience and speed in finding the information you need, a global *Search* field is available at the top of the home page and all other pages of the software:



For more on this feature, click [here](#) for the write-up or [here](#) for the video.

Returning Home

To return to the home page from anywhere in the software, click the company logo in the top-left corner of the page:

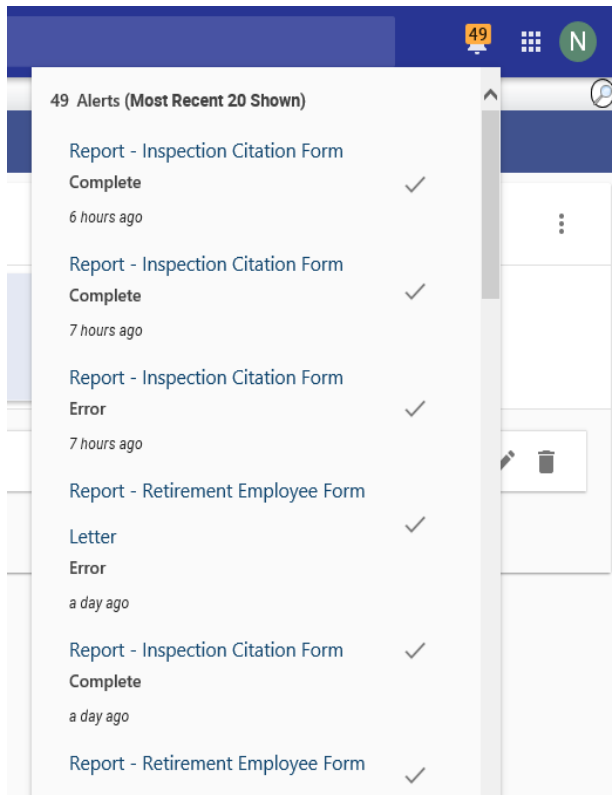


Icons

The following three icons appear in the top-right corner of the home page and all other pages in the software:

Alerts

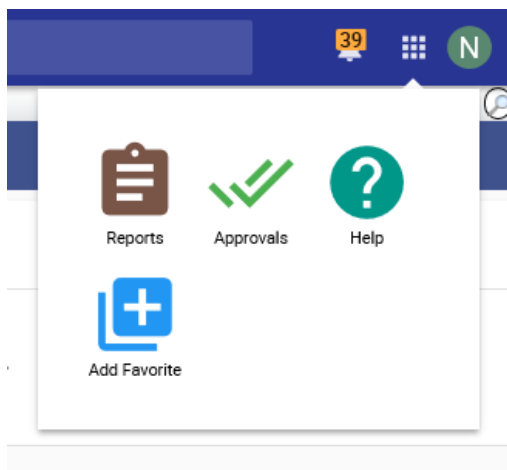
The **Alerts** icon alerts you to the latest items requiring your approval and reports that have completed and are available in myReports. A running count of the items overlays the icon . Clicking the icon opens a **pop-up** containing the most recent 20 items, sorted from the latest to the earliest.



You may click an item to navigate to it or click the check mark  to acknowledge you have seen the item and remove it from the list, reducing the count. Removing it from the list does not remove the approval or report itself.

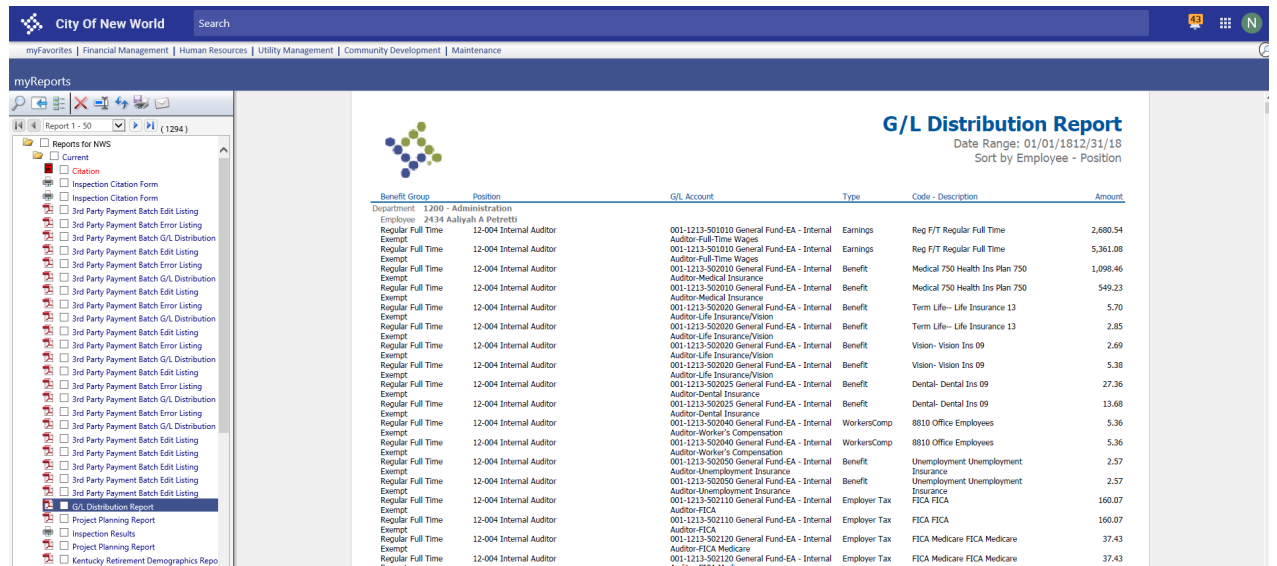
Nine-Box Menu

Clicking this icon opens a **menu** with options to navigate to myReports, Approvals and Help Central and an option to add the current page as a favorite.



myReports

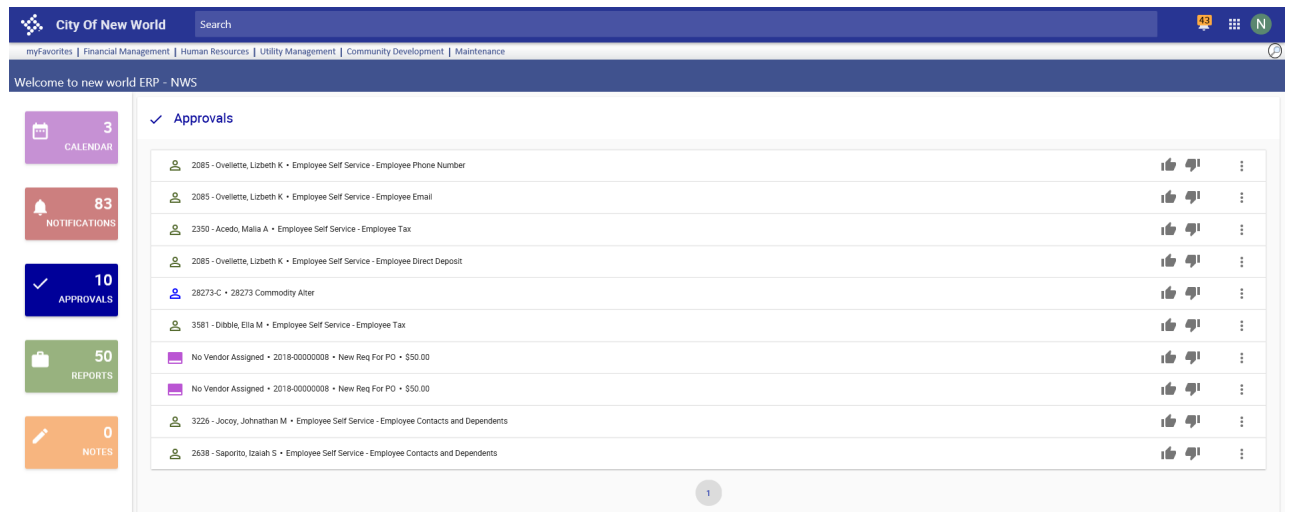
The **myReports** page is where you view and manage the reports you have run.



The screenshot shows the 'myReports' interface for 'City Of New World'. The left sidebar lists various reports, with 'G/L Distribution Report' selected. The main area displays a table titled 'G/L Distribution Report' with the date range '01/01/1812/31/18' and 'Sort by Employee - Position'. The table has columns: Benefit Group, Position, G/L Account, Type, Code - Description, and Amount. It lists various accounts and amounts for different employee positions.

Approvals

The **Approvals** page displays a list of tasks assigned to you. Arranged on individual cards, tasks may include approving purchase orders and employee change requests or reviewing data that has changed as a result of a system process.

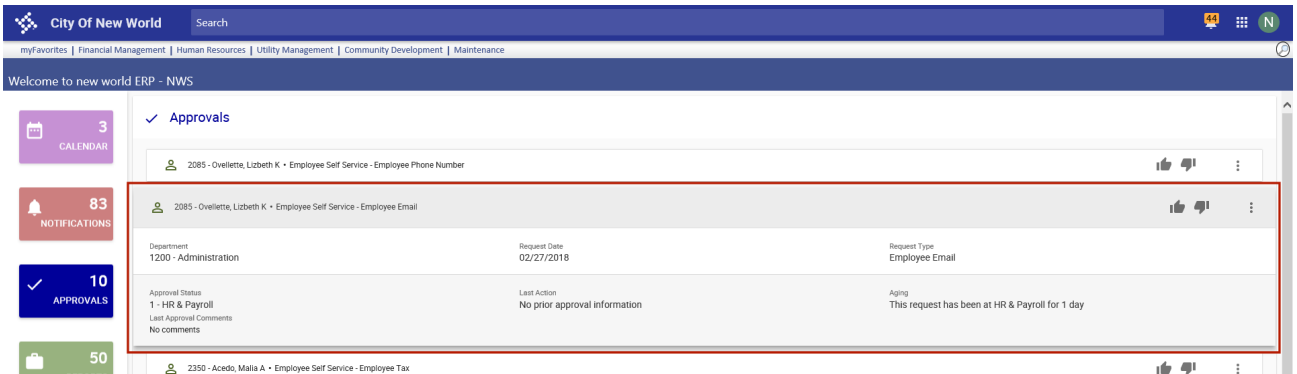


The screenshot shows the 'Approvals' page. On the left, there's a sidebar with icons for Calendar (3), Notifications (83), Approvals (10), Reports (50), and Notes (0). The main area is titled 'Approvals' and shows a list of tasks. Each task is represented by a card with a task type icon on the left, a description in the middle, and action icons (thumbs up, thumbs down, and a refresh icon) on the right. The tasks include items like 'Employee Self Service - Employee Phone Number', 'Employee Self Service - Employee Email', 'Employee Self Service - Employee Tax', etc.

A **task type icon** is displayed on the left side of each card. Hovering over the icon displays the name of the task type.



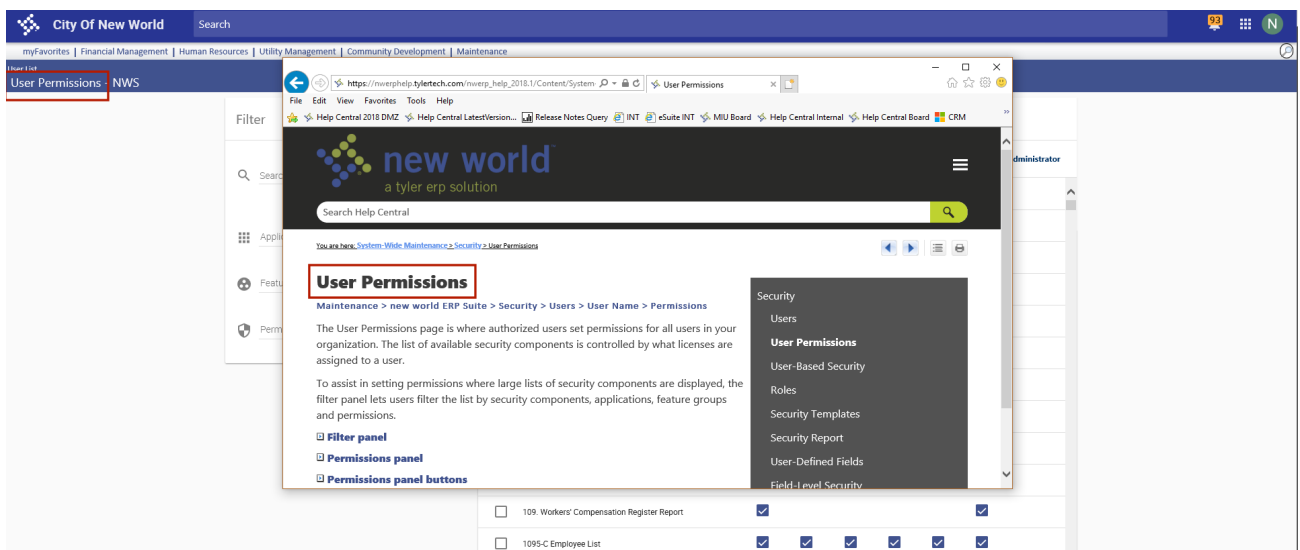
To **view the primary details** of a task, click the corresponding card to expand it.



The right side of each card displays icons to approve  or reject  the task and a **More actions** menu  to navigate  to the page linked to the task or delete  the task.

Help ?

The Help icon opens **help** for the page you are viewing.



Once there, you have access to any information housed in New World ERP Help Central by using the **search field** centered above the help content or the menu  in the top-right corner.

Search Help Central

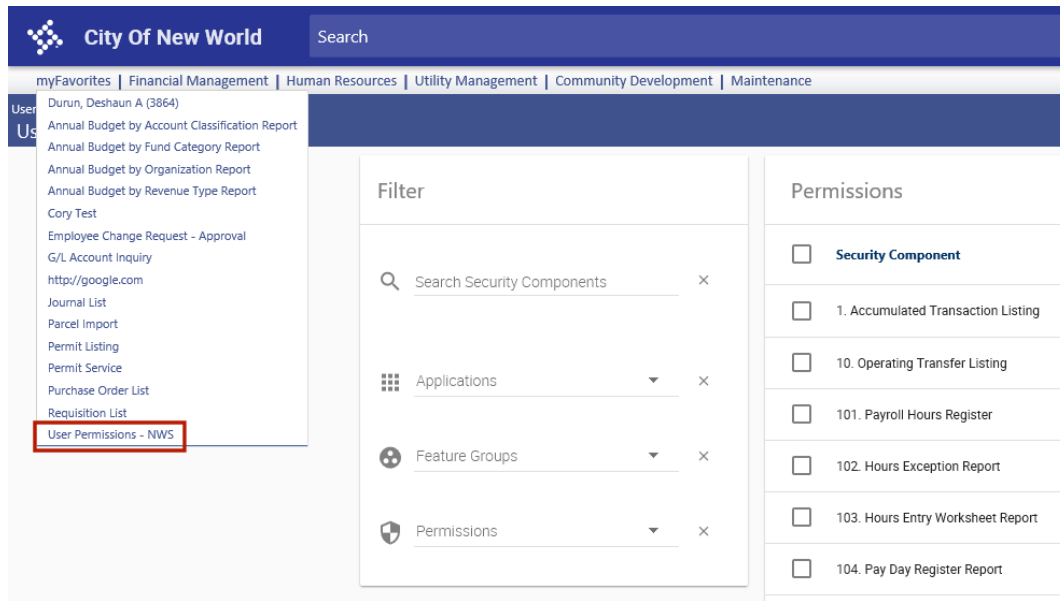


You also may click the company logo  in the top-left corner to navigate to the [Help Central home page](#).



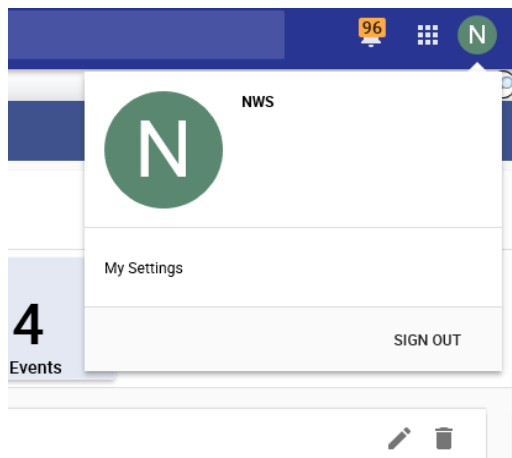
Add Favorite

To save the page you are viewing as a favorite, click this icon. The page is added to your [list of myFavorites](#) on the far-left side of the menu bar and on the mySettings panel, where you may rename or remove it from myFavorites (see [User Settings and Sign Out](#) below).



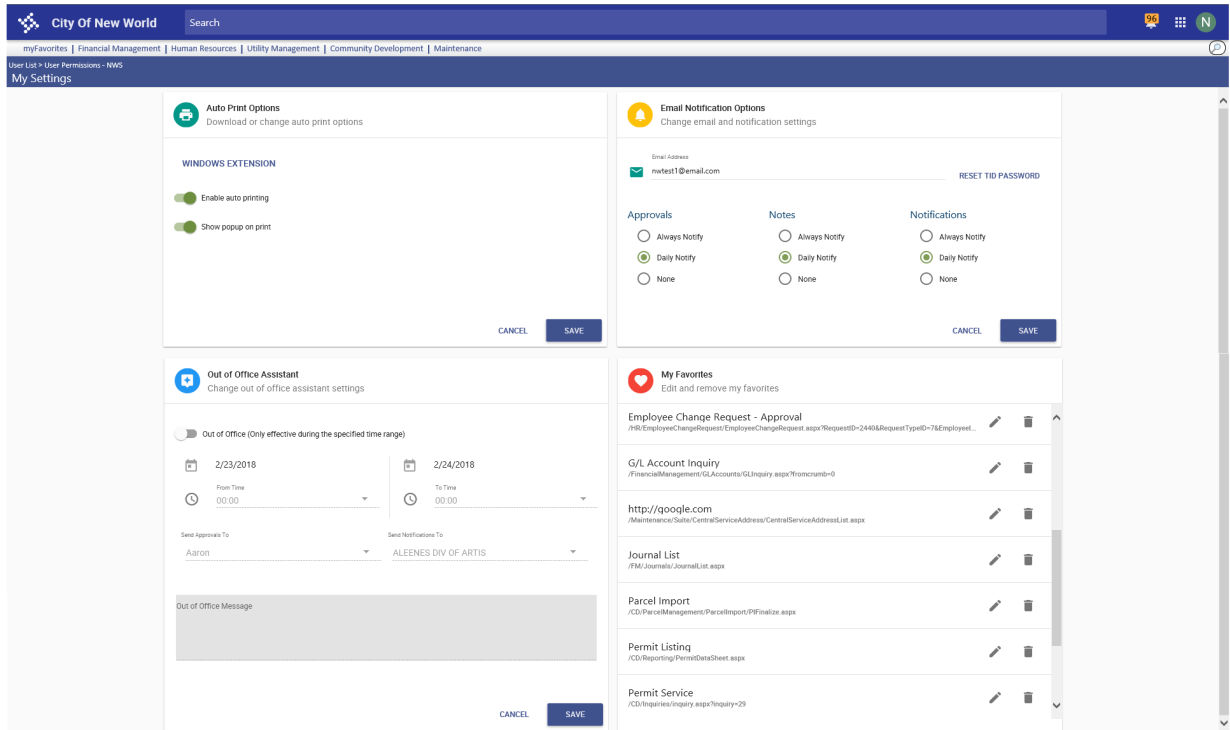
User Settings and Sign Out

Imprinted with the first letter of your user name, this icon gives you **options** to navigate to your mySettings page and to sign out of the system.



mySettings

Clicking this option takes you to your **mySettings page**, where you may view and manage your auto-print options, email notification options, Out of Office Assistant and favorites.



City Of New World Search

my favorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

User List > User Permissions > NWS

My Settings

Auto Print Options
Download or change auto print options

WINDOWS EXTENSION

☒ Enable auto printing

☒ Show popup on print

CANCEL SAVE

Email Notification Options
Change email and notification settings

Email Address: RESET TID PASSWORD

Approvals ☐ Always Notify ☒ Daily Notify ☐ None	Notes ☐ Always Notify ☒ Daily Notify ☐ None	Notifications ☐ Always Notify ☒ Daily Notify ☐ None
--	--	--

CANCEL SAVE

Out of Office Assistant
Change out of office assistant settings

☐ Out of Office (Only effective during the specified time range)

2/23/2018 2/24/2018

From Time To Time
00:00 00:00

Send Approvals To: Aaron Send Notifications To: ALEENES DIV OF ARTIS

Out of Office Message

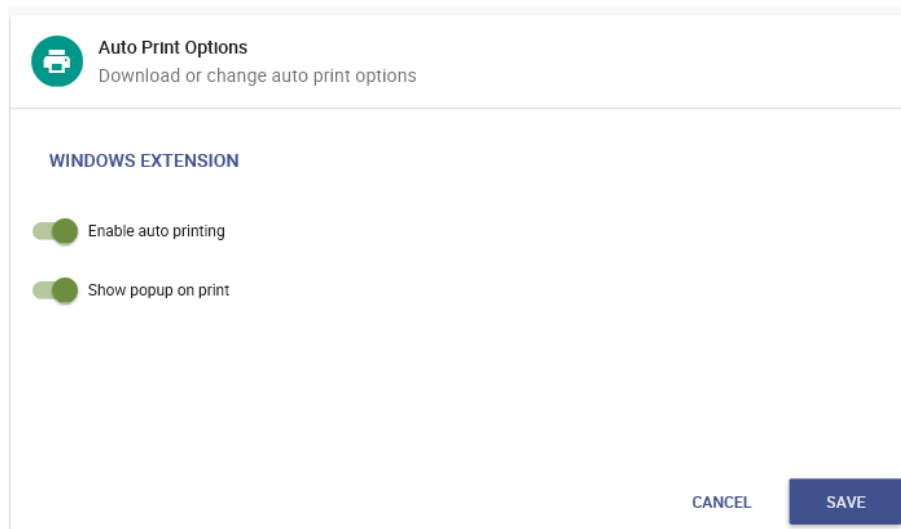
CANCEL SAVE

My Favorites
Edit and remove my favorites

Employee Change Request - Approval /HS/EmployeeChangeRequest/EmployeeChangeRequest.aspx?RequestID=2440&RequestTypeID=7&Employee...	
G/L Account Inquiry /FinancialManagement/GLAccounts/GLInquiry.aspx?fromnumb=0	
http://google.com /Maintenance/Suite/CentralServiceAddress/CentralServiceAddressList.aspx	
Journal List /FM/Journals/JournalList.aspx	
Parcel Import /CD/ParcelManagement/ParcelImport/PdfFinalize.aspx	
Permit Listing /CD/Reporting/PermitDataSheet.aspx	
Permit Service /CD/Inquiries/Inquiry.aspx?Inquiry=20	

Auto Print Options

If you do not have your printer set up on a network or print receipts for point-of-sale operations and use the local printer auto-printing feature, use the **Auto Print Options panel** to manage settings.



Auto Print Options
Download or change auto print options

WINDOWS EXTENSION

☒ Enable auto printing

☒ Show popup on print

CANCEL SAVE

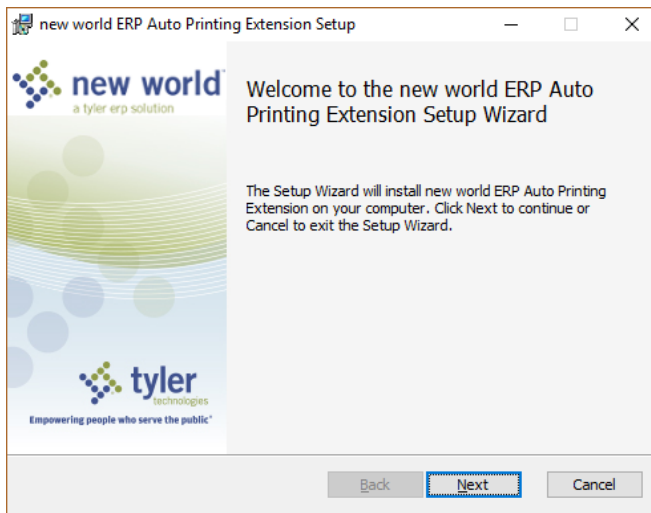
When setting up a new computer using a printer that is not on the network, you need to run the Auto Printing Extension installer package to use the Auto Print Options feature.

Steps

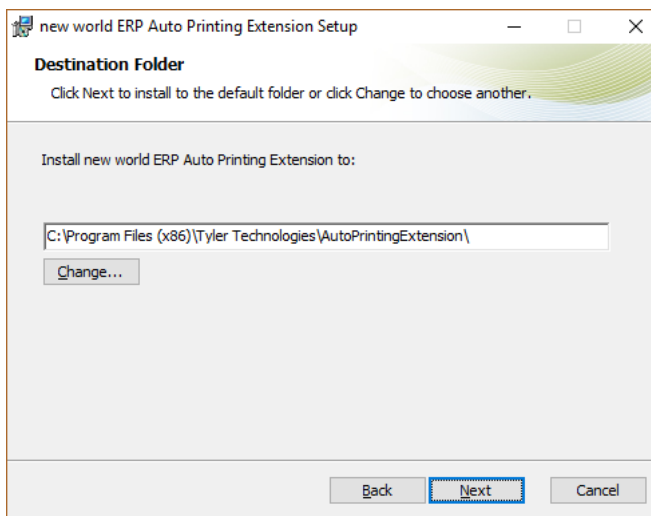
1. Click the **WINDOWS EXTENSION** link on the Auto Print Options card. The **"run or save" prompt** displays.



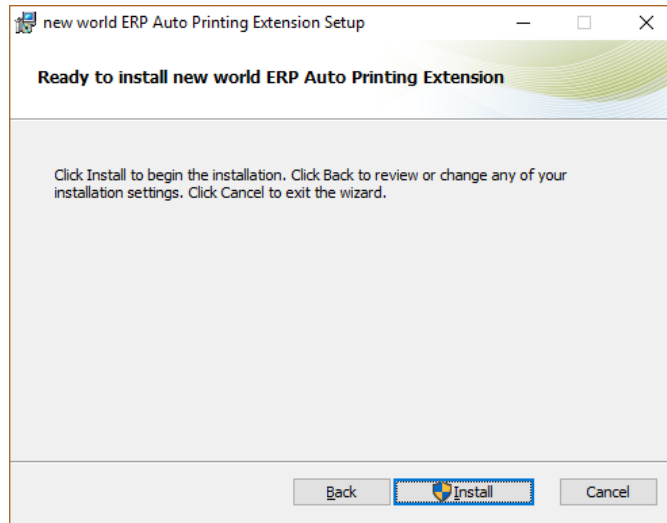
2. Click **Run**. The **New World ERP Auto Printing Extension Setup Wizard** opens.



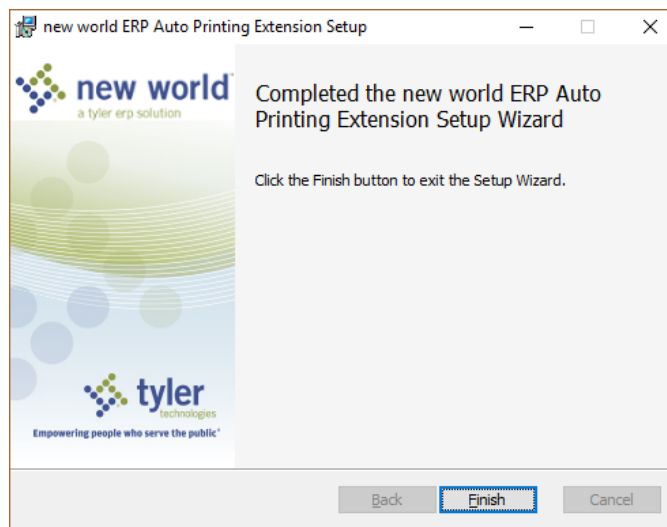
3. Click **Next**. The **Destination Folder** dialog opens.



4. Accept the default folder for the Auto Printing Extension, or click **Change** to select a different folder.
5. Click **Next**. The **"Ready to install" dialog** opens.

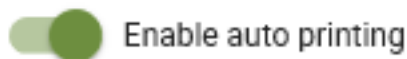


6. Click **Install**. A **final dialog** tells you when the process has finished.

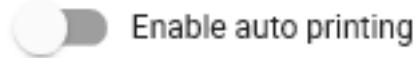


7. Click **Finish** to exit the setup wizard.

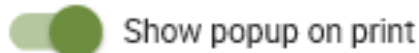
To have documents sent directly to the printer, select *Enable auto printing*:



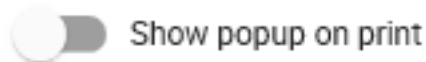
To have the browser print dialog open instead of having documents sent directly to the printer, deselect *Enable auto printing*:



If you want the Auto Print Options settings card to display when a print job is submitted, giving you the option to edit settings at that time, select *Show popup on print*:



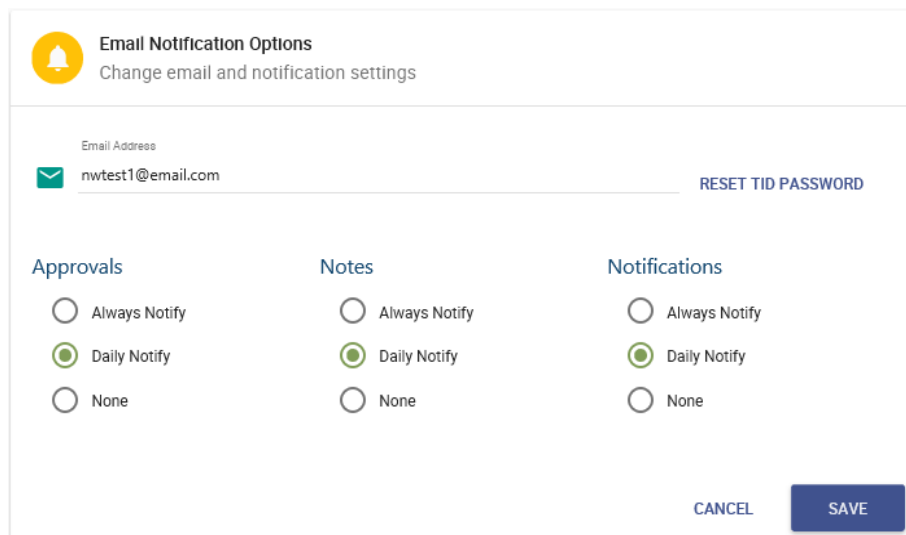
If you do not want the card to display, deselect *Show popup on print*:



Click **SAVE** to save your settings.

Email Notification Options

Use the **Email Notification Options panel** to set up how often you are notified by email when an event occurs as defined in [Notification Manager](#). Event types are listed together on the panel so you may select settings for all types at once.



The screenshot shows the 'Email Notification Options' panel. At the top, there is a bell icon and the title 'Email Notification Options' with the subtitle 'Change email and notification settings'. Below this is an 'Email Address' field containing 'nwtest1@email.com' and a 'RESET TID PASSWORD' link. The panel is divided into three columns: 'Approvals', 'Notes', and 'Notifications'. Each column has three radio button options: 'Always Notify', 'Daily Notify', and 'None'. In the 'Daily Notify' option for each column, there is a green circle next to the text, indicating it is the selected option. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

The *Email Address* field contains your user email address.

Select one of the following notification options for **Approvals**, **Notes** and **Notifications**:

- » **Always Notify** Receive an email notification as each event occurs.
- » **Daily Notify** Receive all email notifications at one time during the day. The noti-

fications are sent to your email address at approximately midnight each day.

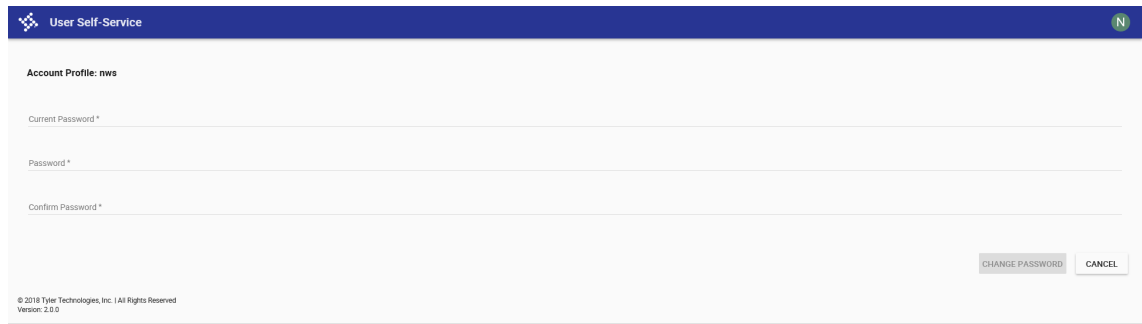
» **None** Do not receive email notifications.

An email notification includes a link to view the associated page in New World ERP.

Click **SAVE** to save your settings.

RESET TID PASSWORD

The Email Notification Options panel also provides a link to reset your Tyler Identity (TID) password (**RESET TID PASSWORD**). Clicking this link opens the **User Self-Service page**, where you will enter your current password and new password.



The screenshot shows the 'User Self-Service' interface. At the top, there's a blue header with the 'User Self-Service' title and a user icon. Below the header, the main content area is titled 'Account Profile: nws'. It contains three input fields: 'Current Password *', 'Password *', and 'Confirm Password *'. At the bottom right of the form, there are two buttons: 'CHANGE PASSWORD' and 'CANCEL'. In the bottom left corner, there is a small copyright notice: '© 2018 Tyler Technologies, Inc. | All Rights Reserved Version: 2.0.0'.

Out of Office Assistant

If you are going to be out of the office for a period of time and need someone else to address your tasks while you are out, use the **Out of Office Assistant panel** to set the date and time range of your absence, select the surrogate(s) who will handle your approvals and notifications and compose the out-of-office message users will receive automatically when sending approvals and notifications to you.

 **Out of Office Assistant**
Change out of office assistant settings

☐ Out of Office (Only effective during the specified time range)

 2/23/2018

 From Time
00:00

 2/24/2018

 To Time
00:00

Send Approvals To
Aaron

Send Notifications To
ALEENES DIV OF ARTIS

Out of Office Message

CANCEL

SAVE

To turn on the Out of Office Assistant and enable all fields for entry, select Out of Office:

☒ **Out of Office (Only effective during the specified time range)** . After completing your entries, click **SAVE**.

myFavorites

The **myFavorites panel** displays a list of all the pages you have marked as favorites. Page URLs are included.

 My Favorites Edit and remove my favorites		
Employee Change Request - Approval /HR/EmployeeChangeRequest/EmployeeChangeRequest.aspx?RequestID=2440&RequestTypeID=7&Employee...		
G/L Account Inquiry /FinancialManagement/GLAccounts/GLInquiry.aspx?fromcrumb=0		
http://google.com /Maintenance/Suite/CentralServiceAddress/CentralServiceAddressList.aspx		
Journal List /FM/Journals/JournalList.aspx		
Parcel Import /CD/ParcelManagement/ParcelImport/PIFinalize.aspx		
Permit Listing /CD/Reporting/PermitDataSheet.aspx		
Permit Service /CD/Inquiries/inquiry.aspx?inquiry=29		

You have options to edit and remove favorites.

To edit the name of a favorite, click the pencil icon  to the right of the name. The **Edit Favorite dialog** opens. Type the new name and click **SAVE**.

Edit Favorite 

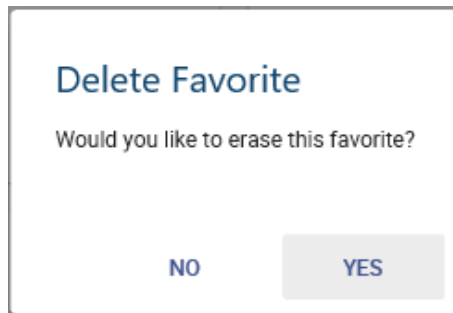
Favorite Name

 Employee Change Request - Approval

CANCEL

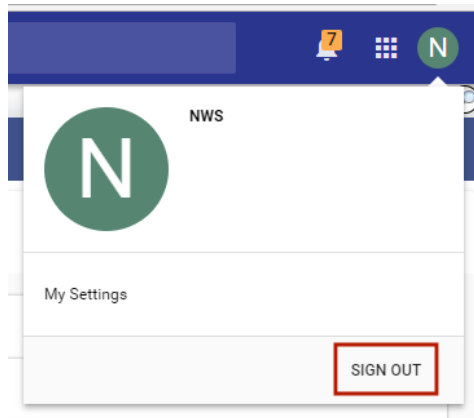
SAVE

To remove a favorite, click the trash can icon  to the right of the name. The **Delete Favorite dialog** opens, asking you to confirm whether you want to remove the page from your favorites list.



SIGN OUT

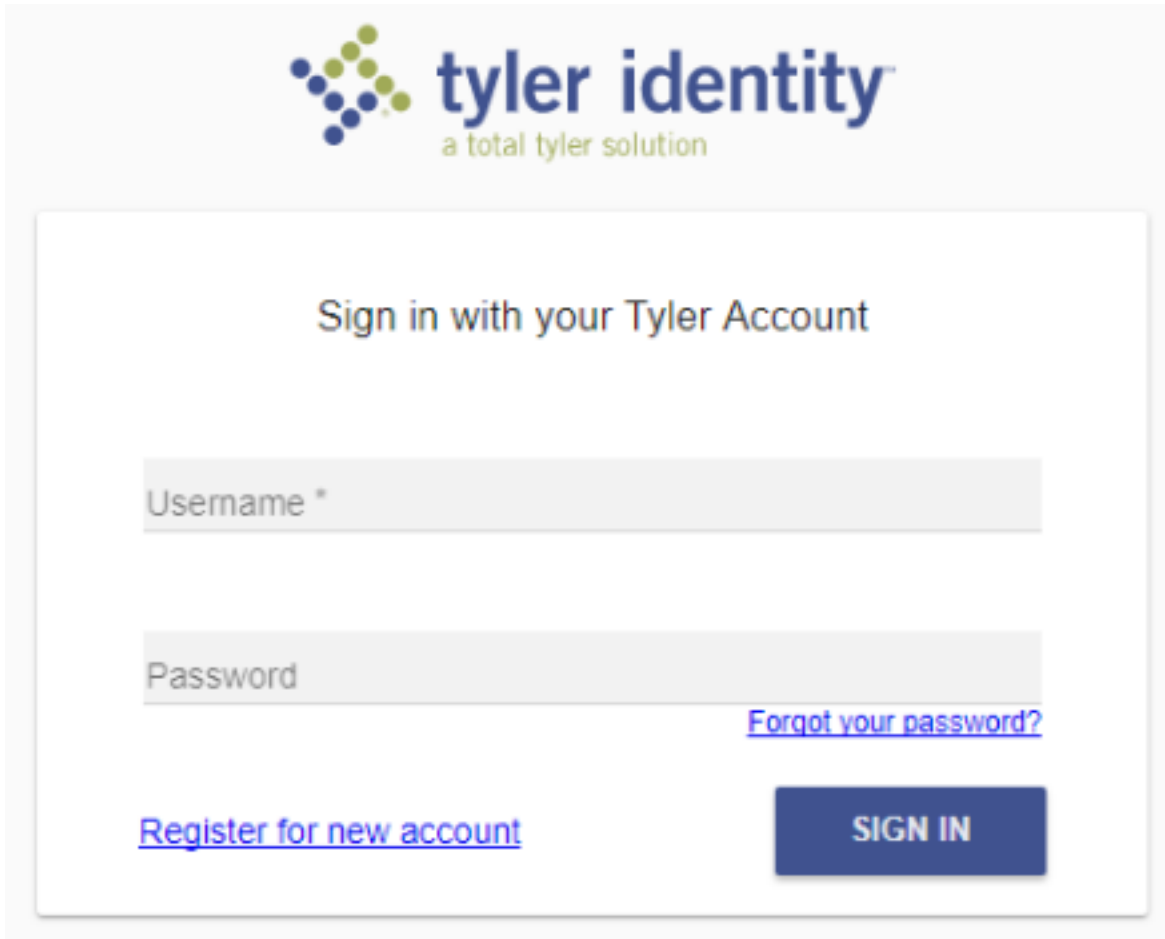
Click the **SIGN OUT button** to sign out of the system.



Signing out takes you back to the New World ERP login page.

New Sign-In

Security has been enhanced through the implementation of the Tyler-wide Tyler Identity (TID) product supporting single sign-on (SSO) across Tyler applications. A new sign-in screen reflects this enhancement. The sign-in is shared between Tyler Hub and New World ERP:



The image shows a login interface for 'tyler identity'. At the top, there is a logo consisting of a cluster of blue and green dots to the left of the text 'tyler identity' in a bold, blue, sans-serif font. Below this, in a smaller green font, is the tagline 'a total tyler solution'. The main content area is a white box with a thin grey border. Inside this box, the text 'Sign in with your Tyler Account' is centered. Below this text are two input fields: the first is labeled 'Username *' and the second is labeled 'Password'. To the right of the password field is a blue hyperlink that reads 'Forgot your password?'. At the bottom left of the white box is another blue hyperlink that reads 'Register for new account'. At the bottom right is a dark blue rectangular button with the text 'SIGN IN' in white, uppercase letters.

After signing in once via Hub or ERP, you will not have to sign in again to access the other application.

NEW FEATURES DELIVERED VIA 2017.1 MIU

Community Development

eLicensing

Show License History

eLicensing > License & Payment

A **SHOW LICENSE HISTORY** button has been added to the **Select licenses for payment** grid:

 eSuite Licensing
Powered by Tyler Technologies



License & Payment
LICENSE & PAYMENT PAGE - CONTENT MANAGEMENT CONFIGURATIONS

Information for Licensee

Licensee
b larry cw Animal

Licensee Type Code
Animal

Licensee Address
8924 DONNER PASS RD
TRUCKEE, CA 96101

[DOCUMENTS](#)

Items to pay
There are no licenses selected for payment.

Payment Amount

Fee Amount	\$0.00
Service Charge	\$0.00
Total	\$0.00

☐ I certify the information to be true and correct.

[PRINT RECEIPT](#) [PAY WITH CREDIT CARD](#)

Select licenses for payment

[SHOW LICENSE HISTORY](#)

Payment Status	License Type	License Number	Renewal Number	License For	Effective Date - Expiration Date	Amount Charge Due Detail	Pet Info
Unpaid	Animal	1	2018-00000001	Doggie - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$0.00	
Unpaid	Animal	2	2018-00000002	Doggie - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$0.00	
Paid/Original	Animal	8	2017-00000008	2nd Doggie - 8924 DONNER PASS RD	1/1/2017 - 12/31/2017	\$17.25	
Paid/Original	Animal	10	2018-00000021	2nd Doggie - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$17.25	
Paid/Original	Animal Flexible	16	2018-00000008	2nd Doggie - 8924 DONNER PASS RD	1/1/2018 - 2/10/2018	\$10.00	
Paid/Original	cw Business	31	2018-00000114	cw Animal - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$25.00	
Paid/Original	cw Flexible	19	2018-00000002	b larry cw Animal - 8924 DONNER PASS RD	1/1/2018 - 1/31/2018	\$10.00	

By default, the grid shows current and unpaid licenses only. Click this button to include **paid, expired licenses**:



Logout

Information for Licensee

Licensee
b larry cw Animal

Licensee Type Code
Animal

Licensee Address
8924 DONNER PASS RD
TRUCREE, CA 95161

DOCUMENTS

License & Payment

LICENSE & PAYMENT PAGE - CONTENT MANAGEMENT CONFIGURATIONS

Items to pay
There are no licenses selected for payment.

Payment Amount

☐ I certify the information to be true and correct.	Fee Amount	\$0.00
	Service Charge	\$0.00
	Total	\$0.00

PRINT RECEIPT PAY WITH CREDIT CARD

Select licenses for payment

HIDE LICENSE HISTORY

Payment Status	License Type	License Number	Renewal Number	License For	Effective Date - Expiration Date	Amount Charge Due Detail	Pet Info
Paid/Original	Animal	1	2017-00000001	Doggie - 8924 DONNER PASS RD	1/1/2017 - 12/31/2017	\$0.00	
Unpaid	Animal	1	2018-00000001	Doggie - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$0.00	
Paid/Original	Animal	2	2017-00000002	Doggie - 8924 DONNER PASS RD	1/1/2017 - 12/31/2017	\$0.00	
Unpaid	Animal	2	2018-00000002	Doggie - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$0.00	
Paid/Original	Animal	8	2017-00000008	2nd Doggie - 8924 DONNER PASS RD	1/1/2017 - 12/31/2017	\$17.25	
Paid/Original	Animal	10	2018-00000021	2nd Doggie - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$17.25	
Paid/Original	Animal Flexible	16	2018-00000008	2nd Doggie - 8924 DONNER PASS RD	1/1/2018 - 2/10/2018	\$10.00	
Paid/Original	cw Business	31	2018-00000114	cw Animal - 8924 DONNER PASS RD	1/1/2018 - 12/31/2018	\$25.00	
Paid/Original	cw Flexible	19	2018-00000002	b larry cw Animal - 8924 DONNER PASS RD	1/1/2018 - 1/31/2018	\$10.00	

Once clicked, the button label changes to **HIDE LICENSE HISTORY**. Click it to restore the default view.

Inspections

Add Citation Customer Address

Community Development > Inspections > Inspection List/Search > Case Inspection
> Inspection Details > Citations > Add Citation

Selecting a customer from the *Customer to be Billed* drop-down on the **Add Citation page** displays the customer's address in read-only format below the field.

Add Citation

Customer to be Billed

101 - DMG Development

11637 Dolomite Way
TRUCKEE, CA 96161

Citation Fees ★

Select a fee to add...

Total Fee Amount \$0.00

Remove Save Cancel

Case Details Parcel Owner

Community Development > Inspections > Inspection List/Search > Case Inspection > Details Link

The parcel owner name and address have been added to the **Contacts** tab of the **Case Details pop-up**.

Case Details

Case	Complaint - Complaint - 2010-00003528
Location	1522 NUTWOOD ST Troy, MI 48084-5418 1522 Nutwood st.
Status	Inactive
Resolution Date	07/07/2010
Resolution Reason	X In Compliance

Details Contacts Documents Comments History

Parcel Owner
SERVICE ONE CREDIT UNION INC
709 RIDGECREST WAY
Troy, MI 48084

Reported By
Anonymous

Cancel

Create Inspection Email Notification

Community Development > Inspections > Inspection List/Search > Create

The **Add/Edit Notification dialog** in Inspection Maintenance has been enhanced to allow an *Inspection Event* of **Created** to trigger email notifications when an inspection is created from the Inspection List/Search or service pages.

Edit Notification

Notification Name

Inspection Event

Failed ×

Conditional Pass ×

Passed ×

Appointment Canceled ×

Inspector Reassignment ×

Reinspection Created ×

Scheduled ×

Report Created ×

Created ×

Inspection Template

101 - Site Compliance ×

801 - Final ×

909 - Note to Inspector (NTI) ×

CC Inspection - Code Compliance ×

cw IT 1 ×

cw New IT ×

DBS with mult compliance items ×

Notifications also are sent for inspections that are added during the adding or editing of a **parent type**, such as a permit, case or license.



[myfavorites](#) | [Financial Management](#) | [Human Resources](#) | [Utility Management](#) | [Community Development](#) | [Maintenance](#)

428

Add Permit

Permit: Commercial Addition - 2018.00000004

Parcel: Truckee 19-140-20-000

Service Address: 10001 S RIVER ST
TRUCKEE, CA 96161

Parcel Owner: GOWERDER MARTIN L & MARGARET TIRSTES

Location: Subdivision

Lot Number

Description

Status: Application Created

Printed / Paid: No / No

Amount: \$0.00

Issued To: Contractor

Location

Contractor

Other Party

Property

Application Checklists

UDFs

Inspections

Fees

Process

Requested From Date: 02/12/2018

Requested To Date: 02/12/2018

Inspection Template	Level	Final Inspection	Responsible Department
☐ 101 - Site Compliance	1		Responsible department
☐ 104 - Temporary Power Pole	1		Responsible department
☐ 105 - Demolition/Pre-Inspection	1		Responsible department
☐ 106 - Underground Sewer	1		Responsible department
☐ 107 - Underground Water	1		Responsible department
☐ 108 - Underground Electrical	1		Responsible department
☐ 100 - BMP / Erosion Protection	1		Responsible department
☐ 802 - DBI Conference	1		Responsible department
☐ 109 - Underground Gas	1		Responsible department
☐ 804 - Meter Connect	1		Responsible department
☐ 805 - Driveway Final	1		Responsible department
☐ 806 - Driveway Sub-grade	1		Responsible department
☐ 807 - Energy	1		Responsible department
☐ 812 - Disabled Access	1		Responsible department
☐ 206 - Retaining Wall	2		Responsible department
☐ 203 - Footings & Stemwalls	2		Responsible department

☐ Options 56 Rows

Previous
Next
Reset Tab



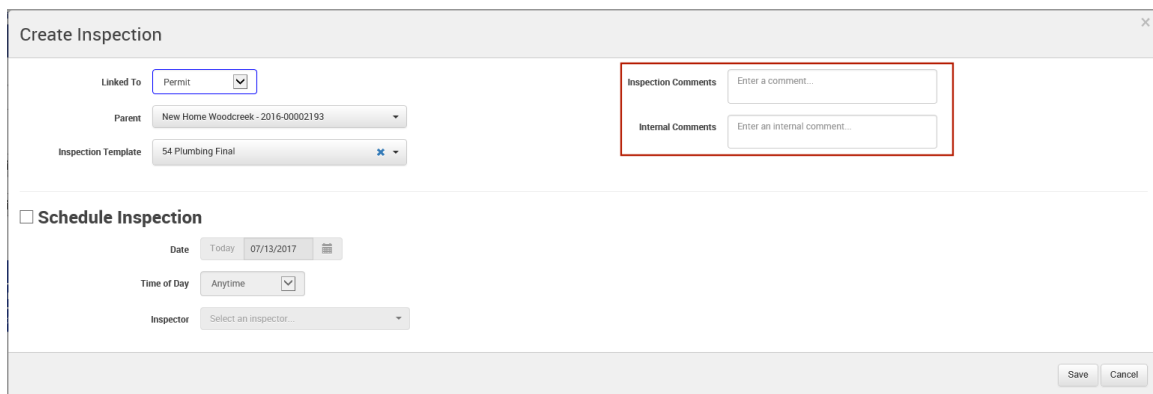
Note: This enhancement applies to all parent types that allow inspections to be created during the parent creation.

Create Inspection Enhancements

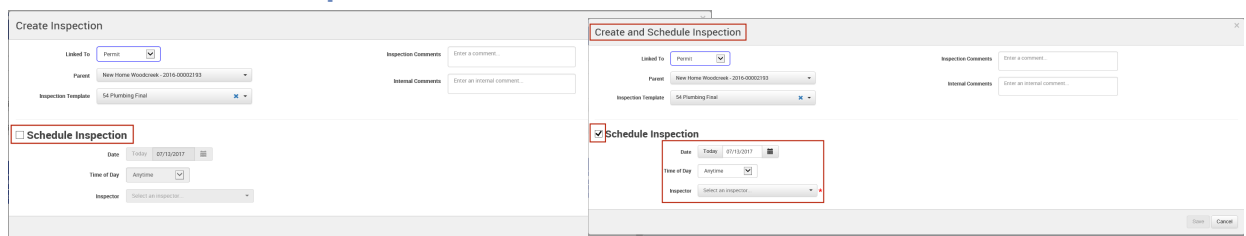
Community Development > Inspections > Inspection List/Search > Create

The Create Inspection dialog has been enhanced as follows:

- » To give you the option of adding comments when creating an inspection, **Inspection Comments** and **Internal Comments** fields have been added to the upper-right side of the dialog.



- » A **Schedule Inspection** check box has been added as a header for the inspection scheduling fields. By default, these fields are disabled until you select the check box. Selecting the check box also changes the title of the dialog from Create Inspection to **Create and Schedule Inspection**.



Note: When the Create Inspection dialog is opened from the Inspection Scheduler or the Inspector Planner, the *Schedule Inspection* check box is selected and disabled by default.

- » Selecting an *Inspector* displays the inspector's calendar at the bottom of the dialog.

Watch.

The calendar also scrolls automatically to the inspector's starting hour as set up on the **Schedule Information** tab of the inspector's profile in Inspection Maintenance, and the full hours schedule displays.



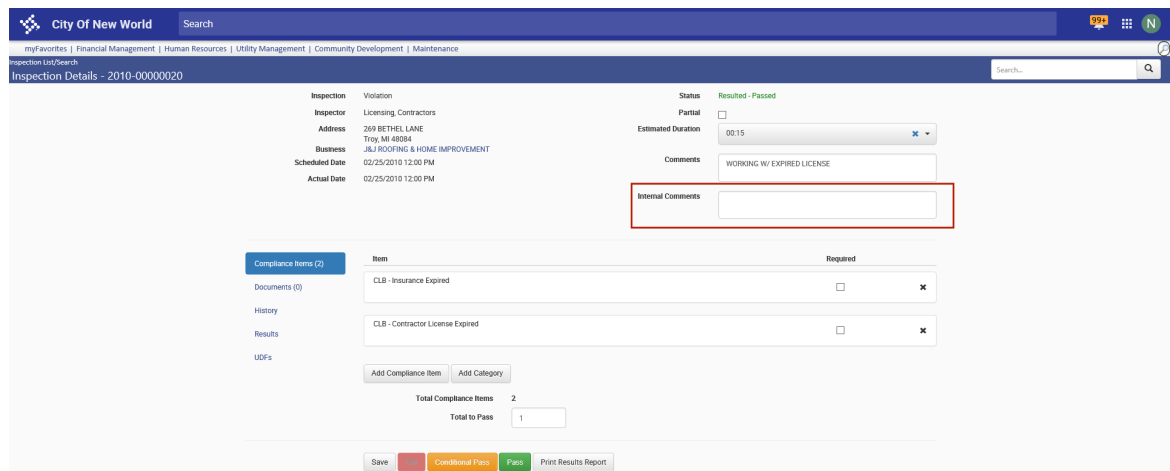
Note: If the user also is an inspector, selecting the *Schedule Inspection* check box defaults the user's name in the *Inspector* field.

Inspection Details Enhancements

Community Development > Inspections > Inspection List/Search > Inspection

The Inspection Details page has been enhanced as follows:

- » To give you the option to compose comments that are not public-facing but meant for internal review only, an **Internal Comments** field has been added to the upper-right side of the page.

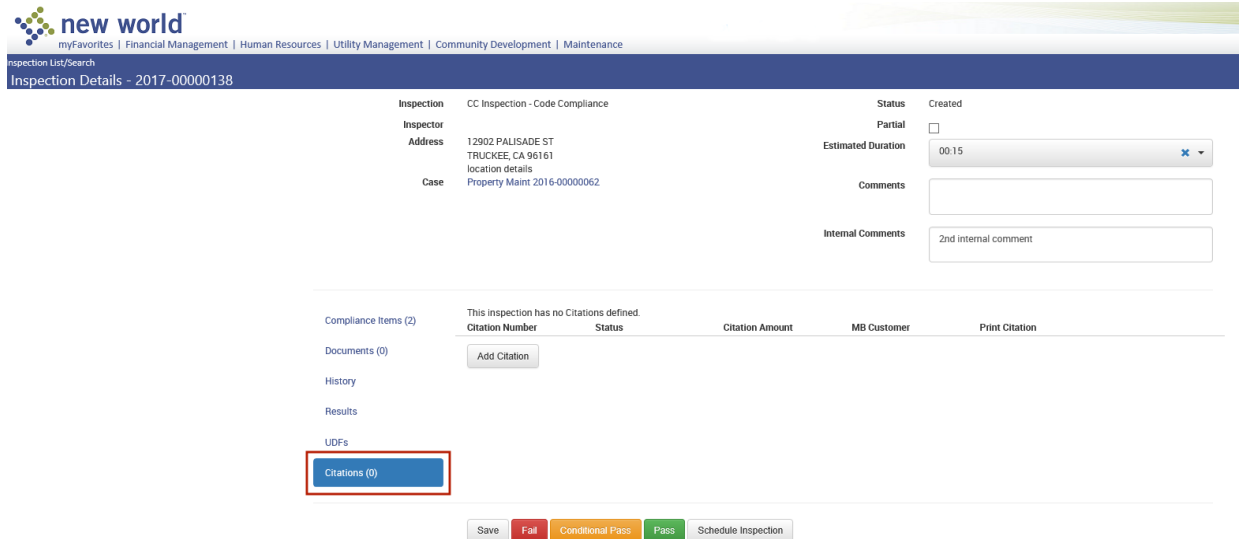


This field also is available on the Create Inspection dialog.

When an inspection card is expanded on the Inspection List/Search page or the *History* link is selected on the Inspection Details page, *Internal Comments* are labeled as such. The Inspection Worksheet and mail merge worksheet templates have been updated to include internal comments.

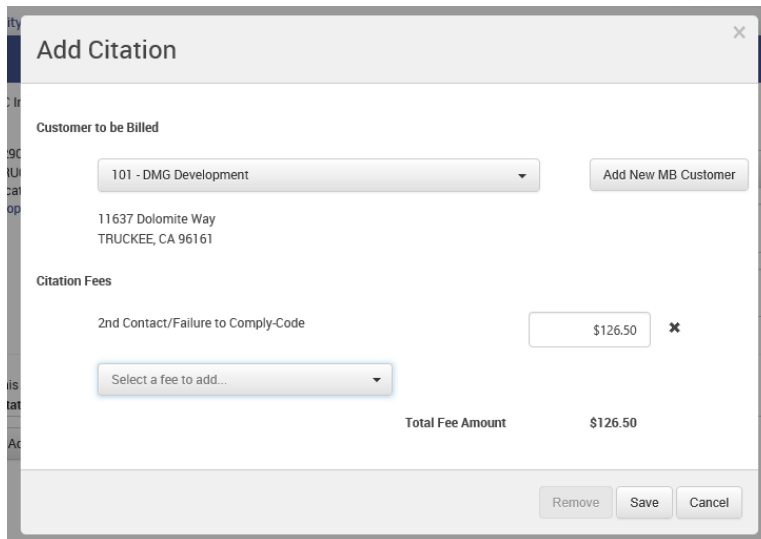
- » When a compliance item is failed from the **Results** tab, it expands automatically to display the **Codes in Violation** grid and the **Add Row** button. **Watch.**

- » For Case Inspections, the **Add Citation** button has been moved to a new **Citations tab** on the left side of the page.



The screenshot shows the 'Inspection Details - 2017-00000138' page. The sidebar on the left contains the following tabs: Compliance Items (2), Documents (0), History, Results, UDFs, and Citations (0). The 'Citations (0)' tab is highlighted with a red box. The main content area shows inspection details for 'CC Inspection - Code Compliance' at '12902 PALISADE ST TRUCKEE, CA 96161'. It includes fields for 'Status' (Partial), 'Estimated Duration' (00:15), 'Comments', and 'Internal Comments'. At the bottom, there are buttons for 'Save', 'Fail', 'Conditional Pass', 'Pass', and 'Schedule Inspection'.

With this tab, you may add multiple citations to an inspection record. Clicking the button opens the **Add Citation dialog**.



The 'Add Citation' dialog box is shown. It has a title bar with a close button. The main content area includes a 'Customer to be Billed' section with a dropdown menu showing '101 - DMG Development' and an 'Add New MB Customer' button. Below this is the address '11637 Dolomite Way TRUCKEE, CA 96161'. The 'Citation Fees' section has a dropdown menu showing '2nd Contact/Failure to Comply-Code' and a text box showing '\$126.50'. A 'Total Fee Amount' of '\$126.50' is displayed at the bottom. At the very bottom are 'Remove', 'Save', and 'Cancel' buttons.

When you save the citation, it is added to a **grid** on the tab, and the **Add Citation** button remains available.

Inspection CC Inspection - Code Compliance

Inspector

 Address 12902 PALISADE ST
TRUCKEE, CA 96161
location details

Case Property Maint 2016-00000062

Status Created

 Partial ☐

Estimated Duration

00:15

Comments

Internal Comments

2nd internal comment

Compliance Items (2)

Documents (0)

History

Results

UDFs

Citations (1)

Citation Number	Status	Citation Amount	MB Customer	Print Citation
2018-00000005	Issued - 03-12-2018	\$126.50	DMG Development	Print Citation Report

Add Citation

Save Fail Conditional Pass Pass Schedule Inspection



Note: You may edit a citation until it is added to a batch.

A **Print Citation Report button** is available in the *Print Citation* column for printing mail merge reports that have been set up for citations. Clicking the button opens a **menu of report selections**.

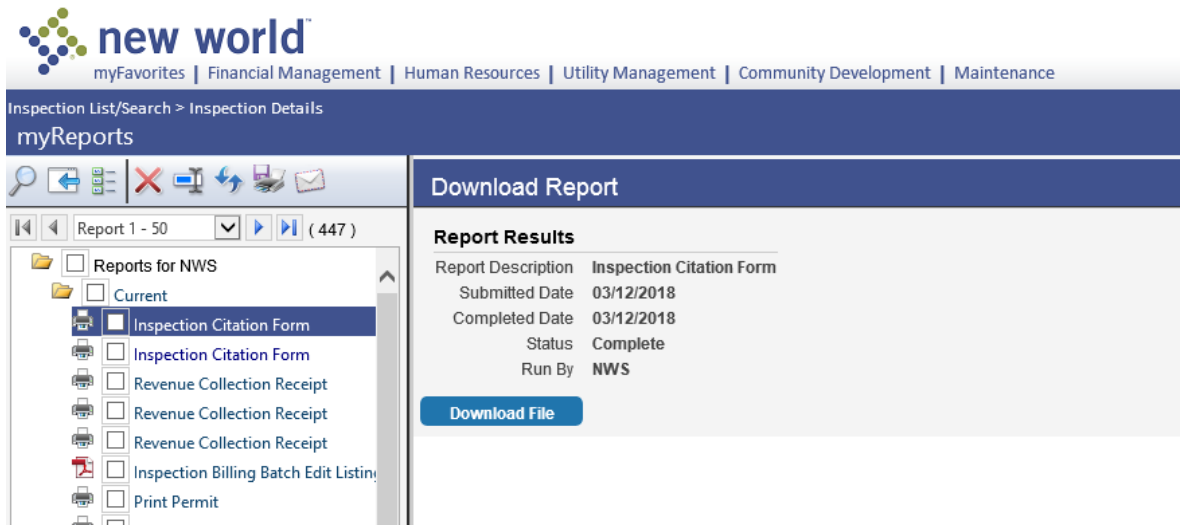
Citation Number	Status	Citation Amount	MB Customer	Print Citation
2018-00000005	Issued - 03-12-2018	\$126.50	DMG D	Print Citation Print Citation Report

Add Citation

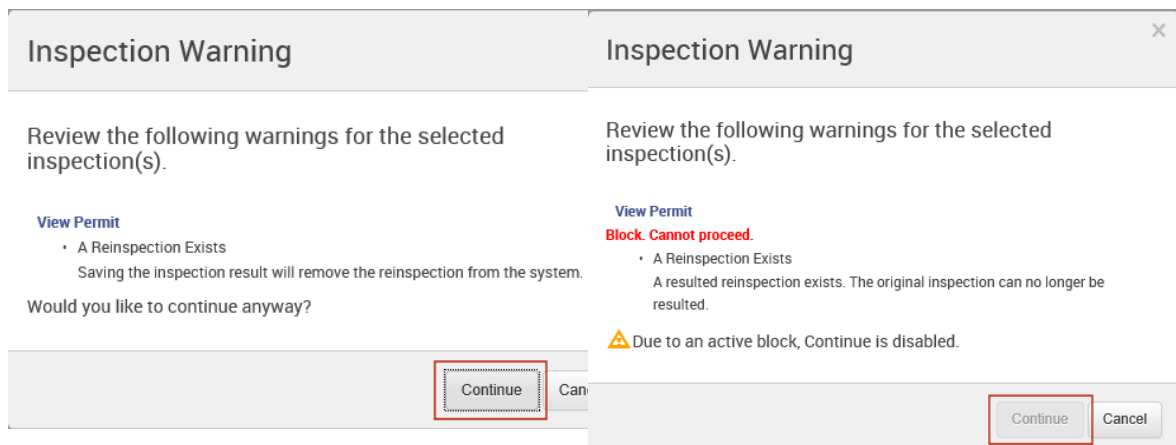
Citation Number	Status	Citation Amount	MB Customer	Print Citation
2018-00000005	Issued - 03-12-2018	\$126.50	DMG Development	DBS DBS Citation

Add Citation

Reports are sent to **myReports**.



- » A user who tries to complete an inspection that is associated with an open reinspection receives a **warning** that saving the inspection result will remove the reinspection from the system. The user has the option to continue or cancel. A user who tries to complete an inspection that is associated with a completed reinspection receives a **warning** but may not continue.



Inspection Results Report Permit Issued To Address

Maintenance > new world ERP Suite > System > Mail Merge Templates

The **Inspection Results mail merge rtf template** has been updated to pull in the *Permit Issued To* address.

```

[[#start:letter]][[pagebreak]]

[[date]]

[[InspectionAcknowledgedBy]]
[[CentralServiceAddress]]
[[City]] [[State]] [[Zip]]

Inspection:      [[InspectionTypeCode]] - [[InspectionTypeDescription]] -
[[InspectionNumber]]

Inspector:      [[InspectorFirstName]] [[InspectorMiddleName]] [[InspectorLastName]]
[[InspectorvsNameSuffixDesc]]

Scheduled:      [[ScheduledAtDate]]
                from [[ScheduledAtStartTime]] till [[ScheduledAtEndTime]]

Actual:         [[ConductedOnDate]]
                from [[ConductedOnStartTime]] till [[ConductedOnEndTime]]

Results:        [[InspectionResults]]

Sources:        [[SourceType]]
                [[SourceDetail]]

Parcel Number:  [[ParcelNumber]]
Subdivision:    [[ParcelSubDivision]]
Lot Number:     [[PermitLotNumber]]

Primary Owner:  [[PrimaryOwnerName]]
                [[PrimaryOwnerAddress]]
                [[PrimaryOwnerCity]], [[PrimaryOwnerState]] [[PrimaryOwnerZip]]

Inspection Contact: [[Contact]]

Inspection Address: [[ParentAddress]]

Permit:         [[PermitTypeDescription]] [[PermitNumber]]

Permit Issued To: [[SourceTypeIssuedToName]]
Issued To Address: [[SourceTypeIssuedToAddressLineOne]]
                  [[SourceTypeIssuedToAddressLineTwo]]
                  [[SourceTypeIssuedToAddressLineThree]]
                  [[SourceTypeIssuedToCity]]
                  [[SourceTypeIssuedToState]]
                  [[SourceTypeIssuedToZip]]

```

Inspection Schedule Parent Contact

Community Development > Inspections > Inspector Planner > Inspection Schedule

A *Parent Contact* column has been added to the **Inspection Schedule** to give you the names, phone numbers and email addresses of the inspection parent contacts.

Inspection Schedule Report - Internet Explorer

1 of 1 100% Find | Next Send to myReports

Inspection Schedule

Monday, January 29, 2018

Carl, W
Monday, January 29, 2018

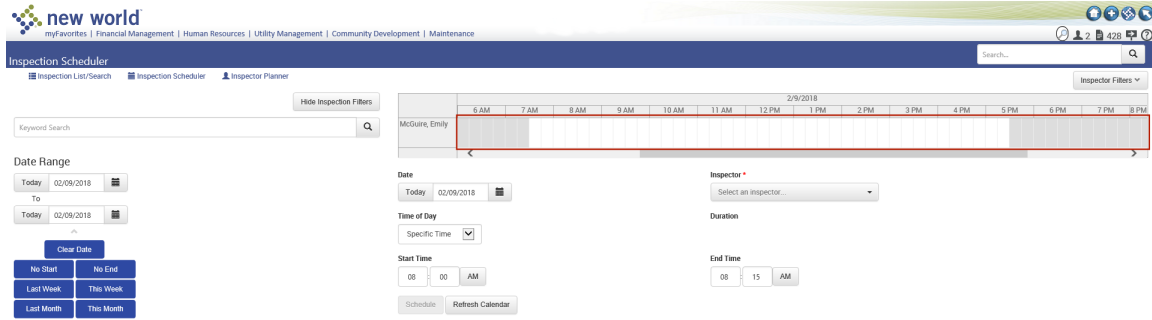
Address	Template	Parent	Parent Contact	Time	Inspection Number
10183 Truckee Airport RD TRUCKEE, CA, 96161	105 - Demolition/Pre-Inspection	Permit - 2015-00000317 - Single Family Residence	Parcel Owner Contact TRUCKEE TOWN OF Contractor Contact John Mac Construction 530527820 nwERP.jgoetz@townoftruckee.com Issued To JOHN MAC CONSTRUCTION Phone Override N/A Email Override N/A	AM	2016-00001337
11490 BOTTCHEE LOOP TRUCKEE, CA, 96161	806 - Driveway Sub-grade	Permit - 2016-00000121 - Single Family Residence - 1	Parcel Owner Contact ROBERTS RORY AND DIANE Issued To ROBERTS RORY AND DIANE Phone Override (916) 223-1375 Email Override nwERP.rrobertsconstruction@hotmail.com	Anytime	2016-00001777
14722 S SHORE DR TRUCKEE, CA, 96161	901 - Truckee Fire Dist Final	Permit - 2015-00000350 - Single Family Residence	Parcel Owner Contact STEARNS JAN C & ESTHER M TRSTES Contractor Contact RICHARD WAGNER & DAVID SMITH (530) 448-3157 nwERP.daves@rdpros.com Issued To R & D PROFESSIONALS Phone Override N/A Email Override nwERP.diarro@hoodthomas.com	9:00 AM	2016-00001540
11515 SAINT BERNARD DR TRUCKEE, CA, 96161	106 - Underground Sewer	Permit - 2016-00000153 - Single Family Residence - 1	Parcel Owner Contact BERNARD BIRD LLC Contractor Contact DBA: SUNRIVER HOMES (916) 759-9513 nwERP.rkooi@bearrivermtg.com	9:30 AM	2016-00001802

Inspection Scheduler AM/PM Wrapping

Community Development > Inspections > Inspection Scheduler

The Inspection Scheduler calendar has been enhanced as follows:

- » An inspector's **range of working hours** displays according to its setup on the Inspector Profile dialog in Maintenance, with areas outside working hours shaded in gray.



- » Inspections scheduled for AM or PM and not a specific time appear as **AM** and **PM** on the schedule. The AM notations begin in the first hour of the schedule, and the PM notations begin at noon. Instead of stacking vertically, the notations wrap, **appearing side by side**.

	2/12/2018							
	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM
McGuire, Emily AM: 4, 1 hrs PM: 2, 0.5 hrs	A M	A M	A M			P M	P M	

- » The **number of inspections and hours** for AM and PM display beneath the inspector's name.

	7 AM	8 AM
McGuire, Emily AM: 4, 1 hrs PM: 2, 0.5 hrs	A M	A M

Inspection Worksheet Enhancements

The SSRS **Inspection Worksheet** has been enhanced as follows:



Inspection Worksheet

Thursday, June 8, 2017

Address
2726 RUSSELLVILLE RD
Troy, MI, 48084

Inspection Template
IT 1

Inspection Number
2017-00000014

Scheduled Start
Thursday, June 8,
2017 (Anytime)

Inspector
Carl, W

6

Permit 2016-00001288

Permit Type Building
Commercial

Permit Description ALTER COMM
BLDG, MOHAMMAD
KILANI

Location

Inspection Results

Inspection Comments

☐ Partial
☐ Reinspection

Result Fail Conditional Pass Pass

Date/Time

Contacts

MURATOVIC, SABAHUDIN & MIRSADA	Contractor	(270) 779-3727
MOHAMMAD KILANI	Other party	
RUSHING PROPERTIES LLC	Parcel Owner	

Comments

Inspection Comments

Call Wail, 111.222.3333

(Internal) Call Sully, 444.555.6666

Parent Comments

ALTER COMMERCIAL BUILDING, MOHAMMAD KILANI

Alerts

Permit Conditions

Parcel Conditions

Compliance Items	Result	Comments
Uncategorized		
Compliance item 1	P F N/A	

Run by nws on 06/08/2017 03:48:32 PM

Page 1 of 1

- » The print order has been improved, showing inspections in the order of their scheduled times.
- » The SSRS worksheet and the mail merge worksheet template have been updated to include internal comments.

Inspector Planner Worksheets and Results Reports

Community Development > Inspections > Inspector Planner

The **Print Worksheets** and **Print Result Reports** buttons on the [Inspector Planner page](#) have been upgraded to have the same functionality as the buttons on the Inspection List page.

The screenshot shows the 'Inspector Planner' interface for the 'Town of Truckee'. The left sidebar contains a 'Views' section with 'Calendar' selected. The main area displays a calendar for 'Thompson, Jessica' with various inspection entries. At the bottom of the calendar area, there are buttons for 'Print Worksheets' and 'Print Result Reports', which are highlighted with a red box.

Selecting either button provides a **menu of report selections**.

The screenshot shows the 'Inspector Planner' interface for the 'Town of Truckee'. The left sidebar contains a 'Views' section with 'Calendar' selected. The main area displays a calendar for 'Thompson, Jessica' with various inspection entries. A dropdown menu is open, showing options like 'cw worksheet0102' and 'Standard (SSRS)', which are highlighted with a red box.

Maintenance

Notification Manager Inspections Process

Maintenance > new world ERP Suite > Notifications > Notification Manager

Inspections has been removed from the **Notification Manager Process** page.



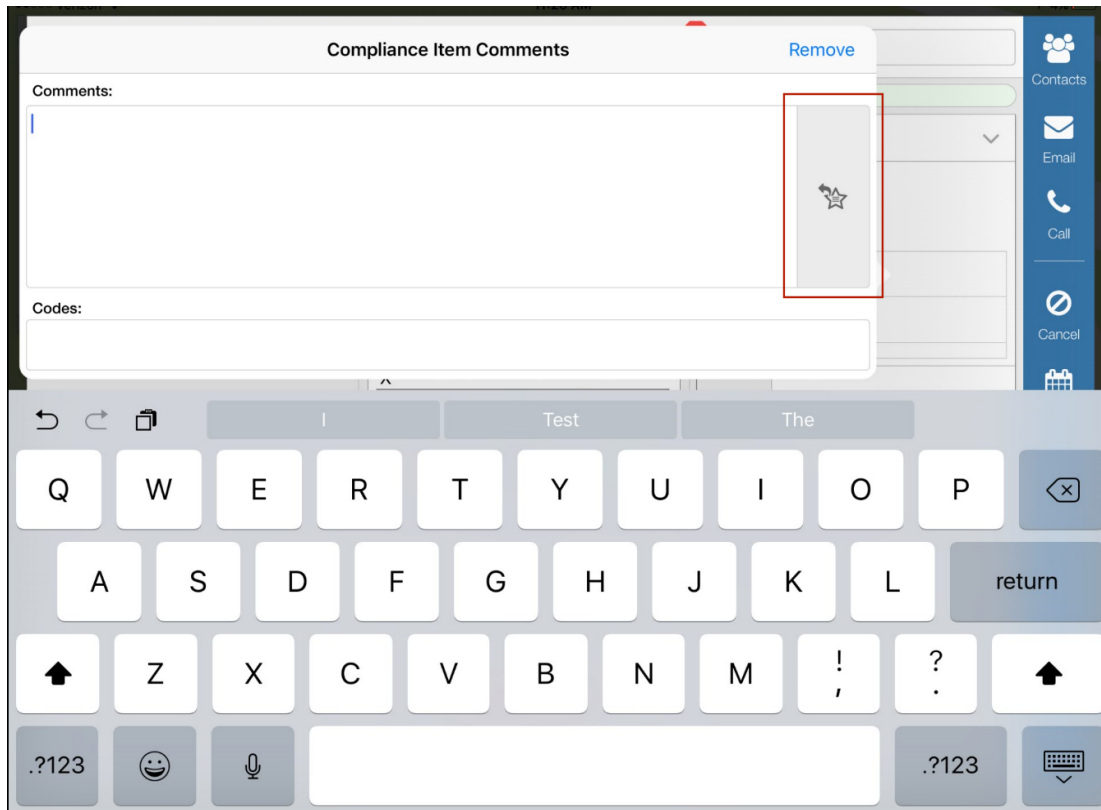
Notifications now are handled through Inspection Maintenance.

myInspections

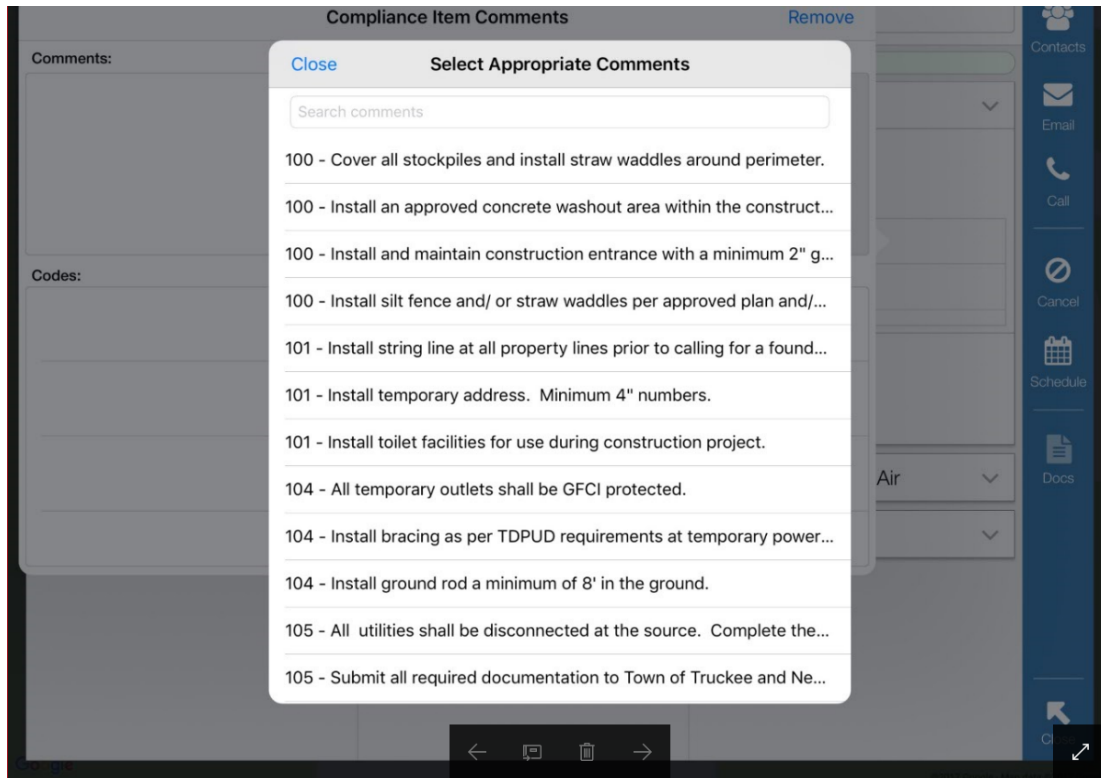
Compliance Items Comments Filter

The ability to filter and select comments quickly has been added to the Compliance Item Comments display.

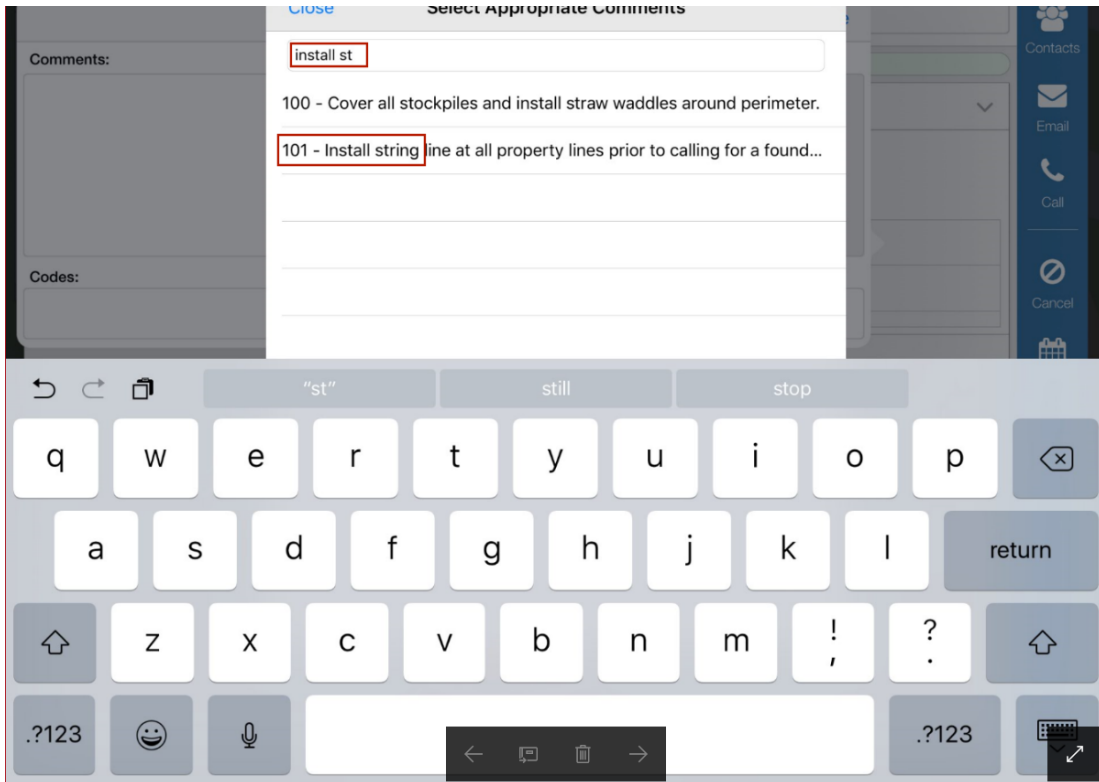
On the right side of the *Comments* area is a **Filter button**.



Click this button to open the **Select Appropriate Comments filter** containing a comprehensive list of available comments.



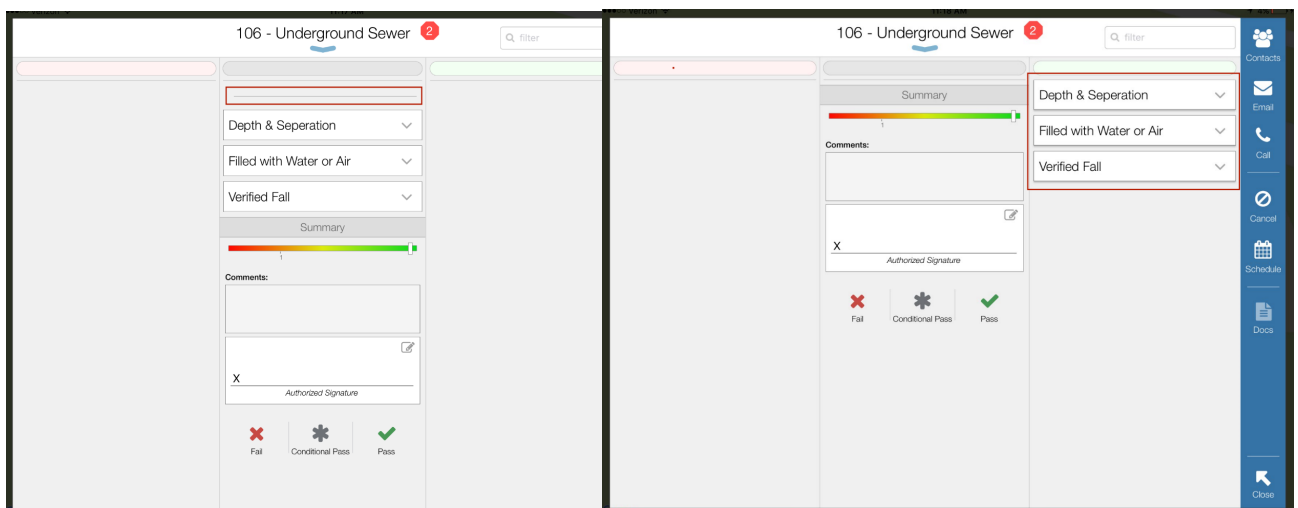
Start typing a comment in the **Search comments field**. As you type, the list refreshes to contain only the comments that most closely match what you type. When you see the comment you want, select it.



Mass Select and Move Compliance Items

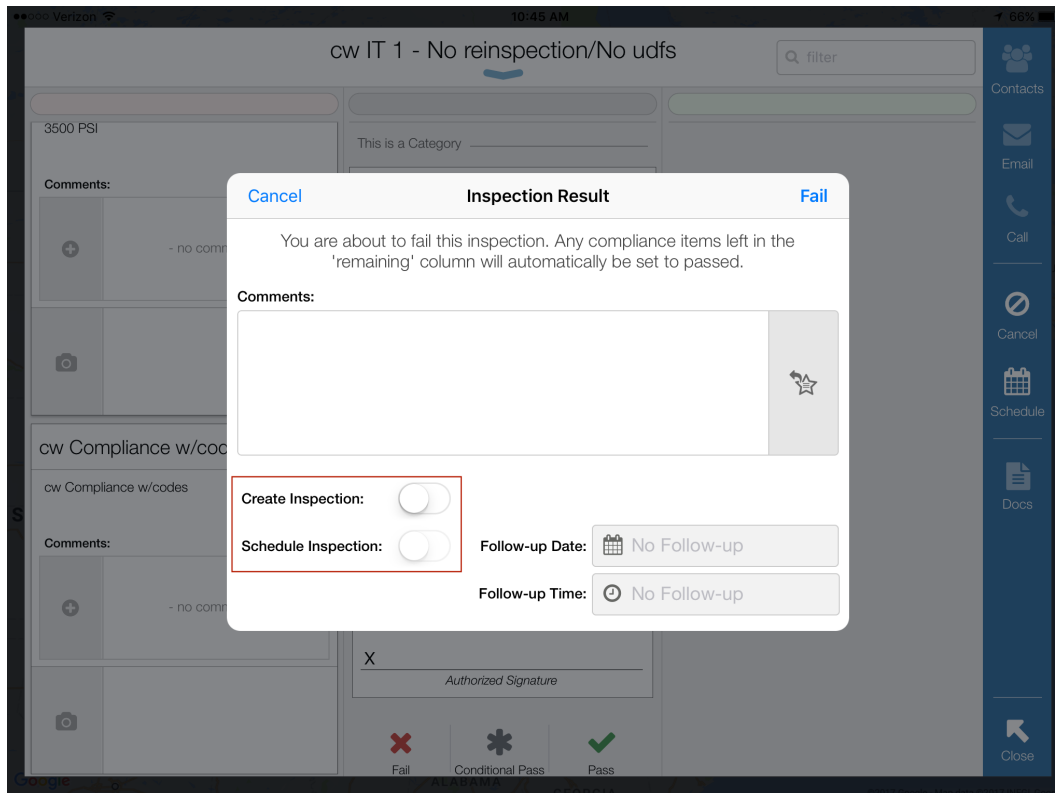
The compliance item display has been upgraded to allow all compliance items associated with an inspection to be passed or failed at once.

Select the gray line near the top of the **center panel**, and drag and drop the compliance items in the **appropriate panel**.

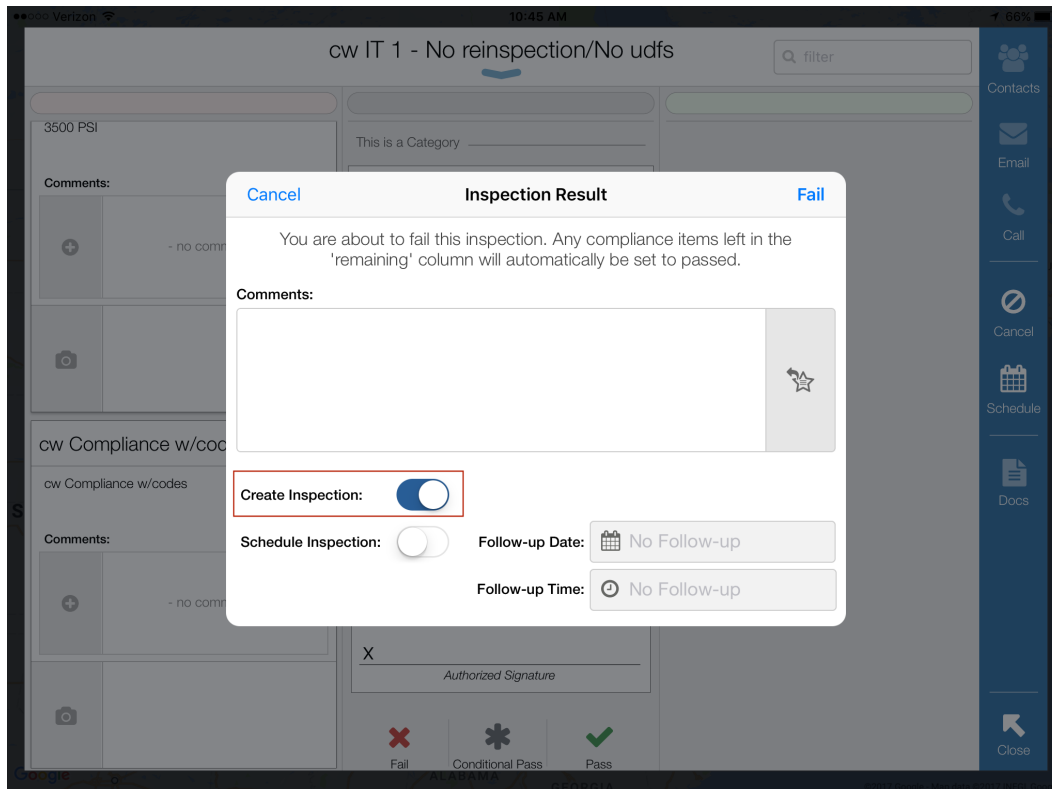


Schedule Follow-up Inspection

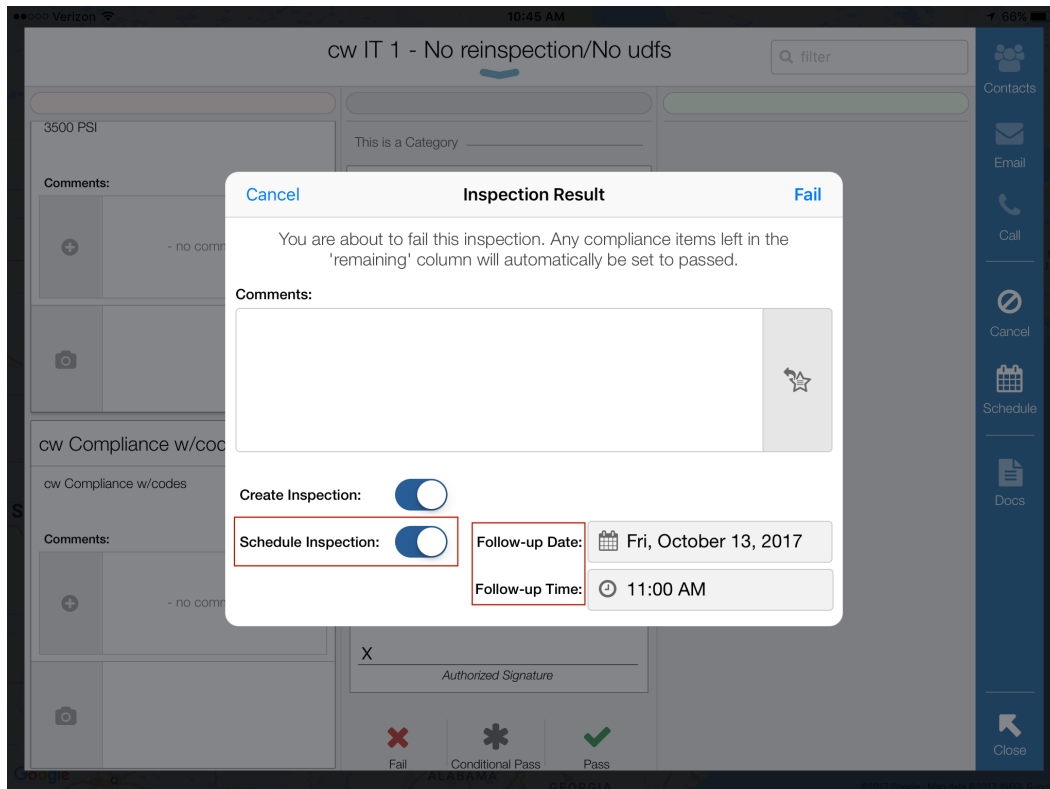
The **Inspection Result dialog** has been enhanced to provide the options to create and schedule a follow-up inspection.



To create an inspection, tap the **Create Inspection button**.



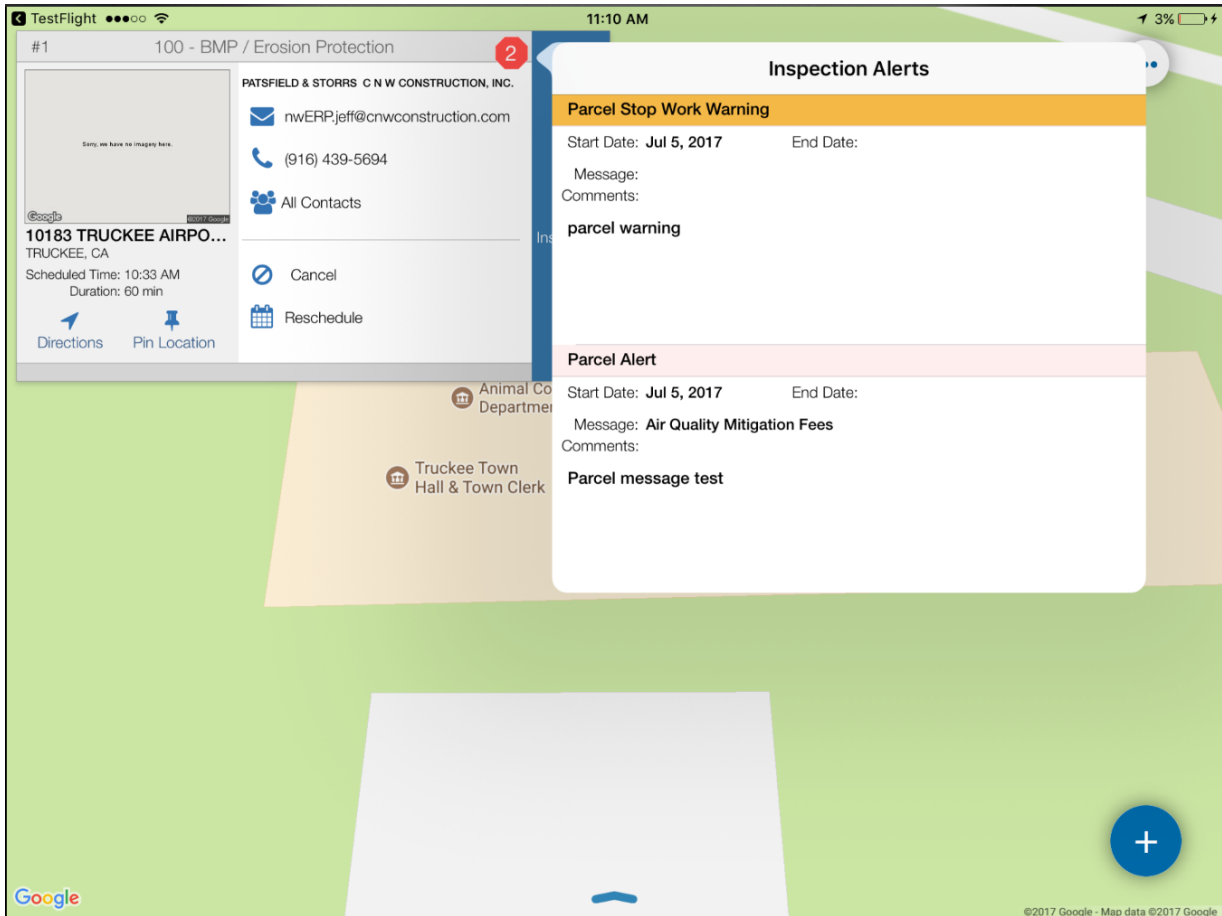
To schedule an inspection, tap the **Schedule Inspection button**.



The *Follow-up Date* and *Follow-up Time* fields will be enabled, and the inspection will be scheduled automatically for the logged-in inspector.

Stop Work Status Indicator

A stop work that has been issued to a parcel or permit appears in the **Inspection Alerts pop-up**, displaying the stop work type and severity.



As in the back office, stop work warnings are shaded in orange, stop work blocks in red.



Note: Alerts also appear on the inspection resulting display.

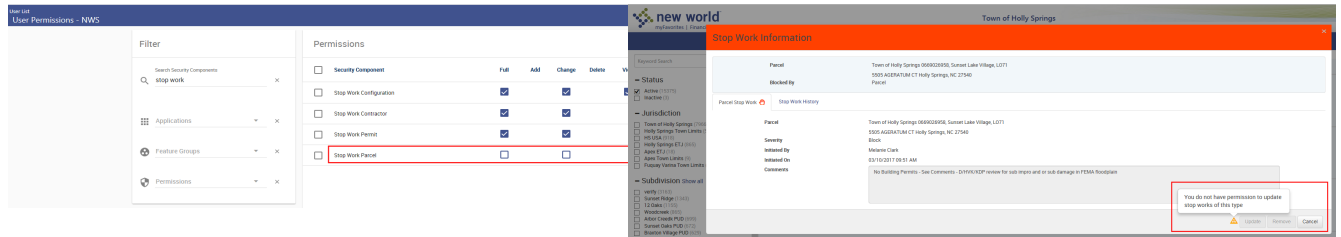
Parcel Management

Parcel Search Permissions

Community Development > Parcel Management > Parcel Search

Maintenance > new world ERP Suite > Security > Users > Permissions

If a user does not have permission to **Stop Work Parcel in User Permissions**, clicking the hand icon on a parcel search card still opens the **Stop Work Information dialog**, but the buttons to update or remove the stop work are disabled, and a tooltip displays the reason.

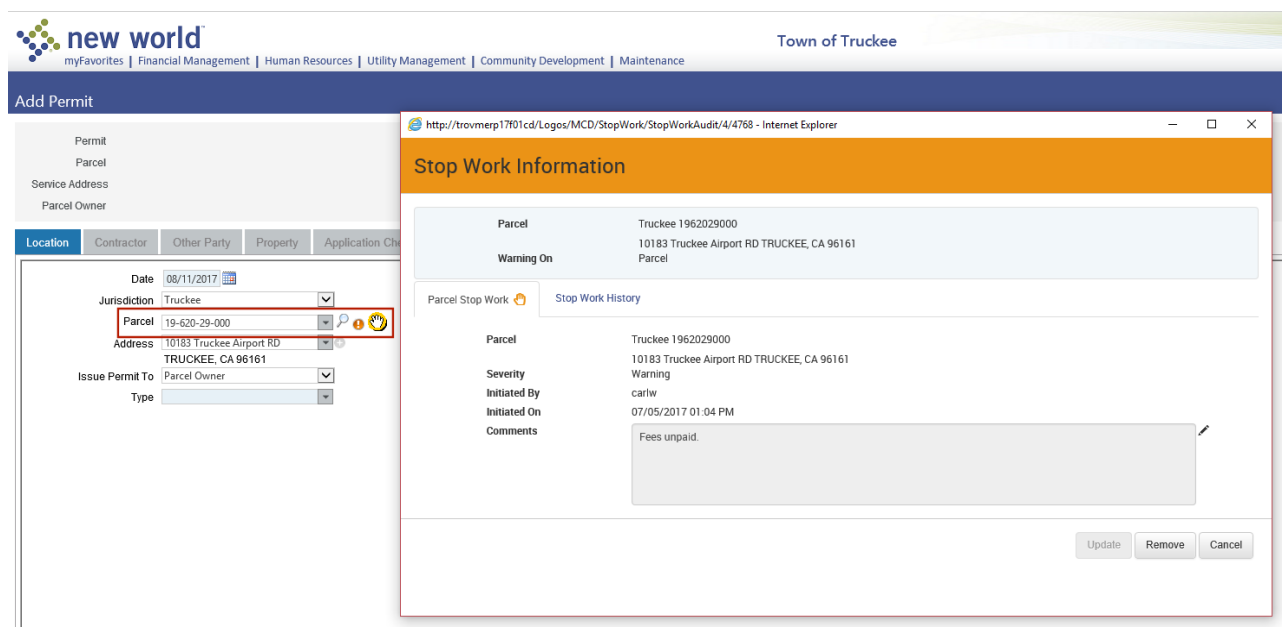


Permits

Parcel Stop Work Pop-Up

Community Development > Permits > Add Permit

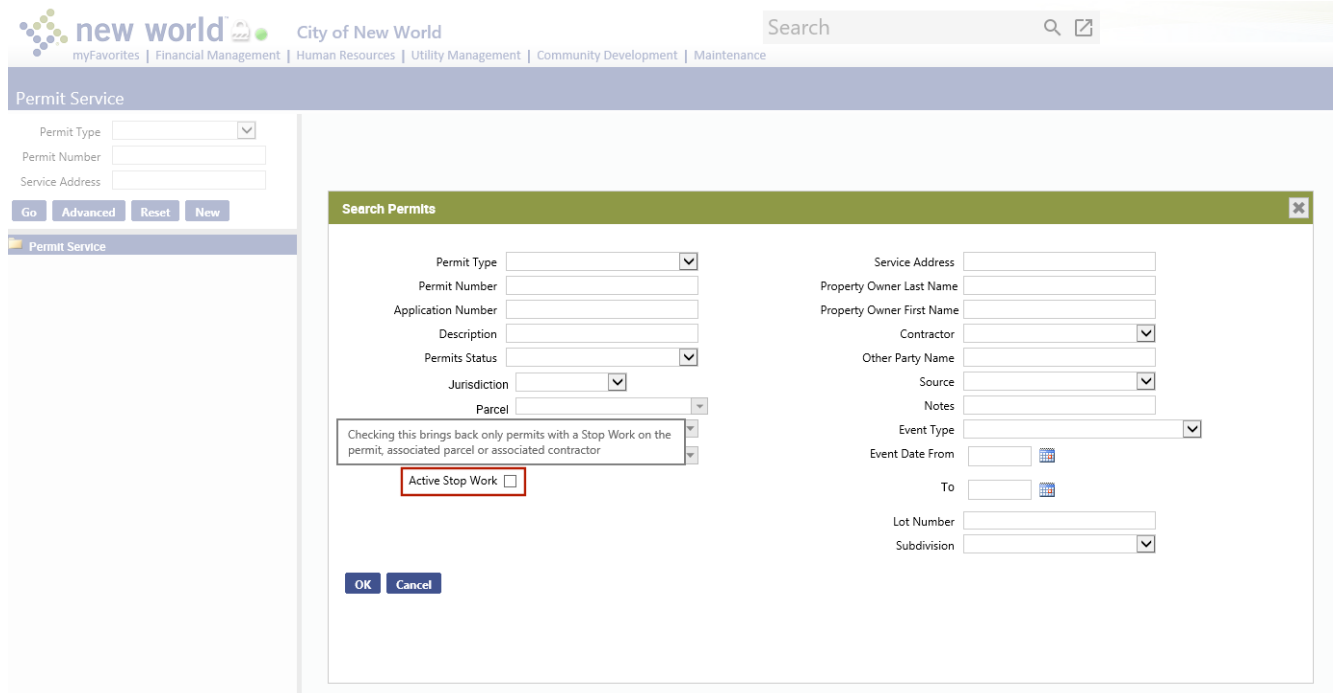
On the **Location** tab of the Add Permit process, if you select a parcel that has been issued a stop work, the **Stop Work Information pop-up** opens automatically, providing the details of the stop work.



Permit Service Active Stop Work Search

Community Development > Permits > Permit Service

An **Active Stop Work** check box has been added to the **Search Permits dialog** in Permit Service.



Select this box to have the search results include only permits with active stop works, associated parcels with active stop works and associated contractors with active stop works. Hovering over the check box displays a tooltip explaining its function.

With this enhancement, the **Stop Work Issued** and **Stop Work Removed** selections have been removed from the *Event Type* drop-down.

Stop Work

Case Parcel

[Community Development > Requests for Service > Add Case](#)

[Community Development > Requests for Service > Case Service](#)

If a parcel associated with a stop work is selected during the **Add Case** process, a stop work icon appears to the right of the *Parcel* field.

Add Case

Date	01/29/2018	Central Name	None selected
Active	☒	Cited Party	None selected
External	☒	Location Type	Parcel
Case Type	Misc - Miscellaneous Violations	Jurisdiction	Truckee - Truckee
Description	Tall grass.	Parcel	19-140-01-000
Assigned to Inspector		Location	
Priority		Generate Referral	☐
Reported By	Jerry L.	Request Inspection	☒
Phone Number		Log Inspection	☐
Alternate Phone Number		Comments	
Email			

< Back Next > New Finish Reset

This icon also appears to the right of the Parcel numbers on the [Case Service](#) and [Case](#) pages.

Case Service

Case Number		General	
Location		Case Type	Misc - Miscellaneous Violations
Service Address		Case Number	2018-00000185
Go	Advanced	Status	Active
Reset	Now	Case Opened Date	01/29/2018
Case Service		Resolution Date	
Misc - 2018-00000185		Resolution Reason	
JMA TRUCKEE 1 LLC		Open Period in Days	0
Truckee 19-140-01-000		Inspector Assigned	
		Priority	
		Principal Case	
		Case Description	Tall grass.
		Case Source	External
		Reported By	Jerry L.
		Phone Number	
		Alternate Phone Number	
		Email Address	
		Comments	
		Name	
		Cited Party Name	
		Cited Party Mailing Address	
		Property Owner Name	JMA TRUCKEE 1 LLC
		Parcel	Truckee - 191400100
		Improvement	
		Address	10002 S RIVER ST
		Master Location	TRUCKEE, CA 96161
		Primary Utility Customer	
		Utility Account	
		Location Text	
		Cross Streets	
		Mailing Address	
Citations			
Compliance Item Violations			
User-Defined Fields			


new world™
 myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Town of Truckee

Case Service

Case - Misc 2018-00000185














































Financial Management

Revenue Collection

Vertical Spacing in Check Validation

Collection Station Page

Maintenance > new world ERP Suite > Revenue Collection > Collection Stations

The new **Check Validation** section has been added to the Collection Station page. This section includes all the fields related to printing the check endorsement information on the back of a check when using a slip printer. In addition, the new **Vertical Spacing** field has been added to allow users to determine how many spaces (0-10) from the top of the check should be inserted before printing the check validation text.

Collection Station List
Collection Station - AA ◀ Prev Next ▶

Collection Station Active ☒ Name AA IP Address 1.1.1.2 Print Receipts ☒	Cash Drawer Cash Drawer Name Model Beginning Cash Balance Effective Date Start Date Amount
Printer Type Slip Printer Header Default Receipt Header Footer Print Driver Windows Multiple Printers	Email Receipts Sender's Email Address Sender's Email Message
Check Validation Alignment Right Vertical Spacing 1 Default Validate Checks ☒	
Receipt Printer Type (None) Name	
Form Validation Printer Type (None) Name	
Check Validation Printer Type (None) Name	
Special Condition Checks Electronically Deposited ☒	

Save Save/New Delete Reset Copy Effective Date Delete Effective Date

The **Vertical Spacing** field appears ONLY when 1) the **Print Receipts** check box is selected in the Collection Station section and 2) the printer **Type** field is Slip Printer. The **Vertical Spacing** drop-down contains the selectable values 0-10. The default setting is whatever default value was hard coded in your 2017.1 version of New World ERP.

The **Vertical Spacing** field, along with the related and previously existing **Validation Alignment** field and **Default Validate Checks** check box, have been grouped together for user convenience under the new Check Validation section. The **Validation Alignment** field has been renamed **Alignment**.

Revenue Collection Station Listing

The **Check Validation Vertical Spacing** value for all slip printers has been added to the Revenue Collection Station Listing. See the image below for the value's location in the report.

new world ERP							
Revenue Collection Station Listing							
Station Name	IP Address	Active	Default Validate Checks	Print Receipts	Printer Type	Printer Name	Cash Drawer Name
AAA.1 Receipt Format:	1.1.1.1	Yes Printer Model:	No	No	Local Laser Printer Driver:		Cash Drawer Model:
AAA.2 Receipt Format: Header:	1.1.1.2 Default Receipt Header	Yes Printer Model: Footer:	Yes Epson - TH-U375P	Yes	Slip Printer Printer Driver: Validation Alignment:	Right	Cash Drawer Model: Check Validation Vertical 0 Spacing
Alix Ebling Receipt Format:	100.99.97.98	Yes Printer Model:	No	Yes	Local Laser Printer Driver:	\\ipp://100.1.1.4/City Hall Annex Treasury LD050	Cash Drawer Model:

Annual Budget Processing

Budget Worksheet & Year Two Transaction Amounts

Financial Management > Reports > Annual Budget > Budget Worksheet

In 2018.1, the Budget Worksheet Report page has been enhanced with the addition of the **Include XXXX** check box, where "XXXX" is the Year Two year (relative to the current year).

Selecting this check box allows you to include Year Two transaction amounts in the report. They appear in the Transaction section of the report in the new **XXXX Totals** column.

Budget Worksheet Report Show Sample Report

Load Saved Report
Override Report Title

Distribution Group
Email Group

Budget Year
Account Type
Sort by Account Type ☒
Subtotal by Classification Level
Summarize to Organization Level
Page Break Level
Print Footer ☒
Include Comments

Print Transactions ☒
Transaction Type
Budget Level
Transaction Order
Include Accounts With Zero Balances ☐
Print Full G/L Account Number ☐
Report Output Type

Include 2019 ☒

Organizations

Accounts

Balances to Include

Fund

Department

Project/Grant

Location

Function

Sub Function

Available Organization(s): 459

001 - General Fund
001-0000-0028 - General Fund, No Department, Remembra
001-0000-0049 - General Fund, No Department, Motorcycle
001-0000-0060 - General Fund, No Department, New Vetera
001-0000-0064 - General Fund, No Department, Restitution
001-0000-0068 - General Fund, No Department, Skate Park
001-0000-0071 - General Fund, No Department, Restitution
001-0000-0082 - General Fund, No Department, Field Day-P
001-0000-0097 - General Fund, No Department, Mayor Trav
001-0000-0101 - General Fund, No Department, CDBG Adm
001-0000-0102 - General Fund, No Department, Section 8 A
001-0000-0103 - General Fund, No Department, 2015 RNNC

Selected Organization(s): 0

Print

Reset

Save

Save As

Delete

This option is only available when using biennial budgeting, i.e., when the **Biennial Budgeting** check box is selected in Maintenance (**Maintenance > Financial Management > Company FM Settings > Annual Budget Settings tab**).

Company FM Settings

Budget Validation ▾	Annual Budget Settings ▾	Annual Budget Levels ▾	Procurement ▾	Accounts Payable ▾	Miscellaneous ▾
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Budget Defaults

Maintain Prior Year Estimated Expenses and Revenues ☒

Calculate Current Year Balance Method Value at a Certain Date ▾

Use Actual Balance through End Of January ▾

Calculate Current Year Extrapolate Balance Method Extrapolate Value over Full Year ▾

Default Budget Method Last Year's Adopted * % Change ▾

Current Budget Year 2018 Year 1 ☒ Year 2 ☐

Include Encumbrances in Actual Balances ☒

Biennial Budgeting ☒

Concept Column Value Display Current Level Concept Amounts from Prior Year ▾

Forecasting Defaults

Number of Forecast Years 6 This value includes Biennial Year 2.

Forecast Initialization Method Initialize with Zero-Based ▾

Save
Reset
Print

ePay

ePay Management and Unprocessed Receipt Transactions

In New World ERP 2017.1, several enhancements have been made to ePay functionality. To begin, the **ePay Provider** and **ePay Monitor** pages have been added. The ePay Provider page contains all of the fields and functionality that in earlier releases are found in the **ePay Settings** page. The functionality remains the same; only the page name has been changed.

The [ePay Settings page](#) now contains a completely new set of controls that allow users to configure how their system will handle unprocessed receipt transactions, i.e., credit card transactions that process successfully on the processor's side (e.g., BridgePay, OpenEdge, Authorize.NET, etc.) but fail to initially generate a receipt on the new world ERP side.

The [ePay Monitor page](#) displays all transactions that are in process. From this page, you can research the cause of a transaction's failure and, once the problem has been resolved, manually resubmit the transaction for receipt generation.

The sections below describe how to access ePay Management functionality and how to best utilize the new features. Please see the following:

[Accessing ePay Functionality](#)

[Resolving Unprocessed Receipt Transactions](#)

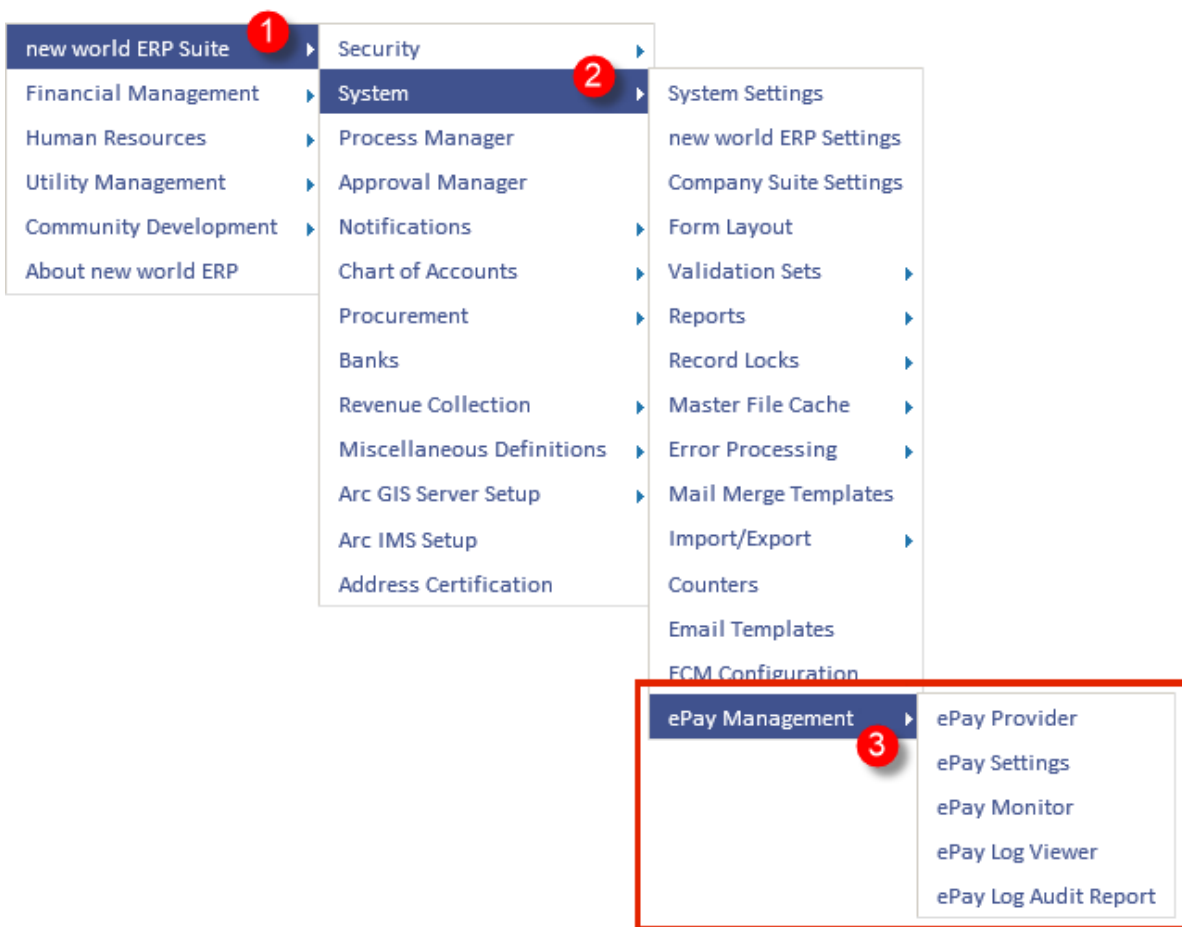
[ePay Settings Page](#)

[ePay Monitor Page](#)

Accessing ePay Functionality

Maintenance > new world ERP Suite > System > ePay Management

For organizational and ease-of-access purposes, links to all ePay related pages have been collected under the new **ePay Management** option on the System drop-down menu:



Resolving Unprocessed Receipt Transactions

Overview

On rare occasions, a credit card transaction that is successfully processed on the processor's side (e.g., BridgePay, OpenEdge, Authorize.NET, etc.) will fail to generate a receipt on the new world ERP side, leaving the New World ERP user unsure about the status of the transaction. When this happens, the transaction is considered an unprocessed receipt transaction. Typically, the reason these receipt transactions fail to process has to do with the Revenue Collection receipt service going down.

In 2018.1, functionality has been added to help users manage unprocessed receipt transactions. Through **ePay Settings**, administrators can now configure the system to automatically resubmit a failed transaction for receipt generation. They can set the number of automatic retry attempts the system will make for unprocessed receipt transactions, as well as the interval in minutes between retry attempts. See [The ePay Settings Page](#) below.

If the user-defined number of retry attempts has been exhausted for a given transaction and a receipt has still not been generated for the transaction, administrators will be able to track the issue via the new **ePay Monitor** page. This page provides access to the details of each unprocessed receipt transaction. After viewing transaction information, administrators, when applicable, can take the appropriate action to correct any issues that might be preventing receipt creation. The administrator can then manually resubmit the transaction for receipt generation via a button in the ePay Monitor grid. See [The ePay Monitor Page](#) below.

The ePay Settings Page

As stated above, the ePay Settings page has been enhanced with a completely new set of entry fields. Controls in this page allow administrators to determine how the system will address unprocessed receipt transactions. See the field descriptions below.

ePay Settings

Days to Maintain Logs

Retry Count

Retry Duration in Minutes

Send Email Notification To

Save
Reset

Elements of the ePay Settings Page

Element Name	Description
<i>Days to Maintain Logs</i>	The ePay Log Viewer displays a record of every ePay transaction. Since it is probably unnecessary to maintain these logging transactions indefinitely, the <i>Days to Maintain Logs</i> field allows you to determine how many days transactions will be stored on your system and displayed in the ePay Log Viewer. If you would like to limit the number of days logging transactions are stored on your system, enter the number of days in the <i>Days to Maintain Logs</i> field. If, for example, you would like transactions to be stored on your system for 30 days, then you would enter 30 in this field. Going forward, each transaction will be purged from the system exactly 30 days after its creation (i.e., 30 days from the day the receipt service was started for the transaction). If this field is left blank, transactions will never be purged; they will be stored on your system indefinitely.
<i>Retry Count</i> and <i>Retry Duration in Minutes</i>	The <i>Retry Count</i> and <i>Retry Duration in Minutes</i> fields work together. When a credit card payment transaction fails to generate a receipt, the <i>Retry Count</i> field allows you to determine how many times the system should automatically resubmit the transaction to the receipt

Elements of the ePay Settings Page

Element Name	Description
	service. The <i>Retry Duration in Minutes</i> field allows you to determine the interval in minutes between retry attempts. For example, if a transaction fails to generate a receipt via the receipt service and you have a 3 in the <i>Retry Count</i> field and a 5 in the <i>Retry Duration in Minutes</i> field, then the system will automatically retry to generate a receipt after the initial failure. It will do this up to 3 times in 5 minute intervals. If the receipt is still not generated after the designated number of retries (<i>Retry Count</i>), the transaction will display in the ePay Monitor where the administrator can try to manually push it through to receipt generation. See The ePay Monitor Page below.
<i>Send Email Notification To</i>	When a credit card payment fails to generate a receipt, and the user-defined number of retry attempts has been exhausted to no avail, the transaction will be sent to the ePay Monitor and an email message will be automatically sent to a designated recipient to inform them of the situation. Use the <i>Send Email Notification To</i> field to indicate the email address associated with the individual to whom notification about failed transactions should be sent.  Note: The actual email message that is sent to the designated recipient is defined via the Email Template Setup page in Maintenance (Maintenance > New World ERP Suite > Email Templates, and then search on Financial Management > ePay > Monitor Alert). A generic email message comes predefined and ready to use. However, you can modify the body of the message or rewrite it

Element Name	Description
	completely, should you wish to do so. On the Email Template Setup page, you can also define the <i>From Address</i> and email message <i>Subject Line</i>.

The purpose of the ePay Monitor page is to list all currently unprocessed receipt transactions and to provide access to detailed information about transaction history so that users can deduce the cause of a given transaction's failure. Once the cause of failure has been resolved, users can resubmit transactions for receipt generation via a button on this page.

Please see below for details.

Each unprocessed receipt transaction appears as a line item in the ePay Monitor grid. The following information is provided for each transaction: *Invoice Number* (ePay logging number), *User Name*, *Status*, *Receipt Message*, *Retry Count*, *Created Date*, *Amount*, *Failed Reason*, and *Last Retry Date*.

Hovering over a transaction's *Receipt Message* displays the entire receipt message. Also, values in the *Invoice Number* column are hyperlinks. Clicking the *Invoice Number* associated with a transaction opens the ePay Log Viewer and associated transaction information. Users can drill into a transaction and view detailed information about associated events, including all related processes and process results.

Users can use this information to resolve the issue(s) that prevented receipt generation. They can then return to the grid in the ePay Monitor page and click the transaction's associated **Resubmit** button to resubmit the transaction for receipt generation. The **Resubmit** button is located at the end of each transaction row in an unlabeled column. When clicked, the transaction is submitted for receipt generation.

The **Resubmit** button is only available when a transaction is in Error, Exceed, or Failure status. If a transaction is in **Processing** or **Submitted** status, the **Resubmit** button does not display.

As an example of the process, let's say that the Revenue Collection receipt service went down, and while it was down, transactions were processed as usual. Once it is discovered that the service is down, the service is restarted. All the receipts that were not created due to the receipt service being down would be collected in the ePay Monitor page. A user could then select the transactions one-by-one, clicking the **Resubmit** button associated with each transaction, one after the other.



Note: When RabbitMQ is up but the receipt service is down, transactions will collect in the ePay Monitor. When the receipt service is back up, the transactions will be automatically resubmitted. If both RabbitMQ and the receipt service go down, call new world ERP Support.

Special Assessments

Special Assessments Enhancements

The "External" Nature of District Type and Installment Schedules

In Prep Roll District Entry, a new billing method has been created to allow users to define the exact billing amount for all payment installments instead of having the system calculate the installment amounts automatically.

To provide and support this functionality, several enhancements have been made including the following:

- » **Prep Roll Districts.** On the **General** tab In Prep Roll District entry, the External option has been added to the *Nature of District* drop-down list. When selected, the new *Installment Schedule* grid displays in the **Parcel Entry** tab, allowing users to set up the installment schedule, i.e., define installment amounts, etc. For more information, see [The "External" Nature of District Type and Installment Schedules](#) below.
- » **Copying Districts.** When copying an external district, users will have the option of including the installment schedule in the copy process. For more information, see [Copying an External District](#) below.
- » **Billing.** Users can now create bills based on user-defined installment schedule information, i.e., the principal and interest amounts a user manually enters in an installment schedule during Prep Roll District Entry. For more information, see [Creating Bills for External Districts](#) below.
- » **Revenue Collections.** When a parcel payment is made for a district that has a Nature of District of "**Payment for Use**," the payment will not be considered complete if there are associated installments that must still be billed. A payment will only be considered complete when the current *Billed Balance*, *Unbilled Balance*, *Payoff Balance*, and *Installments to Bill* are all zero.
- » **Adjustments.** Users can add a parcel to an external district via Special Assessments Adjustments. See [Adding a Parcel to an External District](#) below.
- » **Active Roll Districts.** Users can view external districts and installment schedules in Active Roll Districts pages. See [Active Roll Districts](#) below.
- » **District/Parcel Inquiry.** The **Transactions** section now includes all payment allocations to all relevant fees, penalties, etc. The *As of Date* in the General section determines which payment allocations appear in this section. Only transactions dated on or before the *As of Date* will appear in the Transactions grid. This date can be modified as needed.
- » **Account Inquiry Page.** The Installment Schedule section has been added to the Special Assessments Account Inquiry pop-up page. See [Installment Schedule Added to Account Inquiry Page](#) below.
- » **Prep Roll District Edit Listing.** Users will be able to view *Installment Schedule* information on the Prep Roll District Edit Listing for each parcel (for external districts only).
- » **Adjustments Edit Listing.** Users will be able to view *Installment Schedule* information on the Adjustments Edit Listing for adjustments to Add a Parcel to a Dynamic/External District.

» **Mail Merge Form Letters.** The mail merge form letter will include external district information.

Prep Roll District Entry

The New “External” *Nature of District* Option

On the **General** tab of the Prep Roll District Entry page, the new **External** option has been added to the *Nature of the District* drop-down list. Using the External option allows users to manually define the exact billing amount for all payment installments, instead of letting the system calculate the installment amounts automatically as it does for other *Nature of District* types.

General	G/L Distribution Profile	Assessment Per Unit/Measure	Parcel List	District Summary
General Information				
Department1400 - Finance JurisdictionJ1 - Jurisdiction 1 District TypeDist Type Test - SAN test description Nature of the DistrictExternal District CodeDRF-99 Assessment Start Date05/09/2017 First Bill Due Date05/19/2017 Billing FrequencyMonthly Billing CycleMonthly Total Number of Installments3 Assessment Per Unit/Measure				

When **External** is selected as the *Nature of District*, all of the fields in the *Interest Information* and *Payment Information* sections are disabled, as are the following check boxes and fields in the *Billing Information* section: *Assessment Per Unit/Measure*, *Default Assessment Amount per Parcel*, *Grace Period*, *Grace Period End Date*, *Partial Payment During Grace Period*, *Accrue Interest During Grace Period*, and *Interest Start Date*.

When an external district is successfully saved, an *Installment Schedule* is created and added to the **Parcel Entry** tab (see below).

The installment schedule will contain one row for every installment payment. The number of installment payments, and thus the number of rows in the schedule, are determined by the value entered in the *Total Number of Installments* field in the **General** tab. For example, if a user entered "3" in the *Total Number of Installments* field in the Prep Roll District Entry page's **General** tab, then three rows will appear in the *Installment Schedule* grid in the **Parcel Entry** tab.

The user can then manually enter the *Principal Due* and *Interest Due* for each payment installment in the *Installment Schedule*. This is done by clicking in the *Principal Due* table cell for a given *Installment Number* and entering the appropriate amount, doing the same in the *Interest Due* cell, and then repeating these steps for each remaining installment payment.

Parcel Entry

028-A/05 /020

Property Information

District Code: DRF-99
Nature of the District: External
Jurisdiction: J1 - Jurisdiction 1
Parcel: 028-A/05 /020
Parcel Legal Description:
Owner's Name: BRANSTETTER BOB & CORNELL TOM
Parcel Address: 603 PARK HILLS ST
Troy, MI 48084
Billing Address: PO BOX 2638
Troy, Michigan 48084
Active: ☒
Inactive Reason:

Billing Information

Assessment Start Date: 05/09/2017
First Bill Due Date: 05/19/2017
Billing Frequency: Monthly
Billing Cycle: Monthly
Total Number of Installments: 3
Assessment Amount: \$80.00
Grace Period: 0 days
Grace Period End Date: 05/09/2017
Partial Payment During Grace Period: ☐
Accrue Interest During Grace Period: ☐
Interest Start Date: 05/09/2017
Exempt Delinquent Charges: ☐

Interest Information

Interest Type:
Installment Billing Amount:
Annual Interest Rate: 0
Delinquent Interest Rate:
Calculation Frequency:
Calculation Time:

Installment Schedule

Installment Number	Principal Due	Interest Due	Installment Date
1	\$20.00	\$2.00	05/19/2017
2	\$20.00	\$2.00	06/19/2017
3	\$40.00	\$4.00	07/19/2017

1 - 3 of 3 records
Show 25 records

Total \$80.00 \$8.00

The *Total* fields below the grid display the *Principal Due* total and *Interest Due* total respectively.

The first installment will have an *Installment Date* equal to the *First Bill Due Date* (as defined in the **General** tab). Every installment after the first installment will be dated based on the user-defined *Billing Frequency*.

The *Assessment Amount* field displays in the **Parcel Entry** tab for external districts only. When a new parcel is added, this field's default value is \$0.00. As the installment schedule is defined, however, the *Assessment Amount* updates to always equal the sum total of the *Principal Due* as defined in the Installment Schedule. If no data has been entered in the installment schedule section, then this field will remain \$0.00.

After the user has entered all the necessary information in **Parcel Entry**, clicking **Save** will initiate a check for errors. If errors are detected, informative error messages will display. If no errors are detected, the installment schedule will be saved.



Note: The *Per Unit/Measure Rates* section does not display in the **Parcel Entry** tab for External districts.



Note: When an external district is **validated**, an error will display if any parcel in the district has an *Assessment Amount* that is less than or equal to \$0.00.



Note: When an external district is **posted**, the G/L entries are made to the relevant deferred revenue and receivable accounts.

Calculations for External Districts

The following amounts, which are provided on the Special Assessments Account Inquiry page (and elsewhere), are calculated based on the user-defined *As of Date*:

- » *Unbilled Principal Balance* = Total Principal Amount (per Installment Schedule) – Billed Principal Amount – Any payment made to Unbilled Principal.
- » *Unbilled Interest* = Total Interest Amount (per Installment Schedule) – Billed Interest Amount – Any payment made to Unbilled interest
- » *Billed Principal Balance* = Total Billed Principal Amount – Paid Principal Amount
- » *Billed Interest Balance* = Total Billed Interest Amount – Paid Interest Amount
- » *Delinquent Interest* = \$0.00
- » *Payoff Balance* = Unbilled Principal Balance + Unbilled Interest Balance + Account Fees + Billed Principal Balance + Billed Interest Balance + Billed Penalty Balance

Making Changes After an External District's Installment Schedule Has Been Created

- » If the following fields are changed *after* the installment schedule has been created, the installment schedule will be deleted and will have to be recreated based on the new value(s): *Assessment Start Date*, *First Bill Due Date*, *Billing Frequency*, and/or *Total Number of Installments*.

When a change to any one of these fields is attempted, however, a message will appear informing the user that should they proceed with the change the installment schedule will be deleted. At this point, the user has the option of canceling the change by clicking **Cancel** or the  button in the message window.

- » To change the installment dates, the user must change the *First Bill Due Date* in the **General** tab. When this value is updated, a message will display informing the user that changing the *First Bill Due Date* will delete all the values previously entered in the installment schedule, which must then be recreated.
- » If the *Assessment Start Date* for an external district is changed after the installment schedule is created, the schedule will be deleted and the user will have to recreate it.

Copying an External District

When copying an external district, the *Assessment Per Unit/Measure* check box will be cleared and disabled.

Also, the *Installment Schedule* check box will display, allowing the user to choose whether or not to copy the installment schedule values from the original district to the newly created district. The *Installment Schedule* check box is enabled for external districts only, and then only when the *Parcels* check box is selected on the Copy District pop-up page.

Copy Special Assessments District

Copy from District
DRF-99

District Code

Description

Assessment Start Date

First Bill Due Date

Include Information on

G/L Distribution page
☐

Assessment Per Unit/Measure page
☐

User Defined Fields page
☐

Notes and Documents
☐

Parcels
☒

Installment Schedule
☒

Create
Create/Maintain
Cancel

If the *Installment Schedule* check box is selected when the **Create** or **Create/Maintain** button is clicked, installment information from the original district will be copied to the newly created district. If the *Installment Schedule* check box is cleared when the **Create** or **Create/Maintain** button is clicked, installment information from the original district will not be copied to the newly created district, and the installment schedule will be zeroed out.

Billing

Creating Bills for External Districts

Financial management > Special Assessments > Billing > Find > Define Billing Month, Year, and Payment Installments > Select a district > Create

Users can now create bills based on user-defined installment schedule information, that is, based on the principal and interest amounts a user manually entered in an installment schedule during Prep Roll District Entry.

In Special Assessment Billing, when the **Create** button is selected during the bill creation process for an external district, a new billing batch will be created based on the principal and interest amounts defined by the user in the installment schedule for the installment being billed.

Amounts for *Principal*, *Interest*, *Total Delinquent Balance*, and *Total Payoff Amount* are displayed on the Special Assessment Billing Edit List page, inquiry receipt, and all applicable reports:

- » *Principal*: Populated based on the principal amount entered by the user on the parcel for the specific billing installment.
- » *Interest*: Populated based on the interest amount entered by the user on the parcel for the specific billing installment.
- » *Total Delinquent Balance*: Billed Principal Balance + Billed Interest Balance + Billed Delinquent Fee + Account Fee.
- » *Total Payoff Amount*: Unbilled Principal Balance + Unbilled Interest Balance + Account Fees + Billed Principal Balance + Billed Interest Balance + Billed Penalty Balance.

There is no change in the way other amounts are calculated.

Adjustments

Adding a Parcel to an External District

Financial Management > Special Assessments > Adjustments

A new adjustment method has been added. The method **Add a Parcel to a Dynamic District** has been modified to allow users to add a parcel to an external district, as well as a dynamic district. This method has been renamed **Add a Parcel to a Dynamic/External District**.

This adjustment method includes the ability to define an installment schedule for the external district (see below for details).

Functionality to add dynamic districts remains the same as in previous releases.

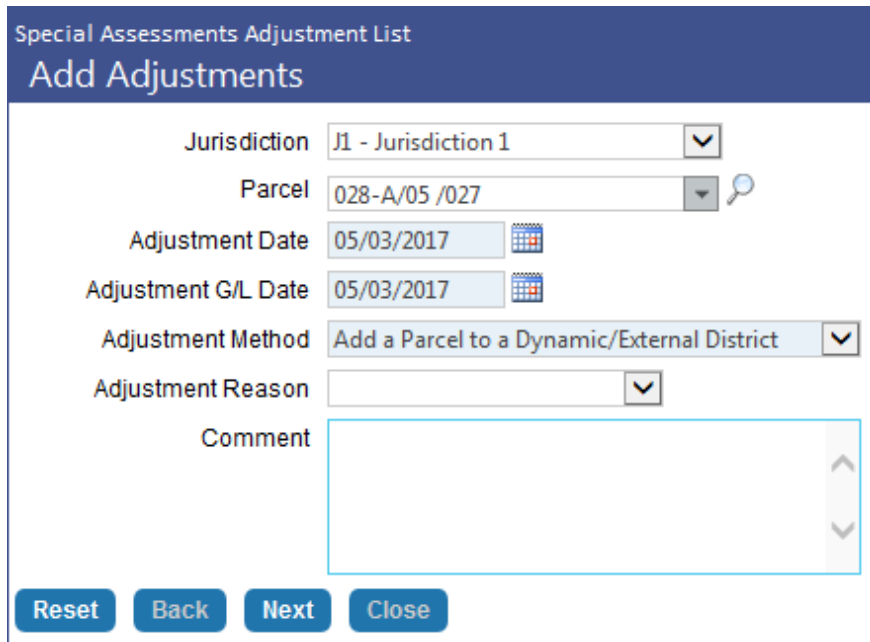
Installment Schedule information is now also included on the Adjustments Edit Listing for adjustments to Add a Parcel to a Dynamic/External District.

Step-by-Step: Adjustment to Add a Parcel to a Dynamic/External District

1. Open the Adjustment List page (**Financial Management > Special Assessments > Adjustments**) and click the **New**  button at the bottom of the page.
2. The Add Adjustments screen #1 will display. Enter the required information, i.e., the appropriate *Jurisdiction*, *Parcel*, *Adjustment Date*, and *Adjustment G/L Date*.

Then click the *Adjustment Method* field and select the new **Add a Parcel to a Dynamic/External District** option from the drop-down list.

After all the necessary information is entered, click **Next**.



Special Assessments Adjustment List
Add Adjustments

Jurisdiction

Parcel

Adjustment Date

Adjustment G/L Date

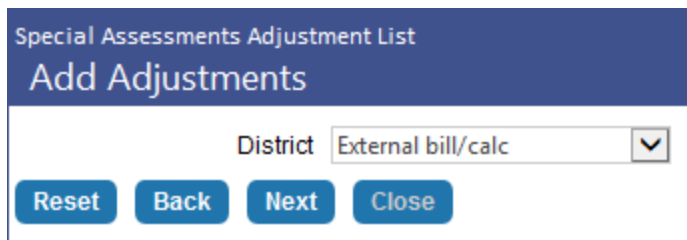
Adjustment Method

Adjustment Reason

Comment

3. The Add Adjustments screen #2 will display. The *District* drop-down list will be filtered to include only dynamic and external active roll districts.

Select the appropriate external district from the drop-down list and then click **Next**.



Special Assessments Adjustment List
Add Adjustments

District

- The Add a Parcel page will display. Notice that the Payment Installments grid has been added below the entry fields. This grid, which displays for external districts only, allows you to define the principal and interest due for each payment installment associated with the parcel-district.



Note: The Assessment Per Unit/Measure grid does not display for external districts.

Special Assessments Adjustment List
Add a Parcel

Parcel: 028-A/05 /027

Parcel Legal Description:

Owner's Name: BROOKS STEVEN J,

Parcel Address: 558 PARK HILLS ST
Troy, MI 48084

Assessment Start Date: 01/01/2017

First Bill Due Date: 01/31/2017

Assessment Amount:

Installment Number	Principal Due	Interest Due	Installment Date
1	\$0.00	\$0.00	01/31/2017
2	\$0.00	\$0.00	02/28/2017
3	\$0.00	\$0.00	03/28/2017
4	\$0.00	\$0.00	04/28/2017
5	\$0.00	\$0.00	05/28/2017
6	\$0.00	\$0.00	06/28/2017
7	\$0.00	\$0.00	07/28/2017
8	\$0.00	\$0.00	08/28/2017
9	\$0.00	\$0.00	09/28/2017

1 - 12 of 12 records

prev 1 next

Show 25 records

Back Finish

The cells in the *Principal Due* and *Interest Due* columns are editable, so you can define the *Principal Due* and *Interest Due* for each installment payment by typing the amount directly in the respective grid cells.

Installment Number	Principal Due	Interest Due	Installment Date
1	10	\$0.00	01/31/2017
2	\$0.00	\$0.00	02/28/2017
3	\$0.00	\$0.00	03/28/2017
4	\$0.00	\$0.00	04/28/2017
5	\$0.00	\$0.00	05/28/2017
6	\$0.00	\$0.00	06/28/2017
7	\$0.00	\$0.00	07/28/2017
8	\$0.00	\$0.00	08/28/2017
9	\$0.00	\$0.00	09/28/2017

1 - 12 of 12 records prev 1 next Show 25 records

Notice, too, that the amount in the *Assessment Amount* field automatically updates to reflect the sum total of the *Principal Due*. The *Assessment Amount* field updates as you enter, modify, or remove individual installment principal due amounts.

Assessment Amount	\$90.00
-------------------	---------

Installment Number	Principal Due	Interest Due	Installment Date
1	\$10.00	\$0.50	01/31/2017
2	\$10.00	\$0.50	02/28/2017
3	\$10.00	\$0.50	03/28/2017
4	\$10.00	\$0.50	04/28/2017
5	\$10.00	\$0.50	05/28/2017
6	\$10.00	\$0.50	06/28/2017
7	\$10.00	\$0.50	07/28/2017
8	\$10.00	\$0.50	08/28/2017
9	\$10.00	\$0.50	09/28/2017

1 - 12 of 12 records prev 1 next Show 25 records

- After you have defined all of the fields in the Add a Parcel page, and filled in the payment installment schedule grid, click **Finish** to save the new information to the parcel.

Active Roll Districts

Users can view external districts and installment schedules in Active Roll Districts pages.

District/Parcel Inquiry

Financial Management > Inquiries > Special Assessments > Districts/Parcels

The **Transactions** section lists all transactions associated with a selected district/parcel. The transactions now include all payment allocations to all relevant fees, penalties, etc. The *As of Date* in the General section determines which transactions and payment allocations appear

in this section. Only transactions dated on or before the *As of Date* will appear in the Transactions grid. This date can be modified as needed.

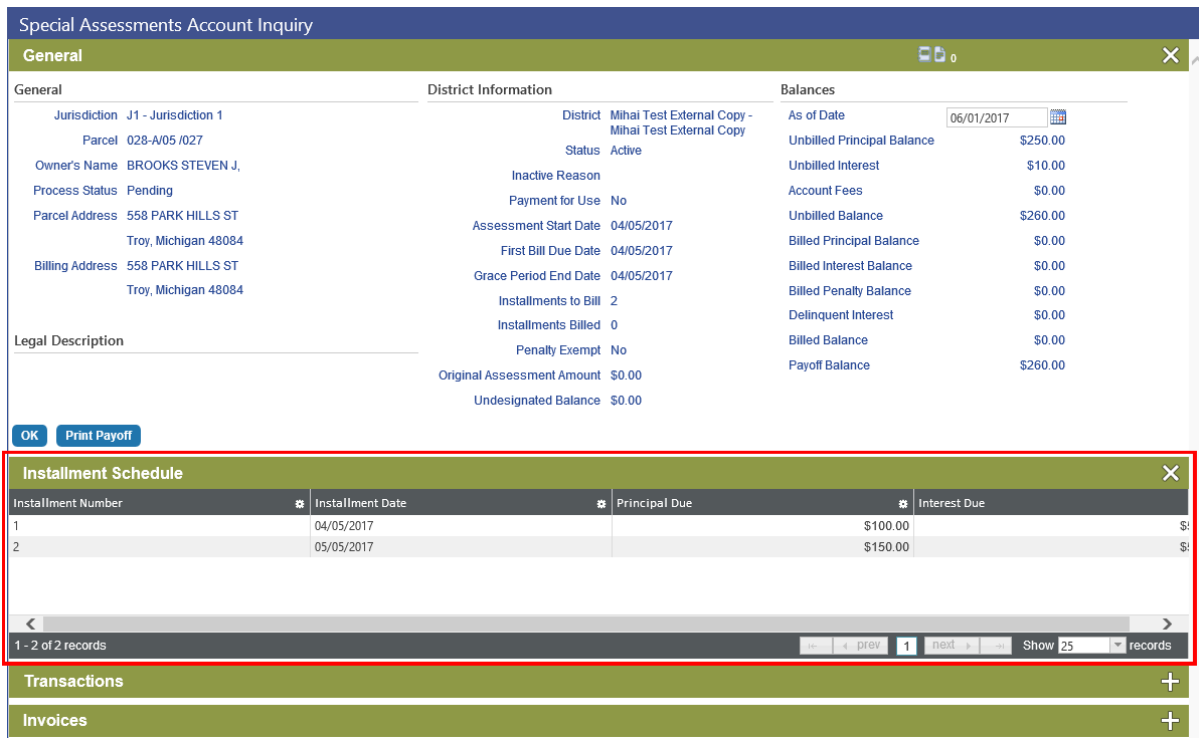
Installment Schedule Added to the Account Inquiry Page

Financial Management > Inquiries > Special Assessments > Districts/Parcels > Parcel List > Select a parcel

For external districts only, the Special Assessments Account Inquiry pop-up page has been enhanced with the addition of the Installment Schedule section (see below). If installments have been set up for the selected parcel-district, all of the installments will be listed in this section by Installment Number. For each installment, the following information is provided: *Installment Date*, *Principal Due*, and *Interest Due*.

In the General section, the unbilled interest and unbilled principal amounts are updated based on the installment schedule.

Again, the Installment Schedule section only displays for external districts. Like the other sections in the Account Inquiry pop-up page, the Installment Schedule section may be expanded or collapsed as needed.



Special Assessments Account Inquiry

General

General	District Information	Balances
Jurisdiction J1 - Jurisdiction 1	District Mihai Test External Copy - Mihai Test External Copy	As of Date 06/01/2017
Parcel 028-A/05 /027	Status Active	Unbilled Principal Balance \$250.00
Owner's Name BROOKS STEVEN J.	Inactive Reason	Unbilled Interest \$10.00
Process Status Pending	Payment for Use No	Account Fees \$0.00
Parcel Address 558 PARK HILLS ST Troy, Michigan 48084	Assessment Start Date 04/05/2017	Unbilled Balance \$260.00
Billing Address 558 PARK HILLS ST Troy, Michigan 48084	First Bill Due Date 04/05/2017	Billed Principal Balance \$0.00
	Grace Period End Date 04/05/2017	Billed Interest Balance \$0.00
	Installments to Bill 2	Billed Penalty Balance \$0.00
	Installments Billed 0	Delinquent Interest \$0.00
Legal Description	Penalty Exempt No	Billed Balance \$0.00
	Original Assessment Amount \$0.00	Payoff Balance \$260.00
	Undesignated Balance \$0.00	

OK Print Payoff

Installment Schedule

Installment Number	Installment Date	Principal Due	Interest Due
1	04/05/2017	\$100.00	\$10.00
2	05/05/2017	\$150.00	\$10.00

1 - 2 of 2 records

Transactions +

Invoices +

Special Assessments and Revenue Collections

Payment for Use

When a parcel payment is made for a district that has a Nature of District of "**Payment for Use**," the payment will not be considered complete if there are associated installments that must still be billed.

A payment will only be considered complete when the current *Billed Balance*, *Unbilled Balance*, *Payoff Balance*, and *Installments to Bill* are all zero.

Year End

Support for Corrected and Omitted Vendor 1099 Forms

Overview

The IRS used to allow a two-month leeway after the 1099 form due date in order to give payers time to verify the information people were filing and make any necessary corrections before sending the file to the IRS. Tyler Technologies encouraged New World ERP users to take advantage of that two-month window to avoid having to work through the IRS to make corrections.

However, due to the large amount of fraudulent activity surrounding the filing of returns, the IRS ended the two-month leeway starting with the 2016 tax forms. Payers submitting 1099s must now transmit their forms by the actual due date, which is always January 31.

Since users may now find that they need to make corrections to 1099s after transmitting them to the IRS, enhancements have been made in New World ERP to support Type 1 corrections to 1099s.



Note: The IRS recognizes two types of corrections: 1) Corrected dollar amounts, and 2) corrected recipients or tax IDs. New World ERP supports Type 1 corrections only.

All 1099 processing areas are affected by the enhancements, including the 1099 List, entry, Register, Form, Transmittal, and Vendor Inquiry pages, as well as the printed register. All of these areas now accommodate the task of filing a corrected return.

Generally speaking, enhancements include the following:

- » The 1099 vendor entry page is enhanced to allow users to flag a 1099 as a Type 1 correction. See [The 1099 Vendor Entry Page](#) below.
- » The 1099 vendor entry page is enhanced to allow users to flag a 1099 as having been transmitted. See [The 1099 Vendor Entry Page](#) below.
- » The [1099 List](#), [Register](#), [Form](#), and [Transmittal](#) pages have been enhanced to allow users to filter search/output results by 1099 correction and/or transmittal status. See below.
- » Transmitted and Correction columns have been added to the printed registry. See [Register Page](#) below.
- » The printed 1099 form now includes a check box at the top of the form that will be checked if the form was previously flagged as Corrected. See [1099 Form](#) below.
- » The 1099 History node in Vendor Inquiry now includes information about corrected and transmitted status. See [Vendor Inquiry](#) below.



Note: The enhancements described herein are only for tax year 2016 and beyond. The new controls described below do not display in the software for tax years prior to 2016.

1099 List Page

Financial Management > Year-End Processing > Vendor 1099 Processing > Click 1099 List

The **Transmitted** and **Corrected** drop-down fields have been added to the search criteria portion of the 1099 List page. This allows users to filter search results based on the recipients' status regarding form transmission and correction, i.e., by whether their forms have been transmitted and/or corrected. For more information, see the table below.

Also, the **Transmitted** and **Corrected** columns have been added to the search grid. These allow users to see at-a-glance whether a given recipient's 1099 has been transmitted and/or includes corrections respectively. A green check mark  in the **Transmitted** column indicates that a recipient's information has been transmitted; a green check mark  in the **Corrected** column indicates that the recipient's information includes a correction. The grid can be sorted by either one of these values by clicking on the column name.

[illegible]

New Controls on the 1099 List Page

Name	Description
Transmitted (drop-down field)	Allows users to limit search results based on 1099 form transmission status. The following values can be selected from the drop-down list: » All - If this option is selected, all recipients matching the user-defined search criteria will be included in the grid, regardless of their transmission status. This is the field's default value. » Yes - If this option is selected, search results will be limited to recipients whose forms have already been transmitted. Recipients whose forms have not been transmitted will not appear in the search results. » No - If this option is selected, only those recipients whose forms have not yet been transmitted will be included in the search results. Recipients whose forms have been transmitted will not appear in the search results.

Name	Description
	ults.
Corrected (drop-down field)	Allows users to limit search results based on 1099 form correction status, i.e., by whether or not the forms include corrections. The following values can be selected from the drop-down list: » All - If this option is selected, all recipients matching the user-defined search criteria will be included in the grid, whether their forms include corrections or not. This is the field's default value. » Yes - If this option is selected, search results will be limited to recipients with forms that include corrections. Recipients whose forms do not include corrections will not appear in the search results. » No - If this option is selected, only those recipients whose forms do not include corrections will display in the grid. Recipients whose forms include corrections will not appear in the search results.

The 1099 Vendor Entry Page

Financial Management > Year-End Processing > Vendor 1099 Processing > Click 1099 List > Enter criteria and click Search > Click New or select a recipient from the grid

The 1099 vendor entry page has been enhanced with the addition of the **Transmitted** and **Corrected** check boxes, allowing users to indicate whether a given 1099 has been transmitted and/or corrected respectively. Also new is the **Corrected Error Type** drop-down list, which displays only when the **Corrected** check box is selected.

These controls are available for all 1099 types, i.e., 1099-Misc., 1099-INT, 1099-R, 1099-G, and 1099-S.

See the table below for a detailed description of these new controls.

Vendor 1099 Processing - 1099 List
1099 Miscellaneous Income

General **Contact Information**

Company Federal ID

Validated ☐

Transmitted ☒

Corrected ☒

Corrected Error Type

Vendor

Recipient Name

Doing Business As (DBA)

Federal Tax ID

SSN

Address Line 1

Address Line 2

Address Line 3

Zip

City

State

Account Number

FATCA Filing Requirement ☐

Box 1 - Rents

Box 2 - Royalties

Box 3 - Other Income

Box 4 - Federal Income Tax Withheld

Box 5 - Fishing Boat Proceeds

Box 6 - Medical Payments

Box 7 - Nonemployee Compensation

Box 8 - Substitute Payments

Box 9 - Direct Sales > \$5000 ☐

Box 10 - Crop Insurance

Box 13 - Golden Parachute

Box 14 - Gross Proceeds to Attorney

Box 15a - Section 409A Deferrals

Box 15b - Section 409A Income

Box 16 - State Income Tax Withheld

Box 17 - Payer's State Number

Box 18 - State Income

Save Save/New Delete Reset

New Controls in the 1099 Vendor Entry Page

Name	Description
Transmitted (check box)	This check box displays only for tax year 2016 and beyond. If a tax year prior to 2016 is opened, the Transmitted check box does not display. Selecting this check box indicates that the 1099 information has been transmitted. If the entry page is opened in New mode (i.e., accessed by clicking New on the 1099 List page), the Transmitted check box defaults to cleared. Once the check box is manually selected or cleared and then saved, the value is retained.
Corrected (check box)	This check box displays only for tax year 2016 and beyond. If a tax year prior to 2016 is opened, the Corrected check box does not display.

Name	Description
	Selecting this check box indicates that the 1099 information includes a correction. If the Transmitted check box is selected when the Corrected check box is selected, the Transmitted check box will be cleared because the system assumes that the correction has not yet been transmitted. If the entry page is opened in New mode (i.e., accessed by clicking New on the 1099 List page), the Corrected check box defaults to cleared. Once the check box is manually selected or cleared and then saved, the value is retained. When the Corrected check box is selected for a given record, the code "G" is inserted in field position 6 of the "B" record. When creating the transmittal file for corrected returns, only corrected records with a cleared Transmitted check box will be included in the file.
Corrected Error Type (drop-down field)	When the Corrected check box is selected, the new Corrected Error Type drop-down field displays beneath the Corrected check box. This field defaults to 1 and is always disabled.  Note: The IRS recognizes two types of corrections: 1) Corrected dollar amounts, and 2) corrected recipients or tax IDs. New World ERP supports Type 1 corrections only.

Also new to the entry page, when a 1099 is added and a **Vendor** is selected, the **Account Number** field will be automatically updated with the vendor's associated account number.

Vendor 1099 Processing - 1099 List
1099 Miscellaneous Income

General | **Contact Information**

Company Federal ID: 123456789
 Validated: ☐
 Transmitted: ☐
 Corrected: ☐
 Vendor: 1 - ABC ALARMS INC
 Recipient Name: ABC ALARMS INC

Account Number: 1
 FATCA Filing Requirement: ☐
 Box 1 - Rents:
 Box 2 - Royalties:
 Box 3 - Other Income:
 Box 4 - Federal Income Tax Withheld:

When a 1099-R is created in HR/Payroll and an **Employee** is selected, the employee's identification number will be automatically inserted in the **Account Number** field.

1099 Processing - 1099 List
1099 Retirement Income

General | **Contact Information** | **State Taxes** | **Local Taxes**

Company Federal ID: 382382790
 Validated: ☐
 Transmitted: ☐
 Corrected: ☐
 Employee: 6 - Beddome, Reyna W
 Recipient Name: W Beddome

Roth Contribution Date:
 Account Number: 6
 FATCA Filing Requirement: ☐
 Box 1 - Gross Distribution:
 Box 2a - Taxable Amount:
 Box 2b - Taxable Amount Not Determined: ☐

1099 Register Page

Financial Management > Year-End Processing > Click 1099 Register

The 1099 Register page has been enhanced with the addition of the **Transmitted** and **Corrected** drop-down controls. These new fields allow users to filter register report output based on transaction transmission and/or correction status.

See the table below for a detailed description of these fields.

Vendor 1099 Processing

1099 Register

Load Saved Report

Override Report Title

Distribution Group

Email Group

Select Based On

Tax Year

2017

Company Federal Tax ID

12-3456789

Validated

<All>

Transmitted

<All>

Corrected

<All>

Sort/Sequence By

Report Type

Summary

Exceeding Minimum Only

☐

Include all Remittance Addresses

☐

Available 1099 Types: 5

1099-G

1099-INT

1099-MISC

1099-R

1099-S

Selected 1099 Types: 0

Print

Reset

Save

Save As

Delete

New Controls on the 1099 Register Page

Name	Description
Transmitted <i>(drop-down field)</i>	Allows users to filter report output by transmission status, i.e., by whether or not transactions have been transmitted. The following values can be selected from the drop-down list: » All - If this option is selected, all transactions will be included on the register regardless of whether or not they have been transmitted. This is the default value. » Yes - If this option is selected, only transmitted transactions will be included on the report. Transactions that have not been transmitted will be omitted from the report. » No - If this option is selected, only those transactions that have not been transmitted will appear on the report; transmitted transactions will be omitted from the report.

Name	Description
Corrected (drop-down field)	Allows users to filter report output based on transaction correction status, i.e., based on whether or not the transactions include corrections. The following values can be selected from the drop-down list: » All - If this option is selected, both corrected and non-corrected transactions will be included on the report. This is the default value. » Yes - If this option is selected, only corrected transactions will be included on the register. Transactions that are not corrections will be omitted from the register. » No - If this option is selected, only transactions that are not corrections will be included in the report; corrected transactions will be omitted from the report.

On the register report itself, the **Corrected** and **Transmitted** columns have been added to the far right-hand side of the page. The **Corrected** column indicates whether or not a given information return includes a correction. The **Transmitted** column indicates whether or not a return has been transmitted.

See the sample register below.



1099 Register - Summary

Recipient/Transferor Name Doing Business As	Account Number	Address	City	State	Zip	Validated	Manual	Corrected	Transmitted
1099 Company: 12-3456789 - New World ERP Testing Company	1099 Year: 2016	1099 Type: MISC							
Box 1: \$0.00	Box 2: \$0.00	Box 3: \$0.00	Box 4: \$0.00	Box 5: \$0.00	Box 6: \$0.00	Box 7: \$134.42			
Box 8: \$0.00	Box 9: No	Box 10: \$0.00	Box 13: \$0.00	Box 14: \$0.00	Box 15a: \$0.00	Box 15b: \$0.00			
Box 16: \$0.00	Box 17: 123456789012345	Box 18: \$0.00							

1099 Form Page

Financial Management > Year-End Processing > Click 1099 Form

The 1099 Form page has been enhanced with the addition of the **Transmitted** and **Corrected** drop-down controls. These new fields allow users to print 1099 forms based on their transmission and/or correction status.

See the table below for a detailed description of these fields.

Vendor 1099 Processing

 1099 Form

Report Information

Tax Year 2017

Company Federal Tax ID 12-3456789

1099 Type 1099-MISC

Form Type 2017 1099-MISC Blank Copy 2

Exceeding Minimum Only ☒

Vendor

Recipient/Transferor Name

Federal Tax ID/SSN

Transmitted <All>

Corrected <All>

Print
Reset

New Controls on the 1099 Form Page

Name	Description
Transmitted (drop-down field)	Allows users to print 1099s based on their transmission status, i.e., based on whether or not the transactions have been transmitted. The following values can be selected from the drop-down list: » All - If this option is selected, 1099 forms will be printed regardless of their transmission status. This is the default value. » Yes - If this option is selected, only 1099s that have been transmitted will be printed. 1099s that have not been transmitted will not be printed. » No - If this option is selected, only 1099s that have not been transmitted will print; transmitted 1099s will not be printed.
Corrected (drop-down field)	Allows users to print 1099s based on their correction status, i.e., based on whether or not they represent a correction to a

Name	Description
	previously transmitted 1099. The following values can be selected from the drop-down list: » All - If this option is selected, both corrected and non-corrected 1099s will be printed. This is the default value. » Yes - If this option is selected, only corrected 1099s will be printed. 1099s that do not represent corrections to previously submitted 1099s will not be printed. » No - If this option is selected, only 1099s that do not represent corrections will be printed; corrected 1099s will not be printed.

1099 Form

The 1099 form has been enhanced to include the **Corrected** check box at the top of the form. If the 1099 represents a correction to a previously submitted 1099, and the **Corrected** check box was selected on the 1099 entry page, then the **Corrected** check box on the form will be automatically selected to inform the IRS that the form was previously filed.

This enhancement applies to all form types (i.e., 1099-MISC, 1099-INT, 1099-R, 1099-S, and 1099-G).

PAYER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code New World ERP Testing Company Secondary Name 1234 Main Street, Suite 500, Room 123456 TROY, MI 48098 (248)269-1000		☒ CORRECTED (if checked)		1 Gross distribution \$ 11,111,111.89		OMB No. 1545-0119 2017 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.			
		2a Taxable amount \$ 22,222,222.89		2b Taxable amount not determined ☒		Total distribution ☒		Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return. This information is being furnished to the Internal Revenue Service.			
PAYER'S federal identification number 12-3456789		RECIPIENT'S identification number 123-45-6789		3 Capital gain (included in box 2a) \$ 33,333,333.89		4 Federal income tax withheld \$ 44,444,444.89					
RECIPIENT'S name JAMES J WILLIAMS JR 1234 MAIN STREET TROY MI 48098 (248) 269-1000		5 Employee contributions / Designated Roth contributions or insurance premiums \$ 55,555,555.89		6 Net unrealized appreciation in employer's securities \$ 66,666,666.89		7 Distribution code(s) 7				8 Other \$ 88,888,888.89 88%	
		9a Your percentage of total distribution 99%		9b Total employee contributions \$ 99,999,999.89		10 Amount allocable to IRR within 5 years \$ 10,999,999.89				11 1st year of desig. Roth contrib. 11/01/2017	
		12 State tax withheld \$ 1,299,999.89		13 State/Payer's state no. 12-345678912345		14 State distribution \$ 1,499,999.89					
Account number (see instructions) 17980		15 Local tax withheld \$ 1,599,999.89		16 Name of locality DETRO		17 Local distribution \$ 1,799,999.89					

Form **1099-R** www.irs.gov/form1099r Department of the Treasury - Internal Revenue Service

1099 Transmittal Page

Financial Management > Year-End Processing > Click 1099 Transmittal

Creating a Transmittal File for Corrected and Omitted 1099 Forms

The 1099 Transmittal page has been enhanced with the addition of the **Transmitted** and **Corrected** drop-down controls. These fields allow users to indicate whether the transmittal file should consist of 1099 forms that have been transmitted or non-transmitted and corrected or non-corrected. Also, the **Final Transmission** check box has been added.

See the table below for a detailed description of these new controls.

In addition to now being able to file a corrected return, users can also create a transmittal file for **omitted** 1099 forms, i.e., new 1099 forms, opposed to corrected or original 1099 forms, that, for whatever reason, should have been sent out but weren't. Users can now create a transmittal file for just those new items.

Previously, generating the transmittal file would generate everything for the fiscal year for all types, but now you can transmit just corrected or just omitted 1099 forms, and you can do it as many times as you need to.

Vendor 1099 Processing

 **1099 Transmittal**

Report Information

Tax Year 2017

Company Federal ID 12-3456789

Transmittal Type Federal

Export Selection All

Payer Name Control

Transmitter Control Code

Exceeding Minimum Only ☒

Combined Federal/State ☐

Transmitted Yes

Corrected Yes

Final Transmission ☐

Contact Information

Name

Phone

E-Mail

Create Reset

New Controls on the 1099 Transmittal Page

Name	Description
Transmitted (drop-down field)	Allows users to determine whether or not transmitted 1099 forms should be included in the transmittal file. Available field entries are: » Yes - Indicates that transmitted 1099 forms should be included in the transmittal file. » No - Indicates that transmitted 1099 forms should not be included in the transmittal file.

Name	Description
Corrected (drop-down field)	Allows users to determine whether or not corrected 1099 forms should be included in the transmittal file. Available field entries are: » Yes - Indicates that corrected 1099 forms should be included in the transmittal file. » No - Indicates that corrected 1099 forms should not be included in the transmittal file.  Note: When creating the transmittal file for corrected returns, only corrected 1099 forms with a cleared Transmitted check box will be included in the file.
Final Transmission (check box)	Selecting this check box indicates that the transmittal will be the final transmission. If selected, the system will flag all associated transactions as transmitted so the user does not have to do that manually.

Vendor Inquiry

Inquiries > Vendors > Select a vendor > 1099 History node

The **Transmitted** and **Corrected** columns have been added to tables throughout the 1099 History node in Vendor Inquiry. A check mark ✓ in the **Transmitted** column indicates that the vendor 1099 has been transmitted. A check mark ✓ in the **Corrected** column indicates that the vendor 1099 includes a correction.

Vendor Inquiry - 1 - [Company Name]

Last Name/Business: [Text Box]
Number: [Text Box]
Go Reset

Vendors

- Documents
- User Defined
- Invoices
- Receipt of Goods
- Checks
- 1099 History**
- Purchase Orders
- Requisitions
- Bids
- Contracts
- Wire Transfers

Company Tax ID | **Company Name**

Company Tax ID: [Text Box] | Company Name: City of Troy

1099 Type

Miscellaneous

Tax Year	Transmitted	Corrected	Summary	Reprint
2016	✓	✓	[Icon]	[Icon]
2016	✓		[Icon]	[Icon]
2017		✓	[Icon]	[Icon]

1099 Type

Miscellaneous

Tax Year	Transmitted	Corrected	Summary	Reprint
2016		✓	[Icon]	[Icon]
2016	✓		[Icon]	[Icon]

New Check Box on the 1099-S Entry Page

For 2017, **Box 5** has been changed to **Foreign Transferor**. This check box is used to report the transfer of real estate by a foreign person. According to the IRS, this new box should be selected if "the transferor is a foreign person (nonresident alien, foreign partnership, foreign estate, or foreign trust)."

Box 6 is now what **Box 5** was in 2016, i.e., **Buyer's Part of Real Estate Taxes**.

Vendor 1099 Processing - 1099 List
1099 Proceeds From Real Estate

General ☒ Contact Information

Company Federal ID	382382790	Account or Escrow Number	
Validated	☐	Box 1 - Date of Closing	
Transmitted	☐	Box 2 - Gross Proceeds	
Corrected	☐	Box 3 - Property Legal Description	
Vendor		Box 4 - Transferee will Receive Special Consideration	☐
Transferor Name		Box 5 - Foreign Transferor	☐
Doing Business As (DBA)		Box 6 - Buyer's Part of Real Estate Taxes	
Federal Tax ID			
SSN			
Address Line 1			
Address Line 2			
Address Line 3			
Zip			
City			
State			

Save Save/New Delete Reset

Human Resources

eEmployee

Paperless W-2s and 1095-Cs

eSuite > MY HR > Print W2 Forms

eSuite > MY HR > Print 1095C Forms

Check boxes have been added to the [Print W-2 Forms](#) and [Print 1095-C Forms](#) pages in eSuite MY HR to give employees with primary email addresses set up in Workforce Administration the option to have their forms delivered electronically.

eSuite HR Portal

Powered by Tyler Technologies

HOME	MY HR	TIMESHEET	BENEFIT ENROLLMENT	TIME OFF REQUEST	REQUEST FOR ACTION	LOGOUT
Home » My HR » Print W2 Forms						
Print W2 Forms You can elect to receive an electronic W-2 Form by coming to this page. Select Paperless. You will receive an email stating when they will be available. Select Print W-2 Form once 2017 W-2 is available. ☒ Paperless W-2 Tax Year 2017 EIN 99887766 PRINT W2 FORM						

eSuite HR Portal

Powered by Tyler Technologies

HOME	MY HR	TIMESHEET	BENEFIT ENROLLMENT	TIME OFF REQUEST	REQUEST FOR ACTION	LOGOUT
Home » Print 1095C Forms						
Print 1095-C Forms You can elect to receive an electronic 1095 Form by coming to this page. Select Paperless. You will receive an email stating when they will be available. Select Print 1095 Form once 2017 1095 is available. ☒ Paperless 1095-C Tax Year 2017 EIN 99887766 PRINT 1095-C FORM						



Note: The messages on these pages may be customized from the [Content Configuration page](#) in eAdministration (eHR > eEmployee > Content Configuration).

 new world Administration

Home eHR ePermits eRFA eSupplier eMiscBilling eUtilities eLicensing eBids System-wide Settings

eSuite Module

First select the module for which you want to manage

Select a Module **eHumanResources**

Content Management

Select a Content Region **W-2 Print Form Message**

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, subscript, superscript, font color, text color, bulleted list, numbered list, link, unlink, image, video, table, undo, redo, indent, outdent, and code.

You can elect to receive an electronic W-2 Form by coming to this page. Select Paperless. You will receive an email stating when they will be available.
Select Print W-2 Form once 2017 W-2 is available.

 new world Administration

Home eHR ePermits eRFA eSupplier eMiscBilling eUtilities eLicensing eBids System-wide Settings

eSuite Module

First select the module for which you want to manage

Select a Module **eHumanResources**

Content Management

Select a Content Region **1095-C Print Form Message**

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, subscript, superscript, font color, text color, bulleted list, numbered list, link, unlink, image, video, table, undo, redo, indent, outdent, and code.

You can elect to receive an electronic 1095 Form by coming to this page. Select Paperless. You will receive an email stating when they will be available.
Select Print 1095 Form once 2017 1095 is available.

When the **Paperless W-2** or **Paperless 1095-C** check box is selected, a **confirmation dialog** opens.

You have elected to receive your W-2 through eSuite. An email will be sent notifying you when it is available. Contact Jim for assistance.

OK

CANCEL



Note: The message on either dialog also may be customized from the [Content Configuration page](#) (eAdministration > eHR > eEmployee > Content Configuration).

new world Administration

[Home](#)
[eHR](#)
[ePermits](#)
[eRFA](#)
[eSupplier](#)
[eMiscBilling](#)
[eUtilities](#)
[eLicensing](#)
[eBids](#)
[System-wide Settings](#)

eSuite Module
First select the module for which you want to manage
 Select a Module eHumanResources

Content Management
 Select a Content Region W-2 Paperless Confirmation Message

You have elected to receive your W-2 through eSuite. An email will be sent notifying you when it is available. Contact Jim for assistance.

new world Administration

[Home](#)
[eHR](#)
[ePermits](#)
[eRFA](#)
[eSupplier](#)
[eMiscBilling](#)
[eUtilities](#)
[eLicensing](#)
[eBids](#)
[System-wide Settings](#)

eSuite Module
First select the module for which you want to manage
 Select a Module eHumanResources

Content Management
 Select a Content Region 1095-C Paperless Confirmation Message

You have elected to receive 1095-C through eSuite. An email will be sent notifying you when it is available.

Clicking **OK** on the confirmation dialog updates new world ERP accordingly.

To let administrators control whether the **Paperless W-2** and **Paperless 1095-C** check boxes are available to users, **Show Paperless W-2** and **Show Paperless 1095-C** check boxes have been added to the [Miscellaneous Settings page](#) in eAdministration (eHR > eEmployee > Miscellaneous Settings).



[Home](#) [eHR](#) [ePermits](#) [eRFA](#) [eSupplier](#) [eMiscBilling](#) [eUtilities](#) [eLicensing](#) [eBids](#) [System-wide Settings](#)

System Module
Select a Module: eHumanResources

Miscellaneous Settings

	View	Use		View	Use
Accrual Information	☒		Benefits	☒	
Contacts/Dependents	☒	☒	Deductions	☒	
Direct Deposits	☒	☒	Personal Information	☒	☒
Positions and Pay Rates	☒		Taxes	☒	
Pay Rate Detail	☒		Paychecks	☒	☐
Print W-2 Forms	☒		Print 1095-C Forms	☒	
Print 1099-R Forms	☒				

Allow Disable Direct Deposit ☒

Show Paperless W-2 ☒

Show Paperless 1095-C ☒

Save

Maintenance

Exclude FLSA Hours

Maintenance > Human Resources > Earnings Maintenance > Hours Codes

When PERS data is created, employee contributions, based on the type of work, are attached to hours codes. Since hours codes cannot be used to pay shift time, an *FLSA Amount Only* check box has been added to the **Hours Options** section of the [Hours Code](#) page in Maintenance to allow the exclusion of hours from the calculation of FLSA-eligible earnings. Also, the *FLSA Hours* check box in this section has been renamed as *FLSA Eligible*. Selecting this box enables the *FLSA Amount Only* box.

Hours Codes List

Hours Code - COURT

Code	COURT
Active	☒
Hours Category	OTH - Other
Description	COURT TIME
Last Processed Date	NOT USED
Effective Dates	1/1/2015 - < Open >
Start Date	1/1/2015

Pay Type Information Pay Type: Hourly Hours Multiplier: 1.0000 Default Amount: \$25.0000 Default Percent: Cap at Cycle Pay: ☐	Hours Options <table border="0"> <tr> <td>Taxable Only</td> <td>☐</td> <td>Premium Pay</td> <td>☐</td> </tr> <tr> <td>Hours Accrual</td> <td>☐</td> <td>FLSA Eligible</td> <td>☒</td> </tr> <tr> <td>Salary</td> <td>☐</td> <td>FLSA Amount Only</td> <td>☒</td> </tr> <tr> <td>Seniority Hours</td> <td>☐</td> <td>Pension Hours</td> <td>☐</td> </tr> <tr> <td>Employee G/L Override</td> <td>☐</td> <td>Apply to Longevity</td> <td>☐</td> </tr> <tr> <td>Productive Hours</td> <td>☒</td> <td>Apply to Accruals</td> <td>☐</td> </tr> <tr> <td>Workers' Compensation Hours</td> <td>☐</td> <td>Certification Applies</td> <td>☐</td> </tr> <tr> <td>FMLA Eligible Hours</td> <td>☐</td> <td>Apply to Contract Pay</td> <td>☐</td> </tr> <tr> <td>FMLA Taken Hours</td> <td>☐</td> <td>Time Off Eligible</td> <td>☐</td> </tr> </table>	Taxable Only	☐	Premium Pay	☐	Hours Accrual	☐	FLSA Eligible	☒	Salary	☐	FLSA Amount Only	☒	Seniority Hours	☐	Pension Hours	☐	Employee G/L Override	☐	Apply to Longevity	☐	Productive Hours	☒	Apply to Accruals	☐	Workers' Compensation Hours	☐	Certification Applies	☐	FMLA Eligible Hours	☐	Apply to Contract Pay	☐	FMLA Taken Hours	☐	Time Off Eligible	☐
Taxable Only	☐	Premium Pay	☐																																		
Hours Accrual	☐	FLSA Eligible	☒																																		
Salary	☐	FLSA Amount Only	☒																																		
Seniority Hours	☐	Pension Hours	☐																																		
Employee G/L Override	☐	Apply to Longevity	☐																																		
Productive Hours	☒	Apply to Accruals	☐																																		
Workers' Compensation Hours	☐	Certification Applies	☐																																		
FMLA Eligible Hours	☐	Apply to Contract Pay	☐																																		
FMLA Taken Hours	☐	Time Off Eligible	☐																																		

Distribution [Select One] Debit Account: 501010 - Full-Time Wages Debit G/L Account: Project Information Project Requirement: Optional
--

Save Save/New Delete Reset Copy Tax Information Excluded Hours Excluded Accrual Profiles

If an hours code has *FLSA Amount Only* selected, only the earnings will be used in the FLSA calculation; the hours will not be used to determine whether an employee has reached or exceeded the threshold hours.

Example: If an employee is paid \$20 for an hour of court time and the *FLSA Amount Only* check box is selected on the hours code for court time, only the \$20 will be used in the FLSA calculation, and the hour will be excluded.



Note: The *FLSA Amount Only* check box does not apply if a custom FLSA calculation is being used.

Paperless W-2 and 1095-C Email Templates

Maintenance > new world ERP Suite > System > Email Templates

Templates to announce the availability of paperless W-2s and 1095-Cs have been added to the Email Template Setup page.

Use the [All W-2 Employees and All 1095-C Employees templates](#) to inform employees of the [options in eSuite](#) to have their W-2s and 1095-Cs delivered electronically.

 **new world**
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

new world ERP

Email Template Setup

Template Setup

Application
Human Resources

Module
W-2

Template
All W-2 Employees

From Address *
mary.rajczi@tylertech.com

Subject Line *
W-2 Forms Delivery Option

Additional Emails

SAVE RESET

B I U S x₂ x² A T

W-2's Delivery Option **All Employees**

Hello [EmployeeFirstName], [EmployeeLastName] [EmployeeNumber]
[EmployeeFullName]

You have the option of selecting "Go Paperless" in [eSuite](#) and your W-2's will not be mailed.

Please sign in to [eSuite](#), go to W-2's and select Go Paperless if you would not like a W-2 mailed to you.

[Hello Click Me](#)

[Click here to access your eSuite account.](#)

Best regards,
New World Human Resources

 **new world**
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

new world ERP

Email Template Setup

Template Setup

Application
Human Resources

Module
1095-C

Template
All 1095-C Employees

From Address *
mary.rajczi@tylertech.com

Subject Line *
1095-C Forms Delivery Option

Additional Emails

SAVE RESET

B I U S x₂ x² A T

1095-C's Delivery Option **All Employees**

Hello [EmployeeFullName]
[EmployeeFirstName] [EmployeeLastName][EmployeeNumber]

You have the option of selecting "Go Paperless" in [eSuite](#) and your 1095-C's will not be mailed.

Please sign in to [eSuite](#), go to 1095-C's and select Go Paperless if you would not like a 1095-C mailed to you.

[eSuiteLink](#)

[Click here to access your eSuite account.](#)

Best regards,
New World Human Resources

W-2 emails are sent if the *Send All W-2 Employees Email* check box is selected on the **W-2 Company** tab. 1095-C emails are sent if the *Send All 1095-C Employees Email* check box is selected on the **eSuite** tab of the Applicable Large Member Employer page.

Use the **Selected Go Paperless templates** to inform employees that their W-2s and 1095-Cs are available in eSuite.


new world™
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new world ERP

Template Setup

Application
 Human Resources

Module
 W-2

Template
 Selected Go Paperless Employees

From Address *
 mary.rajczi@tylertech.com

Subject Line *
 W-2 Forms Are Available

Additional Emails

SAVE RESET

B I U x₂ x² A T_I

[TaxYear] W-2's are available [Selected Employees](#)
 Hello [EmployeeFirstName], [EmployeeLastName] [EmployeeNumber]
 [EmployeeFullName]
 Your W-2 is now available in eSuite. Please click here to access your [eSuite](#) account.
 You have selected to Go Paperless; therefore a paper copy will not be sent. Paper copies will be available upon request.
 Best regards,
 New World Human Resources


new world™
 myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

new world ERP

Template Setup

Application
 Human Resources

Module
 1095-C

Template
 Selected Go Paperless Employees

From Address *
 mary.rajczi@tylertech.com

Subject Line *
 1095-C Forms Are Available

Additional Emails

SAVE RESET

B I U x₂ x² A T_I

[TaxYear] 1095-C's are available [Selected Employees](#)
 Hello [EmployeeFirstName], [EmployeeLastName][EmployeeNumber]
 [EmployeeFullName]
 Your 1095-C is now available in eSuite. Please click here to access your [eSuite](#) account.
 You have selected to Go Paperless; therefore a paper copy will not be sent. Paper copies will be available upon request.
 Best regards,
 New World Human Resources



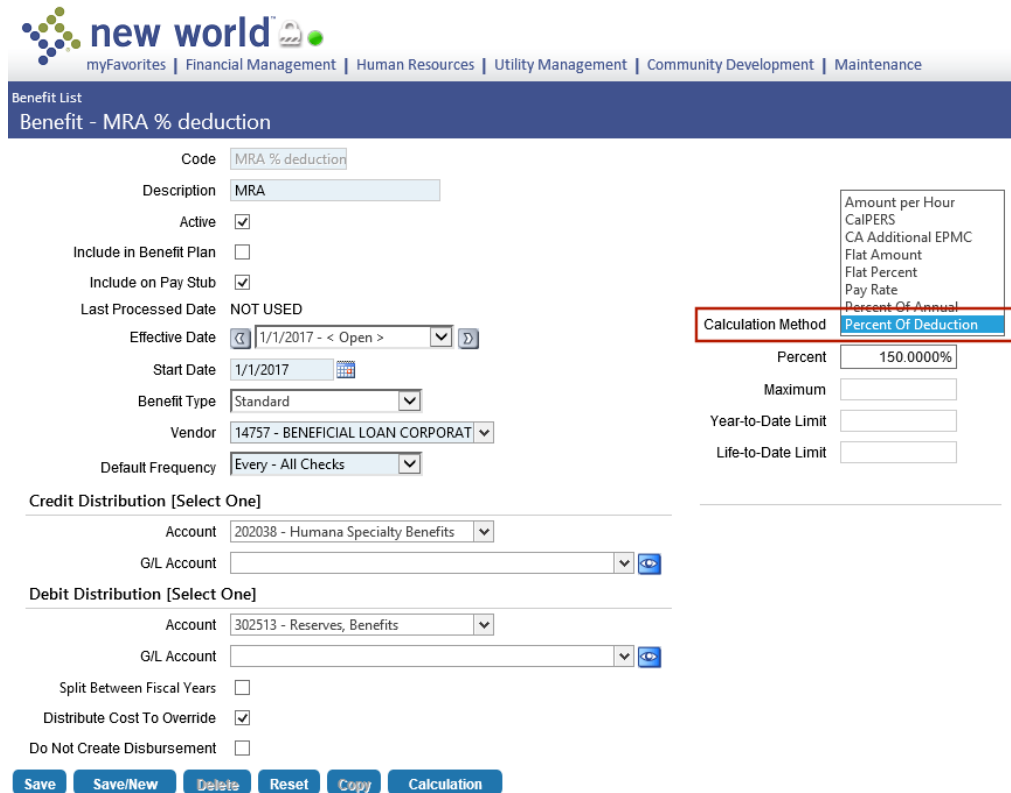
Note: If an email is rejected due to an invalid email address, the **From Address** in the Template Setup panel will receive the rejected email. This address is defaulted from the **From Email Address** field in System Settings Maintenance (Maintenance > new world ERP Suite > System > System Settings), but it may be overridden on the Email Template Setup page.

For more on the Email Template Setup page, click [here](#).

Percent of Deduction Calculation Method

Maintenance > Human Resources > Deductions and Benefits > Benefits

To let you set up a benefit to be calculated as a percent of associated deductions, a **Percent of Deduction** option has been added to the *Calculation Method* drop-down on the [Benefit](#) page.



The screenshot shows the 'Benefit List' page with the 'Benefit - MRA % deduction' form. The 'Calculation Method' dropdown is highlighted with a red box, showing options: Amount per Hour, CalPERS, CA Additional EPMC, Flat Amount, Flat Percent, Pay Rate, Percent Of Annual, and Percent Of Deduction. The 'Percent Of Deduction' option is selected. The form includes fields for Code (MRA % deduction), Description (MRA), Active (checked), Include in Benefit Plan (unchecked), Include on Pay Stub (checked), Last Processed Date (NOT USED), Effective Date (1/1/2017 - < Open >), Start Date (1/1/2017), Benefit Type (Standard), Vendor (14757 - BENEFICIAL LOAN CORPORAT), Default Frequency (Every - All Checks), Credit Distribution (Select One) with Account 202038 - Humana Specialty Benefits, Debit Distribution (Select One) with Account 302513 - Reserves, Benefits, Split Between Fiscal Years (unchecked), Distribute Cost To Override (checked), and Do Not Create Disbursement (unchecked). Buttons at the bottom include Save, Save/New, Delete, Reset, Copy, and Calculation.

With this option, when a deduction limit changes, the benefit automatically will be calculated as a ratio of the limit.

The Percent of Deduction may exceed 100%; for example, if the benefit is 150% of the associated deductions, the benefit will be calculated as 1.5 times the deduction limit.

Selecting Percent of Deduction displays and enables the following fields below the Calculation Method drop-down:

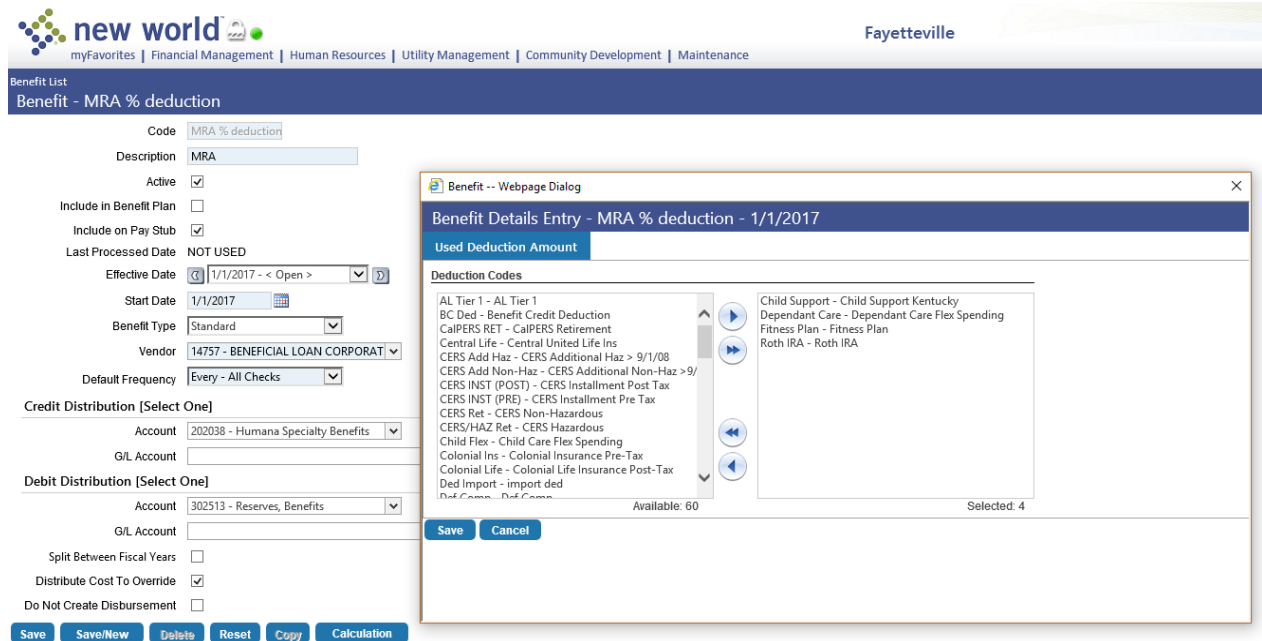
» *Percent*

» *Maximum*

» Year-to-Date Limit

» Life-to-Date Limit

For a benefit with a calculation method of Percent of Deduction, the Benefit Details Entry dialog, opened by clicking the **Calculation** button, contains a **Used Deduction Amount** tab for selecting the deduction codes that apply to the selected benefit.



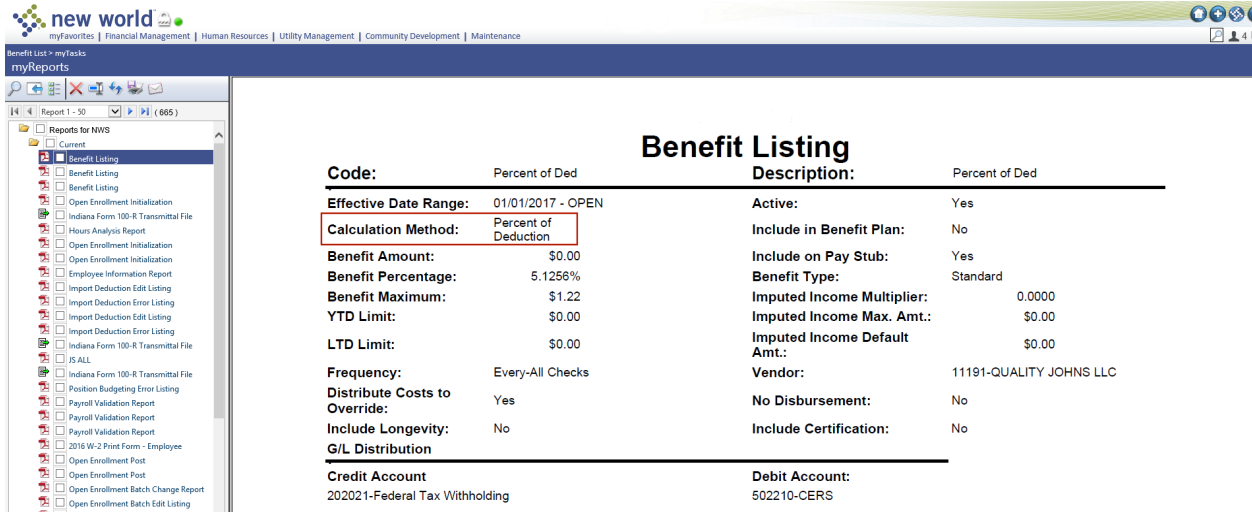
The screenshot displays the 'new world' software interface. The main window shows the 'Benefit List' with 'Benefit - MRA % deduction' selected. The 'Benefit Details Entry' dialog is open, showing the 'Used Deduction Amount' tab. The dialog lists various deduction codes, including 'AL Tier 1 - AL Tier 1', 'BC Ded - Benefit Credit Deduction', 'CalPERS RET - CalPERS Retirement', 'Central Life - Central United Life Ins', 'CERS Add Haz - CERS Additional Haz > 9/1/08', 'CERS Add Non-Haz - CERS Additional Non-Haz > 9/1/08', 'CERS INST (POST) - CERS Installment Post Tax', 'CERS INST (PRE) - CERS Installment Pre Tax', 'CERS Ret - CERS Non-Hazardous', 'CERS/HAZ Ret - CERS Hazardous', 'Child Flex - Child Care Flex Spending', 'Colonial Ins - Colonial Insurance Pre-Tax', 'Colonial Life - Colonial Life Insurance Post-Tax', 'Ded Import - import ded', 'Ded Comm - Ded Comm', 'Child Support - Child Support Kentucky', 'Dependant Care - Dependant Care Flex Spending', 'Fitness Plan - Fitness Plan', and 'Roth IRA - Roth IRA'. The 'Available' count is 60 and the 'Selected' count is 4. The dialog has 'Save' and 'Cancel' buttons.



Note: Only deductions that are not part of a benefit plan are available for selection.

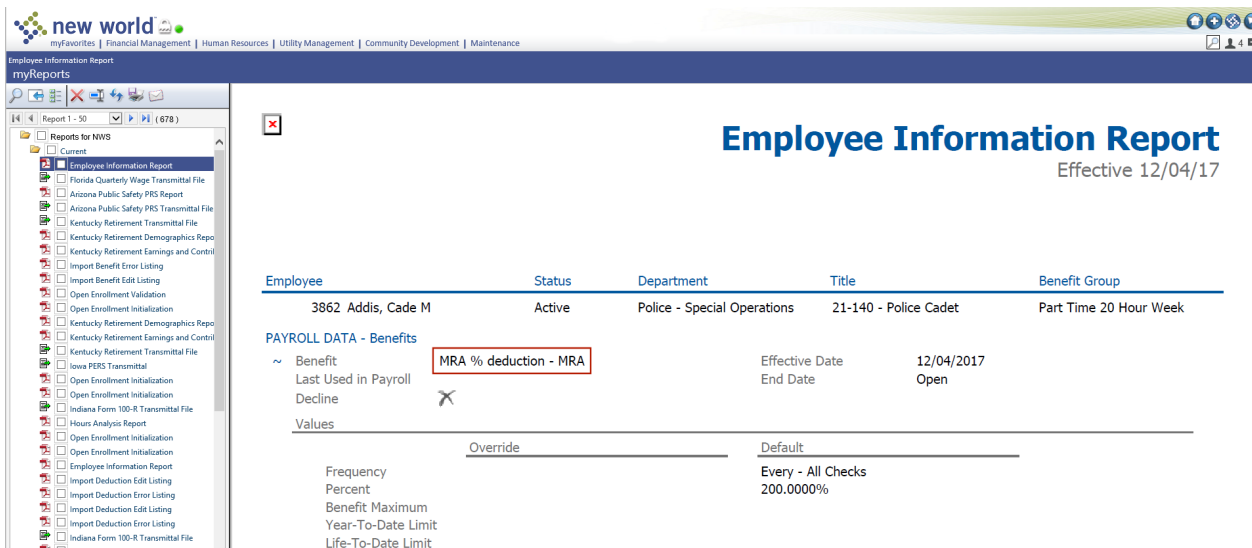
The payroll calculation, Position Budgeting calculation and Workforce Administration have been updated to support the Percent of Deduction calculation.

The **Benefit Listing and Employee Information Report** also have been updated to include the new calculation method.



Benefit Listing

Code:	Percent of Ded	Description:	Percent of Ded
Effective Date Range:	01/01/2017 - OPEN	Active:	Yes
Calculation Method:	Percent of Deduction	Include in Benefit Plan:	No
Benefit Amount:	\$0.00	Include on Pay Stub:	Yes
Benefit Percentage:	5.1258%	Benefit Type:	Standard
Benefit Maximum:	\$1.22	Imputed Income Multiplier:	0.0000
YTD Limit:	\$0.00	Imputed Income Max. Amt.:	\$0.00
LTD Limit:	\$0.00	Imputed Income Default Amt.:	\$0.00
Frequency:	Every-All Checks	Vendor:	11191-QUALITY JOHNS LLC
Distribute Costs to Override:	Yes	No Disbursement:	No
Include Longevity:	No	Include Certification:	No
G/L Distribution			
Credit Account	202021-Federal Tax Withholding	Debit Account:	502210-CERS



Employee Information Report
Effective 12/04/17

Employee	Status	Department	Title	Benefit Group
3862 Addis, Cade M	Active	Police - Special Operations	21-140 - Police Cadet	Part Time 20 Hour Week

PAYROLL DATA - Benefits

Benefit	MRA % deduction - MRA	Effective Date	End Date
~ Benefit		12/04/2017	
Last Used in Payroll		Open	
Decline	X		

Values

Override	Default
Frequency	Every - All Checks
Percent	200.0000%
Benefit Maximum	
Year-To-Date Limit	
Life-To-Date Limit	

Payroll Processing

Imputed Income Pays per Year Override

Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List

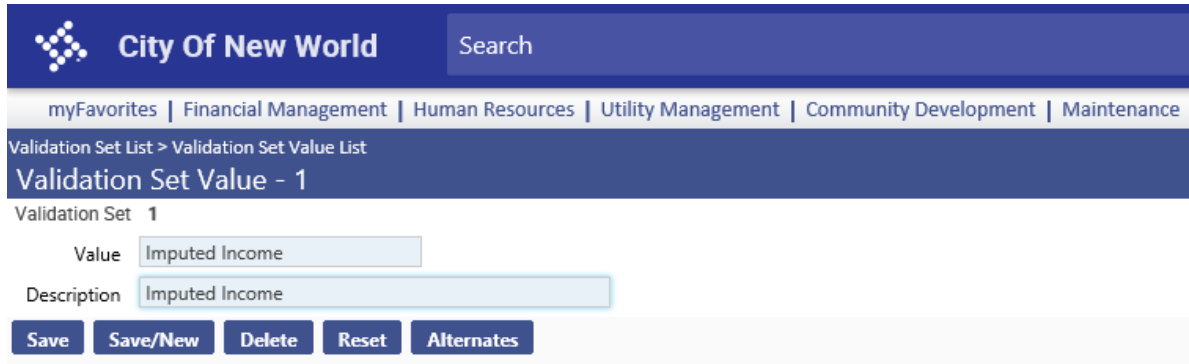
To give you the ability to override the number of pays per year in the imputed income calculation for selected pay groups, follow the steps below to create a validation set alternate usage type of Imputed Income and apply it to the appropriate pay groups in the Pay Group validation set.

Imputed Income Alternate Usage Type

1. Navigate to Maintenance > new world ERP Suite > System > Validation Sets >

Validation Set List.

2. Select the **Set Number 1-Validation Set Alternate Usage Type** row.
3. Click the **Values** button.
4. Click the **New** button. The Validation Set Value-1 page opens.
5. In the *Value* field, type **Imputed Income**.
6. In the *Description* field, type **Imputed Income**. [View](#).



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Validation Set List > Validation Set Value List

Validation Set Value - 1

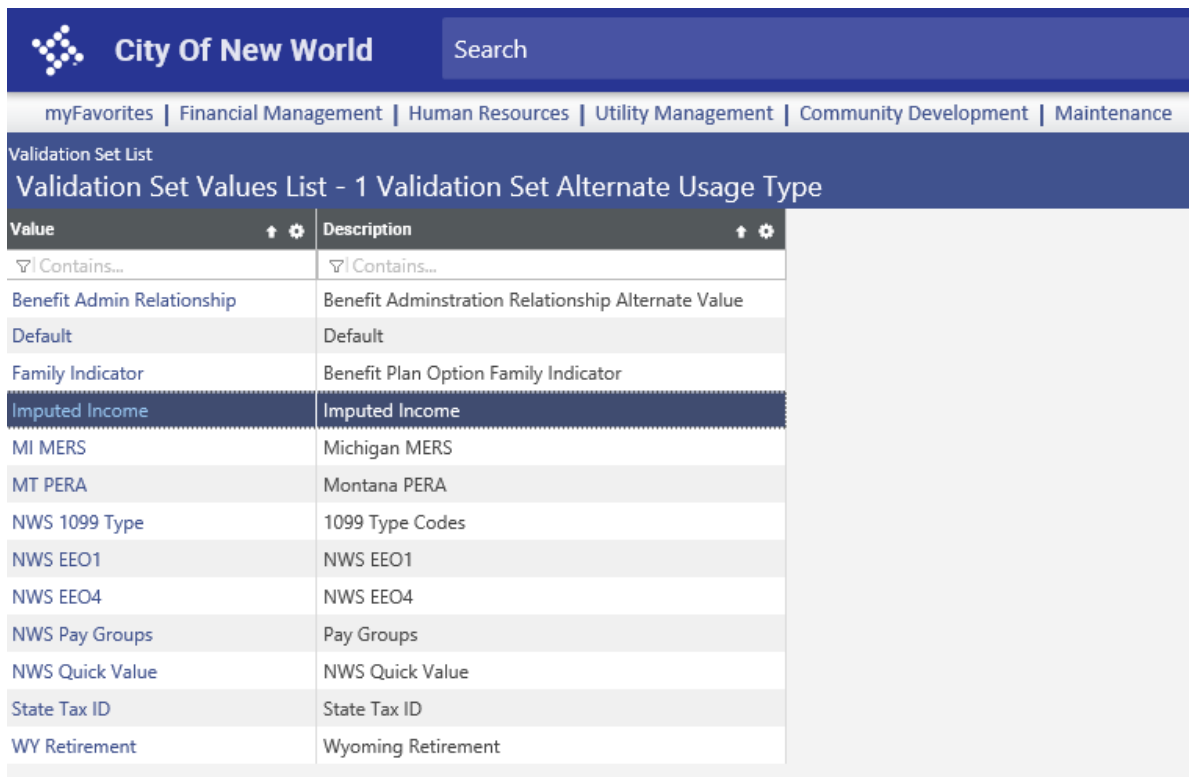
Validation Set **1**

Value

Description

[Save](#) [Save/New](#) [Delete](#) [Reset](#) [Alternates](#)

7. Click **Save**. **Imputed Income** is added to the Validation Set Alternate Usage Type [View](#).



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

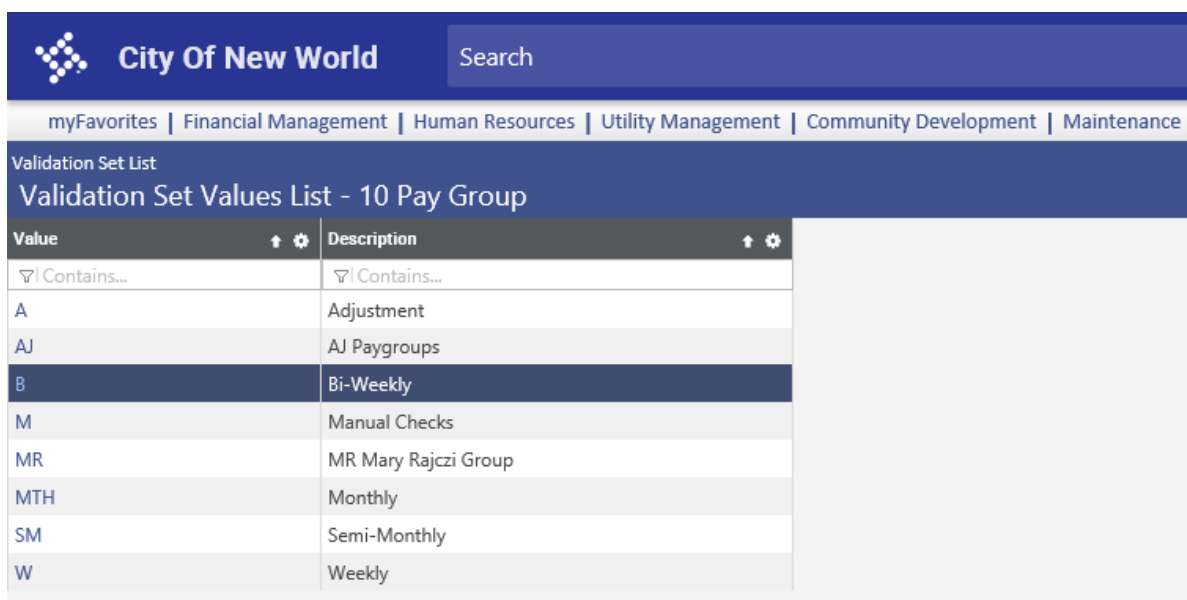
Validation Set List

Validation Set Values List - 1 Validation Set Alternate Usage Type

Value	Description
▽ Contains...	▽ Contains...
Benefit Admin Relationship	Benefit Administration Relationship Alternate Value
Default	Default
Family Indicator	Benefit Plan Option Family Indicator
Imputed Income	Imputed Income
MI MERS	Michigan MERS
MT PERA	Montana PERA
NWS 1099 Type	1099 Type Codes
NWS EEO1	NWS EEO1
NWS EEO4	NWS EEO4
NWS Pay Groups	Pay Groups
NWS Quick Value	NWS Quick Value
State Tax ID	State Tax ID
WY Retirement	Wyoming Retirement

Apply Imputed Income Alternate Value to Pay Group

1. Navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List.
2. Select the **Set Number 10-Pay Group** row.
3. Click the **Values** button. The Validation Set Values List-10 Pay Group page opens, containing a grid of pay groups. [View](#).



The screenshot shows the City Of New World ERP Suite interface. At the top is a navigation bar with the City Of New World logo and a search bar. Below the navigation bar is a menu bar with links to myFavorites, Financial Management, Human Resources, Utility Management, Community Development, and Maintenance. The main content area is titled "Validation Set List" and "Validation Set Values List - 10 Pay Group". It displays a table with two columns: "Value" and "Description". The table contains the following rows:

Value	Description
▽ Contains...	▽ Contains...
A	Adjustment
AJ	AJ Paygroups
B	Bi-Weekly
M	Manual Checks
MR	MR Mary Rajczi Group
MTH	Monthly
SM	Semi-Monthly
W	Weekly

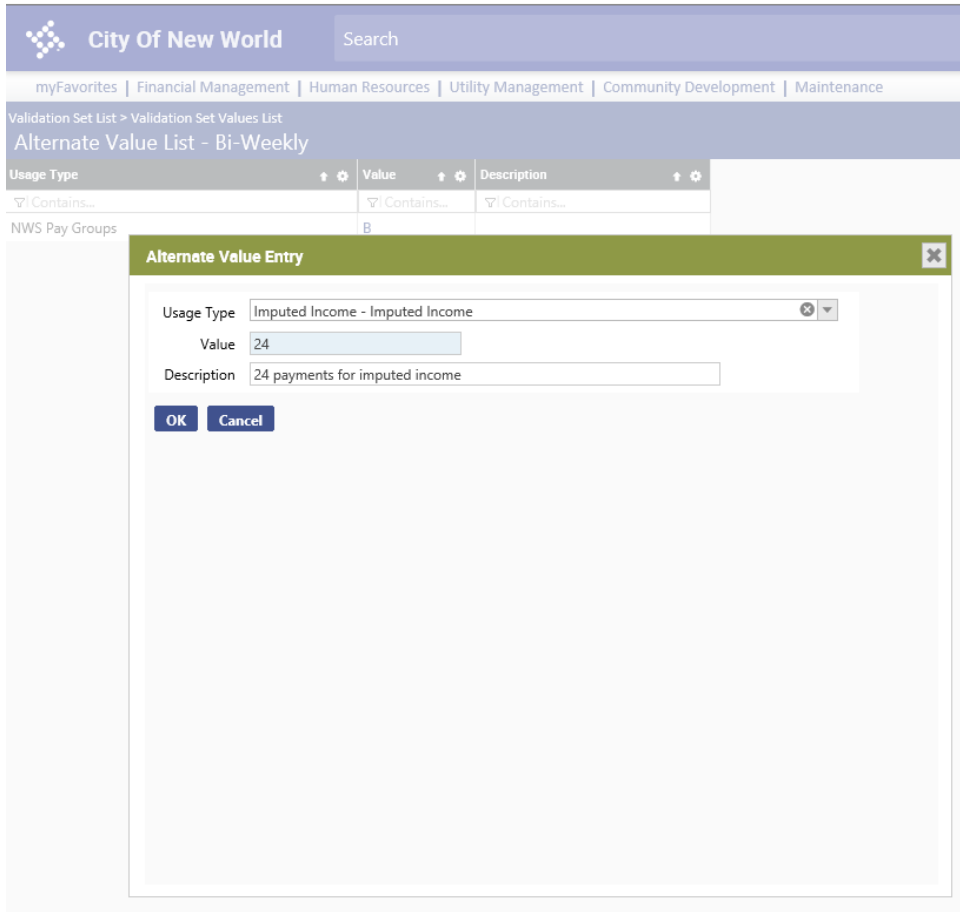
4. Select the appropriate pay group.
5. Click the **Alternates** button. The Alternate Value List page for that pay group opens.
6. Click the **New** button. The Alternate Value Entry dialog opens.
7. For *Usage Type*, select **Imputed Income** from the drop-down.
8. In the Value field, type the number of override pays that will be used to divide the annual imputed income. The number of pays specified here will be used for the pay group for any frequency set up at the imputed benefit code that exceeds more than one payment per month, i.e., 24 pays, 26 pays, 48 pays, 52 pays.



Note: Make sure the override number matches the frequency in number of pays on the imputed income benefit code. If the frequency on the benefit code is set for one time per month, the override alternate value is ignored in the calculation.

9. Type a meaningful *Description*—for example, **24 payments for imputed income**.

View.



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Validation Set List > Validation Set Values List
Alternate Value List - Bi-Weekly

Usage Type	Value	Description
▽ Contains...	▽ Contains...	▽ Contains...
NWS Pay Groups	B	

Alternate Value Entry

Usage Type: Imputed Income - Imputed Income

Value: 24

Description: 24 payments for imputed income

OK Cancel

10. Click **OK**. The Imputed Income alternate value is added to the Alternate Value List grid for the selected pay group. **View.**



City Of New World Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Validation Set List > Validation Set Values List
Alternate Value List - Bi-Weekly

Usage Type	Value	Description
▽ Contains...	▽ Contains...	▽ Contains...
Imputed Income	24	24 payments for imputed income
NWS Pay Groups	B	

Reports

Benefit and Deduction Registers

Human Resources > Reports > Pay Day Reports/Pay Day History Reports> Benefit Register/Deduction Register

A *Separate Check* column has been added to the outputs of the Benefit Register and Deduction Register. For registers run from the Pay Day History menu, a **Void** indicator also has been added for checks voided during the time period being reported.



Note: The outputs show voided checks at the time the register is run. Totals reflect actual totals at the time the pay batch was posted.

The *Separate Check* column breaks down the deduction amount for each manual check.

Deduction Register sorted by *Deduction Code-Employee*

Deduction Register Report									
Pay Date Range 02/04/18 - 02/17/18									
Sort by Deduction - Employee									
Pay Batch 2201829									
Employee	Separate Check	Amount	YTD Amount	LTD Amount	Net Pay Minimum	Limit Amount	Type		
Deduction Type: Garnishment - Garnishment									
3491 Dronkoš, Katelyn& SL		100.00	100.00	700.00	.00	.00	Life-to-date		
Case Number	Garnishment Amount	Garnishment Percent							
1	20.00								
2	70.00								
3	10.00								
599 Nuth, Alexandra A	Manual Check: Void	100.00	100.00	100.00	.00	.00	Life-to-date		
Case Number	Garnishment Amount	Garnishment Percent							
1	51.00								
2	49.00								
599 Nuth, Alexandra A	Manual Check	100.00	100.00	100.00	.00	.00	Life-to-date		
Case Number	Garnishment Amount	Garnishment Percent							
1	51.00								
2	49.00								
Deduction: Garnishment - Garnishment Totals Employees 2		\$300.00							

Run by NWS on 02/26/2018 10:29:47 AM

Page 16 of 31

Deduction Register Report									
Pay Date Range 02/04/18 - 02/17/18									
Sort by Deduction - Employee									
Pay Batch 2201829									
Employee	Separate Check	Amount	YTD Amount	LTD Amount	Net Pay Minimum	Limit Amount	Type		
Deduction Type: YTD Limit - YTD Limit									
599 Nuth, Alexandra A	Incentive	4.17	43.47	43.47	.00	4,222.22	Year-to-date		
599 Nuth, Alexandra A	Manual Check: Void	39.30	43.47	43.47	.00	4,222.22	Year-to-date		
599 Nuth, Alexandra A	Manual Check	39.30	43.47	43.47	.00	4,222.22	Year-to-date		
2									
Deduction: YTD Limit - YTD Limit Totals Employees 1		\$82.77							
Grand Totals		\$10,020.22							

Void column will display voided checks at the time this report is run. The totals will reflect the actual totals at the time the pay batch was posted.

Run by NWS on 02/26/2018 10:30:41 AM

Page 31 of 31

Deduction Register sorted by *Employee-Deduction Code*

Deduction Register Report									
Pay Date Range 02/04/18 - 02/17/18									
Sort by Employee - Deduction									
Pay Batch 2201829									
Deduction Code	Deduction Description	Separate Check	Amount	YTD Amount	LTD Amount	Net Pay Minimum	Limit	Amount	Type
LTD Limit	LTD Limit	Incentive	1.33	2.66	2.66	.00	4,222.22	Life-to-date	
User Def Range	User Defined Range	Incentive	1.23	2.46	2.46	.00	4,222.22	User Defined (12/01/17 - 06/30/18)	
YTD Limit	YTD Limit	Incentive	4.17	43.47	43.47	.00	4,222.22	Year-to-date	
Colonial Life	Colonial Life Insurance Post-Tax	Manual Check Void	14.13	14.13	14.13	.00	.00	Year-to-date	
Flex Spending	Medical Flex	Manual Check Void	19.24	19.24	19.24	.00	.00	Year-to-date	
Garnishment	Garnishment	Manual Check Void	100.00	100.00	100.00	.00	.00	Life-to-date	
Case Number	Garnishment Amount	Garnishment Percent							
1	51.00								
2	49.00								
ICMA Defer Comp	ICMA Deferred Comp 457	Manual Check Void	75.00	75.00	75.00	.00	24,000.00	Year-to-date	
LTD Limit	LTD Limit	Manual Check Void	1.33	2.66	2.66	.00	422.22	Life-to-date	
Medical 750	Health Ins Plan 750	Manual Check Void	5.54	5.54	5.54	.00	.00	Year-to-date	
Roth IRA	Roth IRA	Manual Check Void	100.00	100.00	100.00	.00	6,500.00	Year-to-date	
User Def Range	User Defined Range	Manual Check Void	1.23	2.46	2.46	.00	4,222.22	User Defined (12/01/17 - 06/30/18)	
YTD Limit	YTD Limit	Manual Check Void	39.30	43.47	43.47	.00	4,222.22	Year-to-date	
Colonial Life	Colonial Life Insurance Post-Tax	Manual Check 2	14.13	14.13	14.13	.00	.00	Year-to-date	
Flex Spending	Medical Flex	Manual Check 2	19.24	19.24	19.24	.00	.00	Year-to-date	
Garnishment	Garnishment	Manual Check 2	100.00	100.00	100.00	.00	.00	Life-to-date	
Case Number	Garnishment Amount	Garnishment Percent							
1	51.00								
2	49.00								
ICMA Defer Comp	ICMA Deferred Comp 457	Manual Check 2	75.00	75.00	75.00	.00	24,000.00	Year-to-date	
LTD Limit	LTD Limit	Manual Check 2	1.33	2.66	2.66	.00	422.22	Life-to-date	

Employee Audit Report

Human Resources > Reports > Employee Reports > Employee Audit Report

The **Employee Audit Report** has been updated to show changes to the **Paperless W-2 and Paperless 1095-C check box selections** in eEmployee.

Employee Audit Report

Load Saved Report
 Override Report Title

Distribution Group
 Email Group

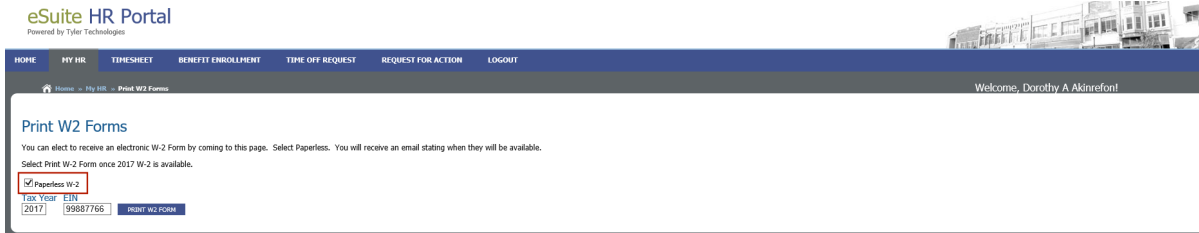
From Date
 To Date
 Sort By

Select By
 Employee

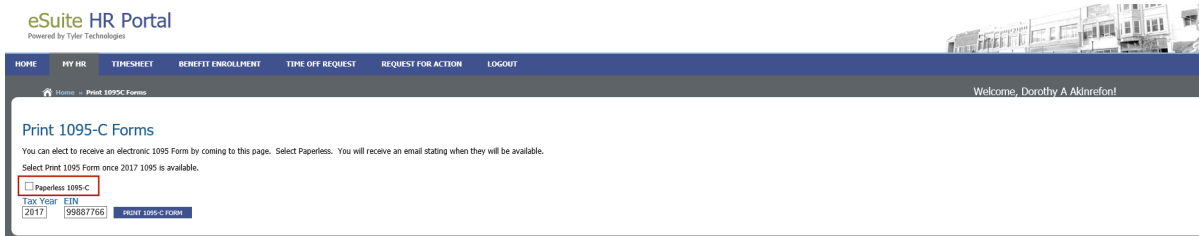
Departments	Sections	Users
1100 - Board of Commissioners 1200 - Administration 1300 - Citizen Information & Assistance 1400 - Finance 1421 - Finance - Treasury 1422 - Finance - Licensing 1432 - Finance - Accounting 1434 - Finance - Payroll 1500 - Human Resources 1600 - Legal 1700 - Information Technology 2100 - Police 2111 - Police - Administration 2121 - Police - Professional Standards 2122 - Police - Records 2123 - Police - Communications 2124 - Police - Evidence 2131 - Police - Criminal Investigations		

Available Department(s): 57

Selected Department(s): 0



The screenshot shows the 'eSuite HR Portal' interface. The top navigation bar includes links for HOME, MY HR, TIMESHEET, BENEFIT ENROLLMENT, TIME OFF REQUEST, REQUEST FOR ACTION, and LOGOUT. The user is logged in as Dorothy A Akinrefon. The main content area is titled 'Print W2 Forms' and contains instructions: 'You can elect to receive an electronic W-2 Form by coming to this page. Select Paperless. You will receive an email stating when they will be available. Select Print W-2 Form once 2017 W-2 is available.' There is a checkbox labeled 'Paperless W-2' which is checked. Below this, there are input fields for 'Tax Year' (2017) and 'EIN' (99887766), followed by a 'PRINT W2 FORM' button.



The screenshot shows the 'eSuite HR Portal' interface. The top navigation bar is the same as the previous screenshot. The user is logged in as Dorothy A Akinrefon. The main content area is titled 'Print 1095-C Forms' and contains instructions: 'You can elect to receive an electronic 1095 Form by coming to this page. Select Paperless. You will receive an email stating when they will be available. Select Print 1095 Form once 2017 1095 is available.' There is a checkbox labeled 'Paperless 1095-C' which is checked. Below this, there are input fields for 'Tax Year' (2017) and 'EIN' (99887766), followed by a 'PRINT 1095-C FORM' button.

Run the report as follows:

1. Select a *From Date* and *To Date* to capture paperless W-2 and 1095-C changes that occurred within this date range.
2. Select a *Sort By* method: **Employee-Section**, **User-Employee** or **Section-Employee**.
3. Select **Department** or **Employee** in the *Select By* drop-down.
4. If you are running the report by employee, select the *Employee*. If you are running the report by department, select the department(s) on the **Departments** tab of the multi-select list boxes. (This tab is disabled if you are running the report by employee.)
5. On the **Sections** tab of the multi-select list boxes, select **Personal-Demographics**.
6. On the **Users** tab, select the user(s) who approved changes. To capture changes that did not require approvals, select **[None]**.

View selections on the Employee Audit Report page.

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myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Employee Audit Report

Load Saved Report Distribution Group 

Override Report Title Email Group

From Date To Date Select By

Sort By Employee

Departments **Sections** Users

Job - Events
Job - G/L Distribution
Job - Payroll
Job - Position
Job - Roster Card
Payroll Data - Benefit Plans
Payroll Data - Benefit Plans Beneficiary
Payroll Data - Benefit Plans Dependent
Payroll Data - Benefits
Payroll Data - Certifications
Payroll Data - Deductions
Payroll Data - Direct Deposit
Payroll Data - Taxes
Personal - Address
Personal - Contacts/Dependents
Personal - Email
Personal - Name
Personal - Phone

Personal - Demographics

Available Section(s): 21 Selected Section(s): 1

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Employee Audit Report

Load Saved Report Distribution Group 

Override Report Title Email Group

From Date To Date Select By

Sort By Employee

Departments **Sections** **Users**

ABELL/IRVIN ELEVATOR
ABNEY & HOPKINS FIRE
ADDCO MFG CO INC
ADVANCED OFFICE MACH
ADVANCED OFFICE MACH
ADVANCED OFFICE MACH
ADVANCED SOLUTIONS I
ADVANTAGE BRANDS COR
AGRICULTURE DEPT DEV
ALBERT GOLF SALES
ALEENES DIV OF ARTIS
ALEXANDER & ALEXANDE
ALLIANCE FOR COMMUNI
ALLIANCE PRODUCTIONS
ALLPEST CHEMICAL CO
ALMA LYNNE DESIGNS I
AMERICAN CEMETERY IN
AMERICAN ENGINEERS I

NWS
[None]

Available User(s): 254 Selected User(s): 2

- Click the **Print** button at the bottom of the page. The **report output** will display, giving you the option to save it in various formats or send it to myReports as a PDF.

1 of 1 100% Find | Next Send to myReports

Employee Audit Report
Date Range 12/01/17 - 12/31/17
Sort by User - Employee

Word
Excel
PowerPoint
PDF
TIFF file
MHTML (web archive)
CSV (comma delimited)
XML file with report data
Data Feed
CSV (comma delimited)

Department	Change	Field Name	Old Value	New Value	User	Area
User Akinrefon, Dorothy A						
Employee Akinrefon, Dorothy A						
Record Identifier 919 Akinrefon, Dorothy A						
2121 - Police - Professional Standards	Update	Paperless W-2	No	Yes	Akinrefon, Dorothy A	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless W-2	Yes	No	Akinrefon, Dorothy A	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless W-2	No	Yes	Akinrefon, Dorothy A	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless 1095-C	No	Yes	Akinrefon, Dorothy A	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless W-2	No	Yes	Akinrefon, Dorothy A	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless 1095-C	Yes	No	Akinrefon, Dorothy A	Workforce Administration
User NWS						
Employee Akinrefon, Dorothy A						
Record Identifier 919 Akinrefon, Dorothy A						
2121 - Police - Professional Standards	Update	Paperless W-2	Yes	No	NWS	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless W-2	Yes	No	NWS	Workforce Administration

Run by nws on 12/14/2017 10:37:11 AM Page 1 of 1

Paperless W-2 and 1095-C statuses also have been added to the report.

Employee Audit Report - Internet Explorer

1 of 1 100% Find | Next

Employee Audit Report
Date Range 12/01/17 - 12/31/17
Sort by Employee - Section

Department	Change	Field Name	Old Value	New Value	Changed Date	User	Area
Employee 3736 Agueda, Solomon S							
Section Employee - Demographics							
Record Identifier 3736 Agueda, Solomon S							
4111 - Parks - Administration	Update	Paperless 1095-C	No	Yes	12/1/2017 10:52 AM	NWS	Workforce Administration
Employee 919 Akinrefon, Dorothy A							
Section Employee - Demographics							
Record Identifier 919 Akinrefon, Dorothy A							
2121 - Police - Professional Standards	Update	Paperless W-2	Yes	No	12/1/2017 9:56 AM	NWS	Workforce Administration
2121 - Police - Professional Standards	Update	Paperless W-2	Yes	No	12/12/2017 1:34 PM	NWS	Workforce Administration
Employee 1725 Auck, Braiden V Jr							
Section Employee - Demographics							
Record Identifier 1725 Auck, Braiden V Jr							
3400 - PW - Fleet	Update	Paperless 1095-C	No	Yes	12/1/2017 2:29 PM	NWS	Workforce Administration
Employee 955 Auiles, Gilbert B							
Section Employee - Demographics							
Record Identifier 955 Auiles, Gilbert B							
1700 - Information Technology	Update	Paperless 1095-C	No	Yes	12/1/2017 2:28 PM	NWS	Workforce Administration
Employee 2308 Auiles, Gilbert D							
Section Employee - Demographics							
Record Identifier 2308 Auiles, Gilbert D							
2131 - Police - Criminal Investigations	Update	Paperless 1095-C	No	Yes	12/1/2017 2:27 PM	NWS	Workforce Administration
Employee 12 Boni, Brianna M							
Section Employee - Demographics							
Record Identifier 12 Boni, Brianna M							
1500 - Human Resources	Update	Paperless 1095-C	No	Yes	12/4/2017 3:02 PM	NWS	Workforce Administration

Run by nws on 01/16/2018 09:07:51 AM Page 1 of 1

Employee Information Report

Human Resources > Reports > Employee Reports > Employee Information Report

Paperless W-2 and 1095-C statuses have been added to the **Employee Information Report**.



Employee Information Report

Effective 01/16/18

Sort by Employee

Employee	Status	Department	Title	Benefit Group
3374 Abdullai, Kayla L	Active	Police - Patrol Operations	21-045 - Police Officer	Sworn Police
PERSONAL - Demographics				
Social Security #	582-00-4593	Marital Status	Single	
Date of Birth	10/14/1994	Light Duty	☒ 08/19/2016	
Date of Death		Disabled	☒	
Gender	Female	Pension Number		
Race	White (Not Hispanic or Latino)	Vendor		
Paperless 1095-C	☒	Paperless W-2	☒	
Veteran Information		Citizenship		
Veteran Status		US Citizen	☒	
Military Branch		Registration Number		
Disabled Veteran	☒	Work To Date		
		Admission Number		
120 Abundiz, Ebony R	Active	NCS	51-034 - Animal Control Officer	Regular Full Time Non-Exempt
PERSONAL - Demographics				
Social Security #	127-00-9771	Marital Status	Married	
Date of Birth	08/26/1961	Light Duty	☒	
Date of Death		Disabled	☒	
Gender	Male	Pension Number	Y	
Race	White (Not Hispanic or Latino)	Vendor		
Paperless 1095-C	☒	Paperless W-2	☒	
Veteran Information		Citizenship		
Veteran Status		US Citizen	☒	
Military Branch		Registration Number		
Disabled Veteran	☒	Work To Date		
		Admission Number		

Employee Pay Rate Report

Human Resources > Reports > Employee Reports > Employee Pay Rate Report

On the **Employee Pay Rate Report** page, an **Employee** option has been added to the *Select by* drop-down, and an *Employee* field has been added to the page to let you run the report for one employee.

 **new world** 
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

New World City

Employee Pay Rate Report

Load Saved Report Distribution Group Email Group

Override Report Title

Effective Date Select By

Proposed Increase Sort By

Number of Decimal Places Employee

Proposed Rate on Base Only ☐ Include Longevity ☐

Include Special Assignment ☐

Include Certification ☐

Departments | Benefit Groups | Pay Types

Available Items: 3
Salary
Hourly
Annual

Selected Items: 0

Selecting the **Employee** option enables the *Employee* field.

Employee Position Report

Human Resources > Reports > Position Control > Employee Position Report

An **Employee Status** multi-select list box tab has been added to the **Employee Position Report** page to let you view positions that are tied to active employees, inactive employees or both.

Employee Position Report

Load Saved Report Distribution Group 
 Override Report Title Email Group

As Of Date 
 Sort By
 Position Status

Departments **Employee Status**

Available Employee Status: 2

Selected Employee Status: 0

An *Employee Status* column has been added to the Employee Position Report **output**.

Employee Position Report					
As of 02/06/18 Sort by Department					
Department	Position	Employee	Primary Job	FTE	Employee Status
1500 - Human Resources	15-003 Benefits Manager	2292 Rudisall, Jacey A	Yes	1.00	Active
	15-009 Human Resources Coordinator	1138 Poor, Neil L	Yes	1.00	Inactive
	15-001 Human Resources Director	12 Zurich, Amari M	Yes	1.00	Active
	15-004 Human Resources Specialist	2000 Curo, Octavio E	No	1.00	Active
	15-004 Human Resources Specialist	3815 Hollingshead, Annabelle L	Yes	1.00	Active
	15-006 Intern	3845 Grief, Regan	Yes	1.00	Active
	15-007 Intern	3885 Placencia, Stuart C	Yes	1.00	Active
	15-008 Intern	3559 Maheux, Addison A	Yes	1.00	Active
	15-012 Intern	Unassigned	No		
	78-451 Jms PO Position	Unassigned	No		
	15-011 Office Assistant I	Unassigned	No		
	15-005 Office Associate	2346 Zemke, Kacey L	Yes	1.00	Active
	15-010 Office Associate	3183 Halford, Ariel S	Yes	1.00	Active
	15-002 Safety / Risk Manager	997 Hutt, Yasmineen A	Yes	1.00	Inactive
	15-002 Safety / Risk Manager	3250 Portera, Jennifer	Yes	1.00	Inactive
	15-999 Volunteers	Unassigned	No		
Total - 14					
2136 - Police - Patrol Operations	21-079 Police Officer	3916 Canard, Trey	Yes	1.00	Active
	21-079 Police Officer	3877 Gileland, Kathleen G	Yes	1.00	Active
	21-079 Police Officer	123456789 Guardian, Feldar	Yes	1.00	Inactive
	21-079 Police Officer	1415 Malkowski, Lily A	No	1.00	Active
	21-079 Police Officer	835 Rudinger, Norma	No	1.00	Inactive
	02-017 2017 Riders	3914 Dungey, Ryan	Yes	1.00	Active
	21-024 Adv Police Officer	1415 Malkowski, Lily A	No	1.00	Active
	21-024 Adv Police Officer	3181 Vosmas, Katie P	Yes	1.00	Active
	21-028 Adv Police Officer	3099 Shimsky, Francisco R Jr	Yes	1.00	Active
	21-029 Adv Police Officer	2737 Perricone, Alejandra L	Yes	1.00	Active
	21-029 Adv Police Officer	3700 QQKeye, Vanessa J	No	1.00	Active

Hours Analysis Report

Human Resources > Reports > Management Reports > Hours Analysis Report

Summary-Employee-Excel and **Detail-Employee-Excel** options have been added to the *Report Type* drop-down on the **Hours Analysis Report** page.

 myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Hours Analysis Report

Load Saved Report Distribution Group 

Override Report Title Email Group

From Work Date To Work Date

Include Comments ☐ Include Unposted Batches ☐ Unused Hours Only ☐

Include if Hours Worked Is Greater than 0.0000

Report Type Based On Select By Employee

Available Hour Code(s): 149
 % of Pay - Pen - % of Pay - Pen
 1883 TEST - 1883 PO Test JS
 3% LONGEVITY - 3% LONGEVITY
 Admin Leave - Administrative Leave
 Admin Leave P/T - Administrative Leave P/T
 Admin OT - Admin Leave OT
 App Day OT - Appreciation Day OT Rate
 Appr Day Payout - Appreciation Day Payout
 Appr Day Used - Appreciation Day Used
 Appreciation Day - Appreciation Day Earned
 Auto Benefit - Taxable Vehicle Usage
 Bonus - Fire OT - Bonus Used - Fire OT

Selected Hour Code(s): 0

Selecting either option generates an Excel spreadsheet that is sent to myReports.

If the *Report Type* is **Summary-Employee-Excel** and *Select by* is **Primary Department**, the data sorts by primary department, followed by benefit group and employee. If *Select by* is **Benefit Group**, the data sorts by benefit group, followed by primary department and employee. The rest of the data--hours, days and gross--follows.

Sample Summary-Employee-Excel with Select by Primary Department

Department	Benefit Group	Employee Number	Name	Work Date Weekday	Hours Code	Hours	Days	Gross Reason Code	Comments
1200 Administration	Reg F/T NE	2085	Acal, Maggie K			79.00	9.88	1,593.88	
1200 Administration	Reg F/T E	5338	BBB, Lucy W			91.50	11.44	2,181.00	
1200 Administration	Reg F/T E	5434	Breinstein, Ebony A			157.75	19.73	4,992.77	
1200 Administration	Reg F/T NE	5456	Domin, Brian D			80.00	10.00	1,618.80	
1400 Finance	Reg F/T NE	5716	Balluch, Mason N			94.00	11.75	1,545.33	
1400 Finance	Reg F/T NE	5288	Belback, Phoenix J			194.25	24.29	3,205.16	
1400 Finance	P/T 20 hr	2192	Fambro, Kenya S			6.50	1.63	66.10	
1400 Finance	Reg F/T E	5160	Glaesowski, Ernest B			108.75	13.59	6,198.22	
1500 Human Resources	Reg F/T NE	5183	Hallford, Ariel S			152.00	19.00	2,096.16	
1500 Human Resources	Reg F/T NE	3815	Hollingshead, Annabelle L			7.50	0.94	137.08	
1500 Human Resources	Reg F/T E	597	Hutt, Yasmeen A			92.00	11.50	3,399.87	
1500 Human Resources	Reg F/T E	5138	Poor, Neil L			27.25	3.41	612.83	
1500 Human Resources	Reg F/T E	5292	Rudiani, Jacey A			91.25	11.41	2,593.91	
1500 Human Resources	Reg F/T NE	5346	Zemke, Kacey L			144.00	18.00	2,062.94	
1500 Human Resources	Reg F/T E	512	Zuclich, Amari M			23.75	2.97	1,146.11	
1600 Legal	Reg F/T E	2000	Curo, Octavio E			47.00	5.88	2,802.49	
1600 Legal	Reg F/T NE	2001	McGhaney, Cassandra M			125.50	15.69	3,003.43	

Sample Summary-Employee-Excel with Select by Benefit Group

Department	Benefit Group	Employee Number	Name	Work Date	Weekday	Hours Code	Hours	Days	Gross	Reason Code	Comments
2221 Fire - Suppression	Fire A Shift	5594	Callar, Grady T				264.00	11.00	3,476.29		
2221 Fire - Suppression	Fire A Shift	2809	Cassens, Silas A				351.00	14.63	5,160.20		
2221 Fire - Suppression	Fire A Shift	2296	Valle, Terrance P				192.00	8.00	3,480.81		
2221 Fire - Suppression	Fire B Shift	1698	Ahmed, Gracie B				331.00	13.80	7,088.58		
2221 Fire - Suppression	Fire B Shift	2046	Benzango, Darby G				144.00	6.00	3,246.91		
1400 Finance	P/T 20 hr	2192	Fambro, Kenya S				6.50	1.63	66.10		
4311 Parks - Athletics	P/T No Accruals	5489	Teti, Abraham A				128.25	166.65	0.00		
4311 Parks - Athletics	P/T No Accruals	2337	Vancise, Darren W				124.50	161.77	0.00		
4311 Parks - Athletics	P/T No Accruals	560	Whiteaker, Rachael				960.00	1,247.40	0.00		
11 Administration	Reg F/T E	271	Achtenhof, Abbey T				135.75	16.97	6,793.27		
3113 PW - Planning & Design	Reg F/T E	1643	Barretta, Davis A				85.00	10.62	3,226.48		
1200 Administration	Reg F/T E	3338	BBB, Lucy W				91.50	11.44	2,161.00		
4222 Parks - Aquatics	Reg F/T E	564	Bienkowski, Tiffany W				65.75	8.21	1,762.15		
1200 Administration	Reg F/T E	5434	Breitenstein, Ebony A				157.75	19.73	4,992.77		

If the *Report Type* is **Detail-Summary-Excel**, the data sorts the same as it does for the summary report and includes work dates, weekdays, hours codes, hours, days and gross.

Sample Detail-Employee-Excel with Select by Primary Department

Department	Benefit Group	Employee Number	Name	Work Date	Weekday	Hours Code	Hours	Days	Gross	Reason Code	Comments
1200 Administration	Reg F/T NE	2085	Acal, Maggie K	01/14/2016	Thursday	Sick Used Full Time	1.00	0.13	20.15		
1200 Administration	Reg F/T NE	2085	Acal, Maggie K	01/26/2016	Tuesday	Sick Used Full Time	1.00	0.13	20.15		
1200 Administration	Reg F/T E	5338	BBB, Lucy W	01/13/2016	Wednesday	Vacation Used Full Time	3.25	0.41	76.31		
1200 Administration	Reg F/T E	2434	Breitenstein, Ebony A	01/08/2016	Friday	Comp Time Used Full Time	1.50	0.19	47.19		
1200 Administration	Reg F/T E	2434	Breitenstein, Ebony A	01/20/2016	Wednesday	Time	0.75	0.09	23.60		
1200 Administration	Reg F/T E	2434	Breitenstein, Ebony A	01/29/2016	Friday	Comp Time Used Full Time	2.75	0.34	86.53		
1200 Administration	Reg F/T NE	2456	Domin, Brian D	01/06/2016	Wednesday	Sick Used Full Time	1.25	0.16	25.19		
1200 Administration	Reg F/T NE	2456	Domin, Brian D	01/07/2016	Thursday	Sick Used Full Time	8.00	1.00	161.23		
1400 Finance	Reg F/T NE	3716	Balluch, Mason N	01/19/2016	Tuesday	Sick Used Full Time	7.00	0.88	113.78		
1400 Finance	Reg F/T NE	2288	Bellock, Phoenix J	01/15/2016	Thursday	Vacation Used Full Time	4.00	0.50	65.88		
1400 Finance	Reg F/T NE	2288	Bellock, Phoenix J	01/20/2016	Wednesday	Vacation Used Full Time	6.50	0.81	107.06		
1400 Finance	Reg F/T NE	2633	Blunkall, Raheem J	01/04/2016	Monday	Sick Used Full Time	0.75	0.09	13.65		
1400 Finance	Reg F/T NE	2633	Blunkall, Raheem J	01/08/2016	Friday	Vacation Used Full Time	0.50	0.06	9.10		
1400 Finance	Reg F/T NE	2633	Blunkall, Raheem J	01/12/2016	Tuesday	Sick Used Full Time	3.00	0.38	54.61		
1400 Finance	Reg F/T NE	2633	Blunkall, Raheem J	01/14/2016	Thursday	Vacation Used Full Time	4.25	0.53	77.37		
1400 Finance	Reg F/T NE	2633	Blunkall, Raheem J	01/20/2016	Wednesday	Vacation Used Full Time	0.25	0.03	4.55		
1400 Finance	Reg F/T NE	2633	Blunkall, Raheem J	01/29/2016	Friday	Vacation Used Full Time	0.50	0.06	9.10		
1400 Finance	Reg F/T NE	23	Chino, Belen G	01/20/2016	Wednesday	Personal Time Used	6.50	0.81	140.31		
1400 Finance	Reg F/T NE	2661	Degnim, Porter A	01/07/2016	Thursday	Vacation Used Full Time	0.25	0.03	4.15		
1400 Finance	Reg F/T NE	2661	Degnim, Porter A	01/08/2016	Friday	Vacation Used Full Time	8.00	1.00	132.68		
1400 Finance	Reg F/T NE	2661	Degnim, Porter A	01/21/2016	Thursday	Vacation Used Full Time	8.00	1.00	132.68		
1400 Finance	Reg F/T NE	2661	Degnim, Porter A	01/29/2016	Friday	Vacation Used Full Time	7.75	0.97	128.53		

Sample Detail-Employee-Excel with Select by Benefit Group

Department	Benefit Group	Employee Number	Name	Work Date	Weekday	Hours Code	Hours	Days	Gross	Reason Code	Comments
2221 Fire - Suppression	Fire A Shift	5594	Callar, Grady T	01/04/2016	Monday	Holiday Time Used	24.00	1.00	284.50		
2221 Fire - Suppression	Fire A Shift	5594	Callar, Grady T	01/07/2016	Thursday	Holiday Fire OT Rate	8.00	0.33	142.45		
2221 Fire - Suppression	Fire A Shift	5594	Callar, Grady T	01/07/2016	Thursday	Holiday Time Used	16.00	0.67	189.93		
2221 Fire - Suppression	Fire A Shift	5594	Callar, Grady T	01/13/2016	Wednesday	Holiday Fire OT Rate	8.00	0.33	142.45		
2221 Fire - Suppression	Fire A Shift	5594	Callar, Grady T	01/13/2016	Wednesday	Holiday Time Used	16.00	0.67	189.93		
2221 Fire - Suppression	Fire A Shift	2809	Cassens, Silas A	01/19/2016	Tuesday	Comp Time Used Full Time	12.00	0.50	159.96		
2221 Fire - Suppression	Fire A Shift	2809	Cassens, Silas A	01/19/2016	Tuesday	Personal Time Used	12.00	0.50	159.96		
2221 Fire - Suppression	Fire B Shift	1698	Ahmed, Gracie B	01/02/2016	Saturday	Holiday Fire OT Rate	12.00	0.50	348.11		
2221 Fire - Suppression	Fire B Shift	1698	Ahmed, Gracie B	01/11/2016	Monday	Holiday Time Used	24.00	1.00	464.16		
2221 Fire - Suppression	Fire B Shift	2479	Brott, Chaim J	01/20/2016	Wednesday	Sick Used Full Time	16.00	0.67	249.66		
2221 Fire - Suppression	Fire B Shift	2479	Brott, Chaim J	01/20/2016	Wednesday	Sick Time at Overtime					
2221 Fire - Suppression	Fire B Shift	2479	Brott, Chaim J	01/20/2016	Wednesday	Rate	8.00	0.33	187.24		
2221 Fire - Suppression	Fire B Shift	5597	Carriedo, Nickolas	01/29/2016	Friday	Holiday Fire OT Rate	8.00	0.33	142.45		
2221 Fire - Suppression	Fire B Shift	5597	Carriedo, Nickolas	01/29/2016	Friday	Holiday Time Used	16.00	0.67	189.93		
4311 Parks - Athletics	P/T No Accruals	5489	Teti, Abraham A	01/01/2016	Friday	Sick Used Full Time	128.25	763.39	0.00		
4311 Parks - Athletics	P/T No Accruals	2337	Vancise, Darren W	01/01/2016	Friday	Sick Used Full Time	124.50	741.07	0.00		
4311 Parks - Athletics	P/T No Accruals	560	Whiteaker, Rachael	01/01/2016	Friday	Sick Used Full Time	960.00	5,714.29	0.00		

The Excel formats do not include totals. The spreadsheet is intended to be a flat file of the data so you may sort and total the data as needed.

The Hours Analysis Report also has been updated so that when it is run with a *Report Type* of **Summary-Employee-Hours Code** and a *Select By* of **Benefit Group**, the summary sections on the **output** are named **Benefit Group Summary**, and all totals are reflected accurately.

Hours Analysis Report					
Work Date 01/01/16 - 12/31/17					
Sort by Benefit Group - Employee					
Report Type Summary - Employee - Hours Code					
Employee		Hours	Days	Gross	
2803 Nush, Wesley W		16.0000	.67	213.29	
	Employee Summary	Hours Code	Hours	Days	Gross
		Regular Full Time	16.0000	.67	213.29
3115 Topia, Carmen A		9.0000	.38	102.51	
	Employee Summary	Hours Code	Hours	Days	Gross
		Regular Full Time	9.0000	.38	102.51
Benefit Group Fire C Shift Totals Employees 5		61.5000	2.57	874.66	
	Benefit Group Summary	Hours Code	Hours	Days	Gross
		Regular Full Time	65.5000	2.74	953.06
Benefit Group Reg F/T NE		7.0000	.88	178.12	
3049 Carolla, Tori R					
	Employee Summary	Hours Code	Hours	Days	Gross
		Regular Full Time	7.0000	.88	178.12
Benefit Group Reg F/T NE Totals Employees 1		7.0000	.88	178.12	
	Benefit Group Summary	Hours Code	Hours	Days	Gross
		Regular Full Time	7.0000	.88	178.12
Grand Total Employees 12		296.0000	12.92	10,065.09	
	Final Summary	Hours Code	Hours	Days	Gross
		Reg ALL	200.0000	8.33	8,644.53
		Regular Full Time	103.0000	4.89	1,563.94

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Page 2 of 2

State Requirements

Alabama RSA Report

Human Resources > State Requirements > AL > RSA Report

The **RSA Report** has been added to the Alabama State Requirements menu. Use this option to submit retirement data for a range of check dates to the Retirement System of Alabama.

Alabama RSA Report

Load Saved Report		Distribution Group		
Override Report Title		Email Group		

From Check Date		
To Check Date		
Format	Enrollment	

Submit
Save
Save As
Delete
Settings

The RSA Report replaces the Alabama ERS and RSA-1 reports. Contributions data from ERS and RSA-1 reporting is included in the RSA report and transmittal files.

Find details in the [Alabama RSA Reporting Guide](#).

Alaska PERS and SBS Reports

Setup

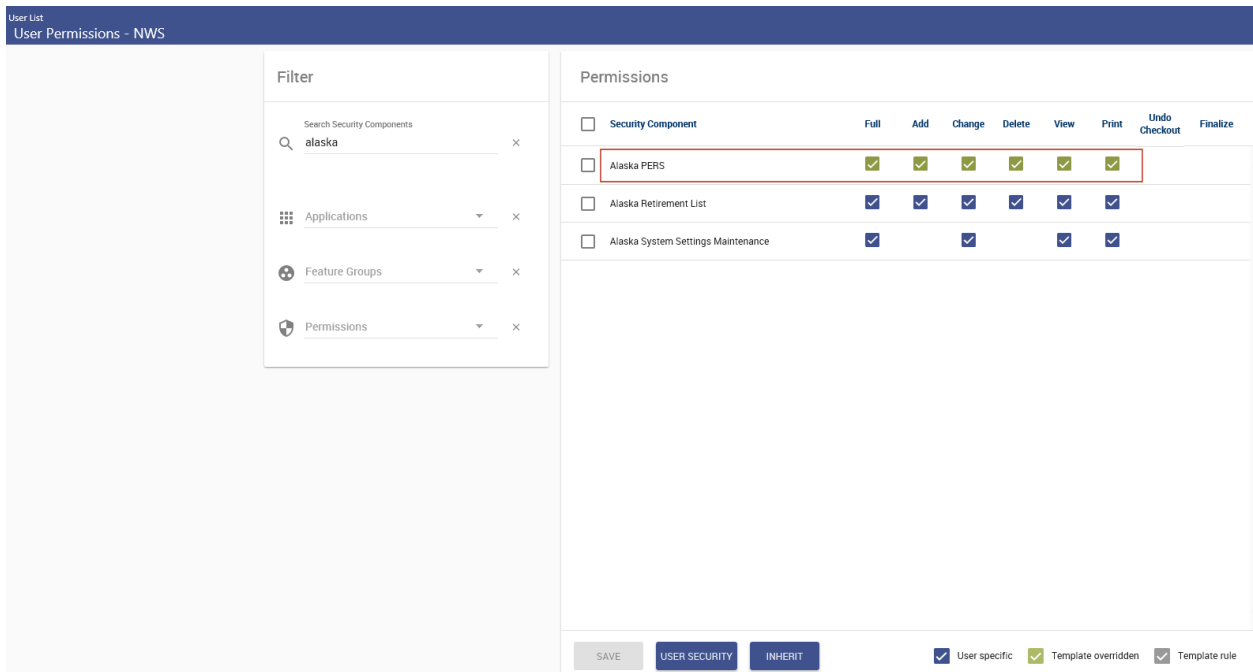
Alaska PERS

The Alaska PERS Report requires the setup of user permissions, three user-defined fields (UDFs) on the Workforce Administration **Employment** tab, one UDF on the Deduction page in Maintenance and one UDF on the Benefit page in Maintenance.

The UDFs accommodate employee contributions made through payroll deductions and employer contributions made through benefits.

User Permissions

1. Navigate to Maintenance > Logos Suite > Security > Users.
2. Select the user.
3. Click the **Permissions** button. The User Permissions page will open.
4. In the *Search Security Components* field, type **Alaska PERS Report** or any part of the name, such as **alaska** (entry is not case sensitive).
5. The grid will refresh to show a row containing the **Alaska PERS Report component**.



6. Select each function to which the user should have access.
7. Click **SAVE** to retain the settings. The new permissions will take effect once the user has logged off and back onto the system.

Validation Sets

Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List

The following validation sets are used in Alaska PERS reporting:

Set Number	Name
580	Alaska PERS Contribution Type (new)
581	Alaska PERS Basis Type (new)
582	Alaska PERS Service Type (new)
583	AK Plan Code (existing)
584	AK PERS Occupational Code (existing)
585	Alaska PERS Event Type (new)

Employment UDFs

The following UDFs need to be added to the Workforce Administration **Employment** tab:

Record Type	Name	Data Type
Employee Employment	AKPlanCOde	Validation Set 583
Employee Employment	AKPersonnelStatusCode	Text
Employee Employment	AKPERSOccupationalCode	Validation Set 584

1. Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Employee Employment** from the *Record Type* drop-down.
3. Select **Attributes** from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined employee fields.
4. Click **New**. The User-Defined Fields dialog will open.
5. Complete the fields exactly as shown in the following table:

Field	Value
Name	AKPlanCode
Section Header	(leave blank)
Sequence Number	(your choice or leave blank)
Data Type	Validation Set
Validation Set	AKPlanCode
Required	(leave unchecked)

(The steps to set up valid entries for the *AKPlanCode* UDF are provided in the next section, [Validation Set Values Setup](#).)

6. Click **OK**.

Repeat steps 4 through 6 for the two remaining UDFs that need to be set up. The following tables contain the entries you need to make:

Field	Value
Name	AKPersonnelStatusCode
Section Header	(leave blank)
Sequence Number	(your choice or leave blank)
Data Type	Text

Field	Value
<i>Maximum Length</i>	1
<i>Required</i>	(leave unchecked)

Field	Value
<i>Name</i>	AKPERSOccupationalCode
<i>Section Header</i>	(leave blank)
<i>Sequence Number</i>	(your choice or leave blank)
<i>Data Type</i>	Validation Set
<i>Validation Set</i>	AKPERSOccupationalCode
<i>Required</i>	(leave unchecked)

Valid entries in the *AKPersonnelStatusCode* UDF are as follows: **F** (Full Time), **P** (Part Time), **W** (Workers' Compensation Time).

The steps to set up valid entries for the *AKPERSOccupationalCode* UDF are provided in the next section, [Validation Set Values Setup](#).

When you are finished, the Employee Employment attributes grid on the User-Defined Fields List page should contain rows for the UDFs created.

Validation Set Values Setup

To comply with the formatting requirements of the state transmittal file, values in the *AKPlanCode* and *AKPERSOccupationalCode* UDFs must be expressed precisely; the validation sets for these fields, therefore, must have values set up for use by the Alaska PERS Report.

To set up validation set values for the *AKPlanCode* UDF, follow these steps:

1. Navigate to Maintenance > Logos Suite > System > Validation Sets > Validation Set List.
2. Highlight the validation set, **AKPlanCode** (60000).
3. Click **Values**. The Validation Set Values List page for *AKPlanCode* will open.
4. Click **New**. The Validation Set Value page will open.
5. In the *Value* field, type **DB**.
6. In the *Description* field, type **DB**.



Note: The transmittal file will use the value to identify the plan code information being sent to the state; therefore, take care to enter each value exactly as shown in these instructions.

- Click **Save/New**. Your entries will be saved and cleared, and the Validation Set Value page will remain open for the entry of a new value.

Repeat steps 5 through 7 for the remaining validation set value that needs to be set up, typing **DC** in step 5, **DC** in step 6 and clicking **Save** in step 7. When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved.

To set up validation set values for the *AKPERSOccupationalCode* UDF, follow these steps:

- Navigate to Maintenance > Logos Suite > System > Validation Sets > Validation Set List.
- Highlight the validation set, **AKPERSOccupationalCode** (60002).
- Click **Values**. The Validation Set Values List page for *AKPERSOccupationalCode* will open.
- Click **New**. The Validation Set Value page will open.
- In the *Value* field, type **A**.
- In the *Description* field, type **All Others in PERS**.



Note: The transmittal file will use the value to identify the plan code information being sent to the state; therefore, take care to enter each value exactly as shown in these instructions.

- Click **Save/New**. Your entries will be saved and cleared, and the Validation Set Value page will remain open for the entry of a new value.

Repeat steps 5 through 7 for the remaining validation set values that need to be set up, clicking **Save** after making entries for the final value. Type each *Value* exactly as shown in the left column of the table below:

Value	Description
C	<i>Inland Boatman Union in PERS</i>
E	<i>Elected Officials in PERS/EPORS Members in EPORS</i>

Value	Description
<i>F</i>	<i>Firemen in PERS</i>
<i>J</i>	<i>Non-Contributing Judges in JRS</i>
<i>L</i>	<i>TRS Legislator in TRS</i>
<i>M</i>	<i>Marine, Mates, Pilots in PERS</i>
<i>P</i>	<i>Peace Officer in PERS</i>
<i>R</i>	<i>Contributing Judges in JRS</i>
<i>T</i>	<i>Teachers in TRS</i>

When you are finished, the grid on the Validation Set Values List page should contain a row for each value you have saved.

Employee Setup for Alaska PERS Reporting

To set up an employee for Alaska PERS reporting, follow these steps:

1. Navigate to Human Resources > Workforce Administration > Search (Human Resources > Employee Maintenance if you are using Employee Maintenance).
2. Use the search controls to produce a list of employees.
3. Click the *Employee Number* link for the employee you want to set up for retirement reporting. The Employee's page will open.
4. Click the **Employment** tab. The tab will show existing user-defined fields, including the **PERS UDFs** you set up:

Employee Search
Curl, Luz R (4568)

04/24/2008

Personal Employment Jobs Payroll Data Employer Reporting

Save Cancel Employment

Effective Date 04/24/2008

Status Information

Status Active
Status Event
Event Reason
Employment Type On Call Responder
Employment Class
EEOC On Call Responder
Company
1099

Comments

Date Selection

Hire Date 04/24/2008
Benefit Date 04/24/2008
Accrual Date 04/24/2008
Seniority Date 04/24/2008
Seniority Rank
Termination Date
IMP Start Date

User Defined Fields

AK PERS Event
AKESCAreaCode 61
AKESCOccupationCod 33-2011
AKPERSOccupationalC
AKPersonnelStatusCo
AKPlanCode
AKWOPEndDate
AKWOPStartDate
Employee Job Title 0100 Volunteer
PERS Enrollment Date
Standard Occ Code 33-2011 Firefighters, EMS, Rescue
State Tax ID

5. Make valid selections in the appropriate UDFs.

6. Click **Save**.

Repeat these steps for each employee who is to be included in the report.

Deduction and Benefit UDF

The UDF *AKPERS* needs to be added to the Deduction and Benefit pages in Maintenance:

1. Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Deduction** from the *Record Type* dropdown.
3. Select **Attributes** from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined deduction fields.
4. Click **New**. The User-Defined Fields dialog will open.
5. Complete the fields exactly as shown in the following table:

Field	Value
Name	AKPERS
Section Header	<i>(leave blank)</i>
Sequence Number	<i>(your choice or leave blank)</i>
Data Type	Text
Maximum Length	2
Required	<i>(leave unchecked)</i>

6. Click **OK**.

Repeat steps 2 through 6 to set up the Benefit UDF, substituting **Benefit** for **Deduction** in step 2, and selecting **4** for the *Maximum Length* in step 5.

When you are finished, the Deduction and Benefit attribute grids on the User-Defined Fields List page each should contain a row for the *AKPERS* UDF.

Valid entries in the *AKPERS* Deduction UDF are as follows:

Value	Description
AO	<i>Additional Post Tax</i>
AR	<i>Additional Pre Tax</i>
C	<i>Contribution</i>
IO	<i>In-Debt Payments Post Tax</i>
IP	<i>In-Debt Payments Pre Tax</i>
V	<i>Voluntary</i>

Valid entries in the *AKPERS* Benefit UDF are as follows:

Value	Description
C	<i>Contribution</i>
DBUL	<i>DBUL</i>
HRA	<i>HRA</i>
ODD	<i>ODD</i>
RM	<i>Retiree Medical</i>

Assign User-Defined Deductions and Benefits

To assign user-defined deductions, follow these steps:

1. Navigate to Maintenance > Human Resources > Deductions and Benefits > Deductions. The Deduction List page will open.
2. Select (highlight) a deduction.
3. Click the **User-Defined Fields** button. The Deduction Code User-Defined Fields page will open.
4. Make a valid entry in the **deduction UDF** you set up:



new world[™]
myFavorites | Financial Management | Human Resources | Maintenance

Deduction List
Deduction Code User Defined Fields - AFLAC

2004W2Box10

2004W2Box12

2004W2Box14

AKPERS

AKSBSAdditional ☐

AKSBSAnnuity ☐

Exclude From AK ESC ☒

Save Reset

Repeat these steps to assign user-defined benefits, using Maintenance > Human Resources > Deductions and Benefits > Benefits as the path in step 1.

Alaska SBS

The Alaska SBS Report requires the setup of user permissions, two user-defined fields (UDFs) on the Workforce Administration **Employment** tab, two UDFs on the Deduction page in Maintenance and three UDFs on the Benefit page in Maintenance.

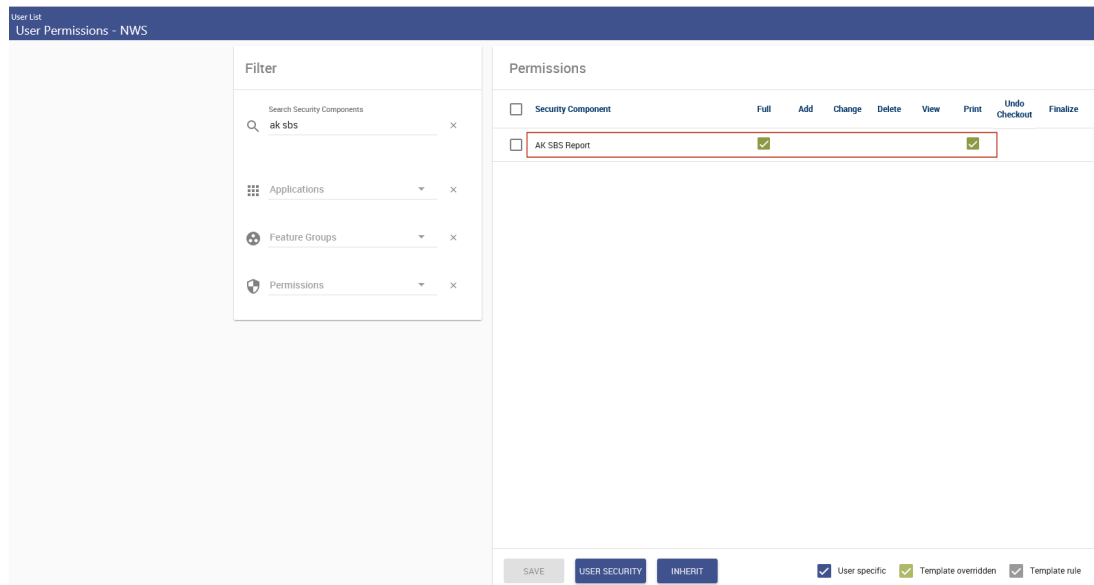
The UDFs accommodate employee contributions made through payroll deductions and employer contributions made through benefits.

User Permissions

1. Navigate to Maintenance > Logos Suite > Security > Users.

2. Select the user.
3. Click the **Permissions** button. The User Permissions page will open.
4. In the *Search Security Components* field, type **AK SBS Report** or any part of the name, such as **ak sbs** (entry is not case sensitive).

The grid will refresh to show a row containing the **Alaska SBS Report component**.



5. Select the **Print** function.
6. Click **Save** to retain the setting. The new permission will take effect once the user has logged off and back onto the system.

Employment UDFs

The following UDFs need to be added to the Workforce Administration **Employment** tab:

Record Type	Name	Data Type
<i>Employee Employment</i>	AKWOPStartDate	Date
<i>Employee Employment</i>	AKWOPEndDate	Date

1. Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Employee Employment** from the *Record Type* dropdown.
3. Select **Attributes** from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined employee fields.
4. Click **New**. The User-Defined Fields dialog will open.

5. Complete the fields exactly as shown in the following table:

Field	Value
Name	AKWOPStartDate
Section Header	(leave blank)
Sequence Number	(your choice or leave blank)
Data Type	Date
Required	(leave unchecked)

6. Click **OK**.

Repeat steps 4 through 6 for the remaining UDF that needs to be set up. The following table contains the entries you need to make:

Field	Value
Name	AKWOPEndDate
Section Header	(leave blank)
Sequence Number	(your choice or leave blank)
Data Type	Date
Required	(leave unchecked)

When you are finished, the Employee Employment attributes grid on the User-Defined Fields List page should contain rows for the UDFs created.

Deduction UDFs

The following UDFs need to be added to the Deduction page in Maintenance:

Record Type	Name	Data Type
Deduction	AKSBSAnnuity	Check Box
Deduction	AKSBSAdditional	Check Box

1. Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select **Deduction** from the *Record Type* dropdown.
3. Select **Attributes** from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined deduction fields.

- Click **New**. The User-Defined Fields dialog will open.

Complete the fields exactly as shown in the following table:

Field	Value
Name	AKSBSAnnuity
Section Header	(leave blank)
Sequence Number	(your choice or leave blank)
Data Type	Check Box
Required	(leave unchecked)

- Click **OK**.

Repeat steps 4 through 6 for the remaining UDF that needs to be set up. The following table contains the entries you need to make:

Field	Value
Name	AKSBSAdditional
Section Header	(leave blank)
Sequence Number	(your choice or leave blank)
Data Type	Check Box
Required	(leave unchecked)

-

When you are finished, the Deduction attribute grid on the User-Defined Fields List page should contain rows for the *AKSBSAnnuity* and *AKSBSAdditional* UDFs.

Benefit UDFs

The following UDFs need to be added to the Benefit page in Maintenance:

Record Type	Name	Data Type
<i>Benefit</i>	AKSBSPremium	Check Box
<i>Benefit</i>	AKSBESAdjustment	Check Box
<i>Benefit</i>	AKSBSAnnuity	Check Box

- Navigate to Maintenance > Logos Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
- Select **Benefit** from the *Record Type* dropdown.

3. Select **Attributes** from the *Maintenance Type* dropdown. The page will be refreshed to show a grid of existing user-defined benefit fields.
4. Click **New**. The User-Defined Fields dialog will open.

Complete the fields exactly as shown in the following table:

Field	Value
<i>Name</i>	AKSBSPremium
<i>Section Header</i>	(leave blank)
<i>Sequence Number</i>	(your choice or leave blank)
<i>Data Type</i>	Check Box
<i>Required</i>	(leave unchecked)

5. Click **OK**.

Repeat steps 4 through 6 for the remaining UDFs that need to be set up. The following tables contain the entries you need to make:

Field	Value
<i>Name</i>	AKSBSAdjustment
<i>Section Header</i>	(leave blank)
<i>Sequence Number</i>	(your choice or leave blank)
<i>Data Type</i>	Check Box
<i>Required</i>	(leave unchecked)

Field	Value
<i>Name</i>	AKSBSAnnuity
<i>Section Header</i>	(leave blank)
<i>Sequence Number</i>	(your choice or leave blank)
<i>Data Type</i>	Check Box
<i>Required</i>	(leave unchecked)

When you are finished, the Benefit attribute grid on the User-Defined Fields List page should contain rows for the *AKSBSPremium*, *AKSBAdjustment* and *AKSBAnnuity* UDFs.



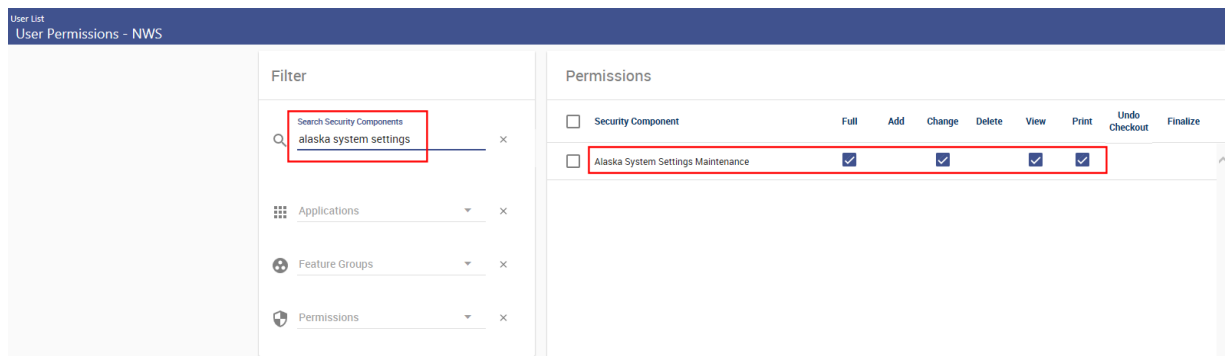
Note: To set up employees, deductions and benefits for ESC reporting, follow the guidelines in the preceding “Employee Setup for Alaska PERS Reporting” and “Assign User-Defined Deductions and Benefits” sections.

System Settings Maintenance

Human Resources > State Requirements > AK > System Settings Maintenance



Note: For this option to be available on the Alaska State Requirements menu, permission to the **Alaska System Settings Maintenance security component** is needed.



The screenshot shows the 'User Permissions - NWS' page. On the left, there is a 'Filter' section with a search bar containing 'alaska system settings'. Below the search bar are filters for Applications, Feature Groups, and Permissions. On the right, the 'Permissions' table is displayed. The table has columns for Security Component, Full, Add, Change, Delete, View, Print, Undo Checkout, and Finalize. The row for 'Alaska System Settings Maintenance' is highlighted with a red box, and all its permission checkboxes are checked.

Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
Alaska System Settings Maintenance	☒	☒	☒	☒	☒	☒	☒	☒

Use the Alaska System Settings Maintenance page to perform the additional setup needed to create retirement data for the Alaska PERS and SBS reports. The setup includes employer information, leave hours balance, employment changes, events, the benefits and deductions used to calculate employee and employer contributions and the hours codes used to report service hours.



Note: The Alaska PERS and SBS data will go on the same transmittal file.

The page is segmented into three tabs:

Company Settings

Alaska System Settings Maintenance

Company Settings

PERS Settings

SBS Settings

PERS Reporting

Employer ID 456789123

Include In Leave Balance

EXCESS LEAVE


COMP TIME
COMP TIME 56 HR
FLOATING HOLIDAY
PERSONAL LEAVE
PERSONAL LEAVE 56 HR

Available Hours Categories: 1

Selected Hours Categories: 5

Eligible For Employment Reporting

Conversion
Department Change Only
GL Change Only
Multiple Changes
Roster Card Conversion

Non-Primary Job
Pay Rate Change Only
Position Change Only

Available Job Events: 5

Selected Job Events: 3

Events

Employment Status Event	Event Type
Contains...	
Hire - Hire	Hire
In-Voluntary - In-Voluntary	Terminate
Rehire - Rehire	Rehire
Voluntary - Voluntary	Terminate

Save

Reset

Retirement List

PERS Settings

Alaska System Settings Maintenance

Company Settings PERS Settings **SBS Settings**

Deduction Contributions Benefit Contributions Service Types

Deduction	Contribution Type
▽ Contains...	
AFLAC - AFLAC W/H	
AFLAC ATD - AFLAC ATD W/H	
APE2 - APEA/AFT DUES W/H	
APE3 - APEA/AFT HALF-TIME DUES W/H	
APE4 - APEA/AFT HALF-TIME DUES W/H	
APEA - APEA/AFT DUES W/H	
BEDC - SBS BENEFITS - DEP CARE	
BENE - SBS BENEFITS W/H	
DECE - DECEASED	
DEPCARE - EBMS - DEP CARE	
DONA - DONATIONS	
DSST - FICA TAX W/H	
DVHI - ON-CALL HEALTH INS FUNDING	
EPIC - EMP POLITICAL INFO COMMITTEE	
ESBS - SBS W/H	
FED W/H - FED TAX OVERRIDE	

Save Reset Retirement List

SBS Settings

Alaska System Settings Maintenance

Company Settings PERS Settings **SBS Settings**

Deduction Contributions Benefit Contributions Service Types

Deduction	Contribution Type
▽ Contains...	
AFLAC - AFLAC W/H	
AFLAC ATD - AFLAC ATD W/H	
APE2 - APEA/AFT DUES W/H	
APE3 - APEA/AFT HALF-TIME DUES W/H	
APE4 - APEA/AFT HALF-TIME DUES W/H	
APEA - APEA/AFT DUES W/H	
BEDC - SBS BENEFITS - DEP CARE	SBS-VSB-Employee Dependent Care
BENE - SBS BENEFITS W/H	SBS-VSB-Employee Critical Care Insurance High
DECE - DECEASED	
DEPCARE - EBMS - DEP CARE	
DONA - DONATIONS	
DSST - FICA TAX W/H	
DVHI - ON-CALL HEALTH INS FUNDING	
EPIC - EMP POLITICAL INFO COMMITTEE	
ESBS - SBS W/H	SBS-AP-Mandatory Employee
FED W/H - FED TAX OVERRIDE	

Save Reset Retirement List

You may click **Save** after selections have been made on each tab, or you may wait until selections have been made on all tabs.

Company Settings

Field/List Box/Grid	Description
<i>Employer ID</i>	Fill in the 12-digit, state-assigned employer identifier number.
<i>Include in</i>	Employers are required to report employee leave balances. To report

Field/List Box/Grid	Description
<i>Leave Balance</i>	paid time off hours available for an hours category, move the category from the <i>Available Hours Categories</i> list box to the <i>Selected Hours Categories</i> list box.
<i>Eligible for Employment Reporting</i>	Certain changes to an employee's employment record are required to be reported to AK PERS. To report these changes, move the appropriate job events from the <i>Available Job Events</i> list box to the <i>Selected Job Events</i> list box. Selected job events will create an employment record detail during the create process.
<i>Events</i>	Changes to an employee's employment status are required to be reported. Use the Events grid to map your current employment status events to event types the Alaska retirement system has pre-defined as reportable. The <i>Event Type</i> column contains values from validation set 585-Alaska PERS Event Type .

PERS and SBS Settings

Use the **PERS Settings** tab to assign contribution types to deduction and benefit codes and service types to hours codes for PERS reporting. Use the **SBS Settings** tab to do the same for SBS reporting.



Note: If you do not report SBS contributions, you may skip the **SBS Settings** tab.

The *Contribution Type* drop-down will not contain selections for an SBS benefit code that appears on the **PERS Settings** tab; the selections will be available on the **SBS Settings** tab.

The PERS and SBS **Service Types** tabs track the number of reportable hours per pay period. For each applicable hours code on these tabs, assign a corresponding *Service Type* that determines whether the hours are paid hours; for example, any hours that belong to a leave-without-pay hours code (**LWOP Hours**) will not be counted towards retirement.

Alaska System Settings Maintenance

Company Settings **PERS Settings** SBS Settings

Deduction Contributions Benefit Contributions **Service Types**

Hours	Service Type
▽ Contains...	
ABC - PERSONAL LV-BLDG CASH IN	
ADM - ADMIN LEAVE (HOURLY)	
ADO - ADMIN LEAVE (ON-CALL)	
ADS - ADMIN LEAVE (SALARIED)	
ADT - ADMIN LEAVE (TEMP - PENS)	
ADU - ADMIN LEAVE UNPAID	
AEC - PERSONAL EXCESS CASH-IN	
AES - SAL EXCESS PERSONAL LEAVE	
AEU - PERSONAL LV EXCESS USED	
AIA - PERSONAL LV INSPECT/ADMIN	
ALA - PERSONAL LEAVE ACCRUAL	
ALC - PERSONAL LEAVE CASH-IN	
ALJ - PERSONAL LEAVE CASH-IN (PROJ)	
ALN - PERSONAL LEAVE-NO PAY	
ALO - PERSONAL LEAVE (1,000 HRS.)	
ALP - PERSONAL LEAVE CASH-IN (TEMP)	

Save **Reset** **Retirement List**

To let you move back and forth easily from Alaska System Settings Maintenance to the Alaska Retirement List page, a **Retirement List** button has been added to the Alaska System Settings Maintenance page, and a **Settings** button has been added to the Alaska Retirement List page.

Events

Employment Status Event	Event Type
▽ Contains...	
Hire - Hire	Hire
In-Voluntary - In-Voluntary	Terminate
Rehire - Rehire	Rehire
Voluntary - Voluntary	Terminate

Save **Reset** **Retirement List**

Alaska Retirement List

Employee #	Employee Name
▽ Equals...	▽ Contains...
☐ 5877	Allinger, Greta L
☐ 2706	Rossini, Will M
☐ 56567	Schulte, Jim

1 - 3 of 3 records

Create New Print Delete **Settings** PERS List

Create Alaska PERS and SBS Data

Once you have set up the necessary UDFs and selected the company, PERS and SBS settings in Alaska System Settings Maintenance, you will be ready to create an on-screen work file of retirement system data that will be available for the Alaska PERS and SBS reports. This data may be reviewed and modified before it is transmitted to the state.

To create the work file, follow these steps:

1. Navigate to Human Resources > State Requirements > AK > **Retirement List**.

Alaska Retirement List		
☐	Employee #	Employee Name
	▽ Equals...	▽ Contains...
☐	5877	Allinger, Greta L
☐	1470	Hollenback, Leonard D
☐	3446	Huerto, Carrie J
☐	3625	Lampron, Kent L
☐	2948	Maclain, Christine R
☐	2501	Parmar, Skye S
☐	2706	Rossini, Will M
☐	56567	Schulte, Jim
☐	595	Toldness, Anika R

1 - 9 of 9 records

 Create
  New
  Print
  Delete
  Settings
  PERS List



Note: This page is new. If you want to use the previous version of the retirement list, the **Alaska PERS List**, click the **PERS List** button at the bottom of the page.

Alaska PERS List

Employee

▼

Search

Reset

Name	Plan	Gross	Total	Benefits
⊕ Adamsen, Kourtney M - ...	DB	0	0	0
⊕ Ahmed, Gracie M - 5129	DC	0	0	0
⊕ Ahrendes, Deandre W -...	DC	0	0	0
⊕ Allinger, Greta L - 5877	DB	0	0	0
⊕ Alt, Wayne R - 7393	DC	0	0	0
⊕ Arita, Marquis C - 3929	DC	0	0	0
⊕ Atha, Jaren G - 5727	DC	0	0	0
⊕ Atmore, Travon M - 3455	DB	0	0	0
⊕ Babbs, Jamari S - 5474	DC	0	0	0
⊕ Baile, Allyson R - 1513	DB	210.16	14.19	46.24
⊕ Barretta, Davis D - 2535	DB	0	0	0
⊕ Barschdoor, Clark A - 5...	DC	0	0	0
⊕ Bassani, Ellie - 2033	DB	0	0	0
⊕ Bauchspies, Paloma M ...	DC	0	0	0
⊕ Behan, Naomi B - 7237	DC	0	0	0

Items: 1 - 50 of 306

Create

New

Delete

Refresh

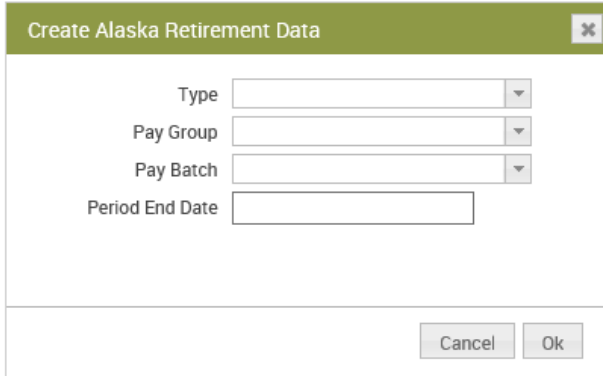
Print

SBS Report

Retirement List

The grid on this page contains retirement data from the last time the work file was created, with each row in the grid corresponding to an employee record. If you are running this process for the first time, the grid will be empty.

2. Click the **Create** button. The **Create Alaska Retirement Data dialog** will open.



The dialog box titled "Create Alaska Retirement Data" contains four input fields: "Type" (a dropdown menu), "Pay Group" (a dropdown menu), "Pay Batch" (a dropdown menu), and "Period End Date" (a text box). At the bottom right, there are "Cancel" and "Ok" buttons.

To accommodate times when a personnel file may need to be created and uploaded to the Alaska Retirement System prior to the upload of a payroll file, personnel and payroll files may be created independently of each other.

3. Select the *Type* of data that will be created: **Personnel Only**, **Payroll Only** or **Personnel and Payroll**.
4. Select the *Pay Group* and *Pay Batch* for which payroll data will be collected. These selections are required when the *Type* is **Payroll Only** or **Personnel and Payroll**. Since each pay batch has a unique identifier, the report is run for one pay group and one pay batch at a time. When the *Type* is **Personnel Only**, leave these fields blank.
5. In the *Period End Date* field, fill in the end date of the 12-month period for which personnel data will be collected. This entry is required when the *Type* is **Personnel Only** or **Personnel and Payroll**. The format must be **MM/DD/YY**, with the forward slashes (/) included. When the type is **Payroll Only**, leave this field blank.



Note: Personnel data always is collected from the last 12 months, while payroll data is collected from the pay group and batch selected.

7. Click **OK** to create the retirement data.

Edit Alaska PERS and SBS Data

Payroll Data

If you need to edit data for an employee, click the hyper-linked *Employee Name*. The Alaska

Retirement Entry page will open. If you need to add an employee to the grid on the Alaska Retirement List page, click the **New** button at the bottom of the page. An Add Employee dialog will open, providing a field for selecting the employee.

The Alaska Retirement Entry page has six tabs that will contain a combination of payroll data and member data.

The data that will be used to create the payroll transmittal file consists of the following:

» Contributions



myFavorites | Financial Management | Human Resources | Maintenance

new world ERP

Alaska Retirement List

Alaska Retirement Entry - Farm, Nichole R

Contributions

Service

Leave Balance

Member

Employment

Events

Basis Type	Basic Amount	Employee Job	Contribution Type	Contribution Amount	Pay Period Ending	Adjustment
	▼ Equals...			▼ Equals...	▼ On...	▼
Add new row						
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DB-Mandatory Employer	\$132.31	05/27/2017	☐
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DCR-HRA Employer	\$78.82	05/27/2017	☐
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DCR-Mandatory Employer	\$661.76	05/27/2017	☐
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DCR-Mandatory Employer	\$661.76	05/27/2017	☐
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DCR-Mandatory Employer	\$107.92	05/27/2017	☐
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DCR-Occupational Death & Disability Employer	\$3.67	05/27/2017	☐
Earnings used as basis for PERS contributions	\$2,158.40	HR SPECIALIST	PERS-DCR-Retiree Medical Plan Employer	\$25.47	05/27/2017	☐
Earnings used as basis for SBS contributions	\$2,158.40	HR SPECIALIST	SBS-AP-Mandatory Employer	\$132.31	05/27/2017	☐
Earnings used as basis for SBS contributions	\$2,158.40	HR SPECIALIST	SBS-AP-Mandatory Employer	\$132.31	05/27/2017	☐
Earnings used as basis for SBS contributions	\$2,158.40	HR SPECIALIST	SBS-VSB-Employee Survivor Benefit Insurance	\$6.61	05/27/2017	☐

Save

Reset

» Service



myFavorites | Financial Management | Human Resources | Maintenance

Alaska Retirement List

Alaska Retirement Entry - Farm, Nichole R

Contributions

Service

Leave Balance

Member

Employment

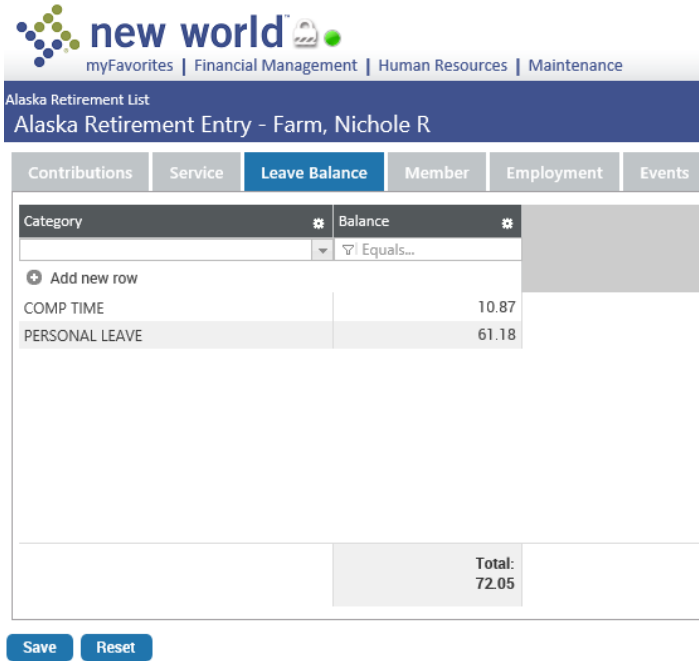
Events

Employee Job	Service Type	Service Date	Service Units	Adjustment
+ Add new row		▽ On...	▽ Equals...	▽
HR SPECIALIST	Postive Hours in Paid Status	05/27/2017	80.00	☐

Save

Reset

» Leave Balance



Alaska Retirement List
Alaska Retirement Entry - Farm, Nichole R

Category	Balance
+ Add new row	
COMP TIME	10.87
PERSONAL LEAVE	61.18
Total: 72.05	

Save Reset

To edit a record, select the appropriate row and fill in the details of a new retirement contribution record. To add a record, select the **+ Add new row** at the top of the grid and populate the values accordingly. To delete a row, hover over the row and click on the **X** at the far-right end of the row.

Personnel Data

The Alaska Retirement Entry page has six tabs that will contain a combination of payroll data and member data. The data that will be used to create the personnel transmittal file consists of the following:

» Member


[myFavorites](#) | [Financial Management](#) | [Human Resources](#) | [Maintenance](#)

Alaska Retirement List

Alaska Retirement Entry - Farm, Nichole R

Contributions	Service	Leave Balance	Member	Employment	Events
Title ▼ Include in Transmittal ☒ Last Name Farm First Name Nichole Middle Name R Suffix ▼ Social Security Number 864004554 Date of Birth 12/11/1986 Gender F - Female Marital Status M - Married Home Address Line 1 Home Address Line 2 Home City Home State ▼ Home Zip Mail Address Line 1 8549 Derrick Ln Mail Address Line 2 Mail City TROY Mail State MI - Michigan Mail Zip 48084 Home Phone Number Home Email Address Cell Phone Number Work Phone Number Work Email Address					

Save

Reset

» Employment


[myFavorites](#) | [Financial Management](#) | [Human Resources](#) | [Maintenance](#)

new world ERP

Alaska Retirement List

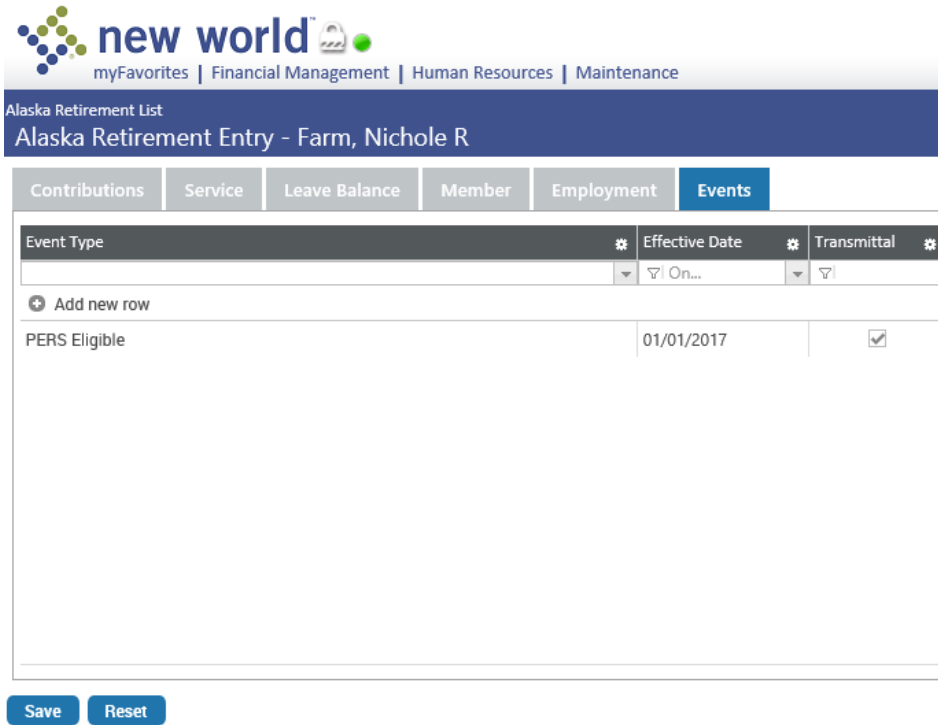
Alaska Retirement Entry - Farm, Nichole R

Contributions	Service	Leave Balance	Member	Employment	Events																		
<table border="1"> <thead> <tr> <th>Employee Job</th> <th>Effective Date</th> <th>Plan Code</th> <th>Occupational Code</th> <th>Part-Time</th> <th>On-Call</th> <th>Student Intern</th> <th>Short-Term</th> <th>Transmittal</th> </tr> </thead> <tbody> <tr> <td>▼ Contains...</td> <td>▼ On...</td> <td>▼ Contains...</td> <td>▼ Contains...</td> <td>▼</td> <td>▼</td> <td>▼</td> <td>▼</td> <td>▼</td> </tr> </tbody> </table>						Employee Job	Effective Date	Plan Code	Occupational Code	Part-Time	On-Call	Student Intern	Short-Term	Transmittal	▼ Contains...	▼ On...	▼ Contains...	▼ Contains...	▼	▼	▼	▼	▼
Employee Job	Effective Date	Plan Code	Occupational Code	Part-Time	On-Call	Student Intern	Short-Term	Transmittal															
▼ Contains...	▼ On...	▼ Contains...	▼ Contains...	▼	▼	▼	▼	▼															

Save

Reset

» Events



new world[™]
myFavorites | Financial Management | Human Resources | Maintenance

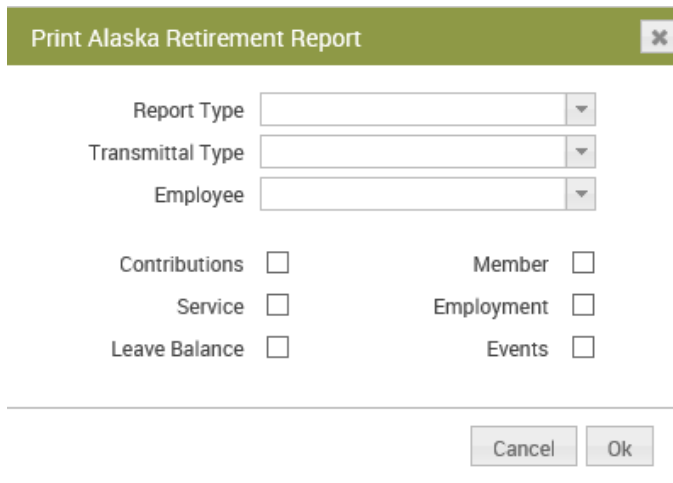
Alaska Retirement List
Alaska Retirement Entry - Farm, Nichole R

Contributions	Service	Leave Balance	Member	Employment	Events												
<table border="1"> <thead> <tr> <th>Event Type</th> <th>Effective Date</th> <th>Transmittal</th> </tr> </thead> <tbody> <tr> <td>▼</td> <td>▼ On...</td> <td>▼</td> </tr> <tr> <td colspan="3">+ Add new row</td> </tr> <tr> <td>PERS Eligible</td> <td>01/01/2017</td> <td>☒</td> </tr> </tbody> </table>						Event Type	Effective Date	Transmittal	▼	▼ On...	▼	+ Add new row			PERS Eligible	01/01/2017	☒
Event Type	Effective Date	Transmittal															
▼	▼ On...	▼															
+ Add new row																	
PERS Eligible	01/01/2017	☒															

Save Reset

Print Reports and Transmittal

To generate and display the Alaska Retirement Reports containing the latest retirement data, click the **Print** button at the bottom of the Alaska Retirement List page. A **dialog** will appear with multiple report output options.



Print Alaska Retirement Report

Report Type ▼

Transmittal Type ▼

Employee ▼

Contributions ☐ Member ☐

Service ☐ Employment ☐

Leave Balance ☐ Events ☐

Cancel Ok

Field	Descriptions
Report	Required. The available options are Detail and Summary . The Detail

Field	Descriptions
Type	report will display all contributions, with the details of each contribution listed individually. The Summary report will sum all the contributions into one line for each employee.
Transmittal Type	Required. Select whether the transmittal file data will be Personnel Only , Payroll Only or a combination of Personnel and Payroll .
Check Boxes	Select the check boxes next to the types of data you want to include on the PDF report. If no check box is selected, the report will not contain data. The transmittal reports selected during the print process will always display all the available data, regardless of the check boxes selected.

Only data present in the list pages will be used to create retirement data reports.

If the create process was completed for personnel data only, you will see only personnel data in the reports. If the process was completed for payroll data only, the retirement list will contain data for the payroll transmittal only, and the reports, therefore, will hold data within the payroll tabs only: **Contributions**, **Service** and **Leave Balance**.

Upon submitting the reporting data, the selected reports will be generated and sent to myReports.

Sample Report and Transmittal Outputs

Payroll Summary



Alaska Retirement Listing				
Report Type - Summary				
Transmittal Type -				
Employee	Basis Amount	Contributions	Service	Leave Balance
5727 Atha, Jaren G	2,381.60	2,128.42	80.0000	37.3700
7256 Farn, Nichole R	2,158.40	1,942.94	80.0000	72.0500
5432 Mensi, Asa M	2,265.60	2,035.29	80.0000	4.8800
Total Employees 3	6,805.60	6,106.65	240.0000	114.3000

Payroll Detail



Alaska Retirement Payroll Transmittal File

Report Type - Detail
Transmittal Type - Personnel Only

Employee		Basis Amount	Contributions	Service	Leave Balance	
5727 Atha, Jaren G		2,381.60	2,128.42	80.0000	37.3700	
Contributions						
Employee Job	Basis Type	Amount	Contribution Type		Amount	Adjustment
LEGAL SECRETARY 2	Earnings used as basis for PERS contributions	2,381.60	PERS-DB-Mandatory Employer		145.99	
LEGAL SECRETARY 2	Earnings used as basis for PERS contributions	2,381.60	PERS-DCR-HRA Employer		78.82	
LEGAL SECRETARY 2	Earnings used as basis for PERS contributions	2,381.60	PERS-DCR-Mandatory Employee		730.20	
LEGAL SECRETARY 2	Earnings used as basis for PERS contributions	2,381.60	PERS-DCR-Mandatory Employer		119.08	
LEGAL SECRETARY 2	Earnings used as basis for PERS contributions	2,381.60	PERS-DCR-Occupational Death & Disability Employer		4.05	
LEGAL SECRETARY 2	Earnings used as basis for PERS contributions	2,381.60	PERS-DCR-Retiree Medical Plan Employer		28.10	
LEGAL SECRETARY 2	Earnings used as basis for SBS contributions	2,381.60	SBS-AP-Mandatory Employee		145.99	
LEGAL SECRETARY 2	Earnings used as basis for SBS contributions	2,381.60	SBS-AP-Mandatory Employer		145.99	
Service						
Employee Job	Type	Date	Hours	Adjustment		
LEGAL SECRETARY 2	Positive Hours in Paid Status	05/27/2017	80.000000			
Leave Balance						
Category	Balance					
COMP TIME	5.6300					
PERSONAL LEAVE	31.7372					
7256 Farm, Nichole R		2,158.40	1,942.94	80.0000	72.0500	
Contributions						
Employee Job	Basis Type	Amount	Contribution Type		Amount	Adjustment
HR SPECIALIST	Earnings used as basis for PERS contributions	2,158.40	PERS-DB-Mandatory Employer		132.31	
HR SPECIALIST	Earnings used as basis for PERS contributions	2,158.40	PERS-DCR-HRA Employer		78.82	
HR SPECIALIST	Earnings used as basis for PERS contributions	2,158.40	PERS-DCR-Mandatory Employee		661.76	
HR SPECIALIST	Earnings used as basis for PERS contributions	2,158.40	PERS-DCR-Mandatory Employer		107.92	
HR SPECIALIST	Earnings used as basis for PERS contributions	2,158.40	PERS-DCR-Occupational Death & Disability Employer		3.67	

Personnel Summary/Detail



Alaska Retirement Listing

 Report Type - Summary
 Transmittal Type -

Employee

5727 Atha, Jaren G

Member Information

SSN	253-00-6712	Mail Address	2204 Wells St TROY MI 48064	Home Address	2204 Wells St TROY MI 48064
Date of Birth	05/20/1958				
Gender	Male			Home Email	
Marital Status	M	Work Email		Home Phone	(327) 067-2439
Cell Phone Number		Work Phone			

Events

Type	Effective Date
Rehire	01/01/2017

7204 Balletto, Javion A

Member Information

SSN	239-00-4126	Mail Address	9259 Drury Ln TROY MI 48064	Home Address	
Date of Birth	04/26/1983				
Gender	Female			Home Email	
Marital Status	S	Work Email		Home Phone	(327) 067-2439
Cell Phone Number		Work Phone			

7415 Barvelos, Skye D

Member Information

SSN	667-00-6981	Mail Address	2306 Abernathy Rd TROY MI 48064	Home Address	
Date of Birth	07/23/1982				
Gender	Male			Home Email	
Marital Status	M	Work Email		Home Phone	
Cell Phone Number		Work Phone			

Payroll Transmittal File

```

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Personnel Transmittal File

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 MEM,269,Heninger,Marjorie,C.,842006101,19496018,M,Male,3347 Atlantic Trl.,TROY,MI,48084,,,,,Heninger@local.com,,,,,3270672439,
 MEM,418,Tannen,Filina,,22805233,19550921,S,Male,3327 Johnston Row.,TROY,MI,48084,9327 Johnston Row.,TROY,MI,48084,Tannen@Local.com,,,,,3270672439,
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[Human Resources](#) > [State Requirements](#) > [AZ](#) > [Public Safety PRS Report](#)

Arizona System Settings Maintenance

Arizona Public Safety PRS List

Maintenance > new world ERP Suite > Security > User-Defined Fields

Maintenance > Human Resources > Earnings Maintenance > Hours Codes

A user-defined field (UDF) may be created to exclude an hours code from medicare gross, then split it between regular pay, overtime, lump sum and other pay.

To create the UDF, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields.
2. In the *Record Type* field, select **Hours Code**.
3. In the *Maintenance Type* field, select **Attributes**.
4. Click **New**. The User-Defined Fields dialog opens.
5. In the *Name* field, type **CA Adj Medicare Comp**.

6. If you have created a *Section Header* for CalPERS, select it.
7. If you want the UDF to appear in a specific position in the list of UDFs, select a *Sequence Number*.
8. In the *Data Type* field, select **Check Box**.

User-Defined Fields

User Defined Field Attributes

Name

Section Header

Sequence Number

Data Type

9. Click **OK**.

To select the UDF on an hours code, follow these steps:

1. Navigate to Maintenance > Human Resources > Earnings Maintenance > Hours Codes.
2. In the grid on the Hours Codes List page, select the row containing the hours code.
3. Click the **User-Defined Fields** button at the bottom of the page. The Hours Code User-Defined Fields page displays with the *CA Adj Medicare Comp* check box available for selection:


new world

[myFavorites](#) | [Financial Management](#) | [Human Resources](#) | [Utility Management](#) | [Community Development](#) | [Maintenance](#)

Hours Codes List
 Hours Code User Defined Fields - Reg ALL

2004W2Box12

2004W2Box14

ASRS

CA Adj Medicare Comp ☒

FLSA Amount Only ☐

NVPERS

NVPERSStatusCode

PA Exclude From Gross ☐

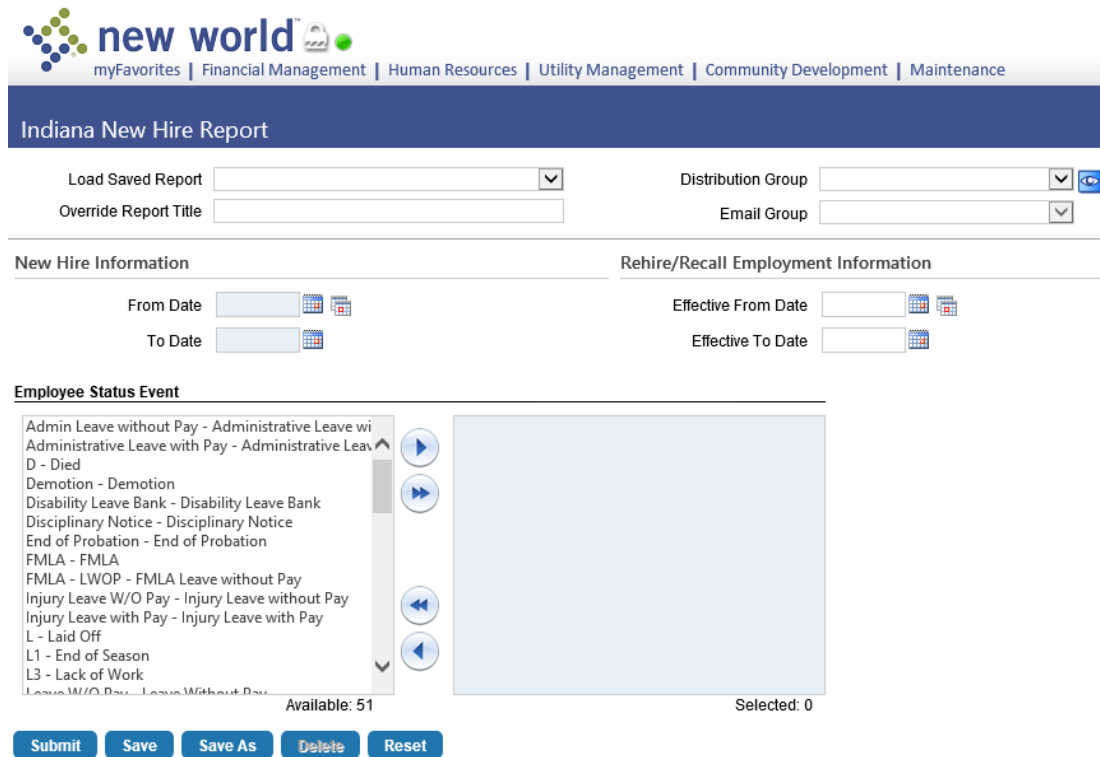
WRS Wages Only ☐

IA PERS Wages ☒

Indiana New Hire Report

Human Resources > State Requirements > IN > New Hire Report

The **New Hire Report** has been added to the Indiana State Requirements menu.

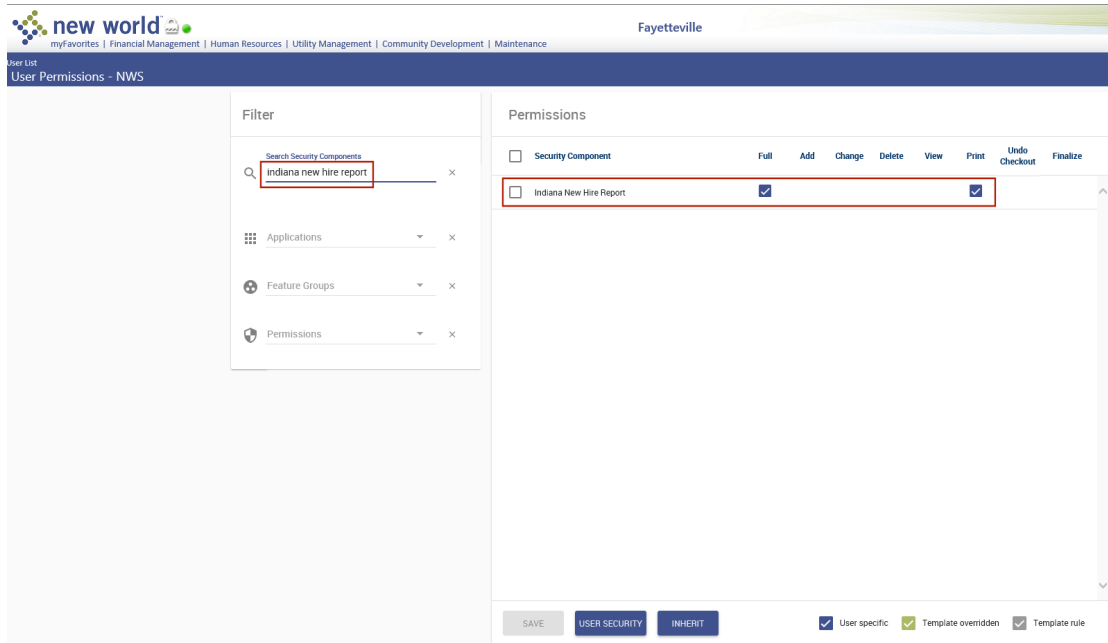


The screenshot shows the 'Indiana New Hire Report' form. At the top, there's a navigation bar with 'myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance'. Below this is a dark blue header with the title 'Indiana New Hire Report'. The form contains several input fields: 'Load Saved Report' (a dropdown menu), 'Override Report Title' (a text field), 'Distribution Group' (a dropdown menu with a search icon), and 'Email Group' (a dropdown menu). Below these are two sections: 'New Hire Information' and 'Rehire/Recall Employment Information'. 'New Hire Information' includes 'From Date' and 'To Date' (both with calendar icons). 'Rehire/Recall Employment Information' includes 'Effective From Date' and 'Effective To Date' (both with calendar icons). Below these sections is the 'Employee Status Event' section. It features a list of events on the left, such as 'Admin Leave without Pay - Administrative Leave wi', 'Administrative Leave with Pay - Administrative Leav', 'D - Died', 'Demotion - Demotion', 'Disability Leave Bank - Disability Leave Bank', 'Disciplinary Notice - Disciplinary Notice', 'End of Probation - End of Probation', 'FMLA - FMLA', 'FMLA - LWOP - FMLA Leave without Pay', 'Injury Leave W/O Pay - Injury Leave without Pay', 'Injury Leave with Pay - Injury Leave with Pay', 'L - Laid Off', 'L1 - End of Season', and 'L3 - Lack of Work'. To the right of the list is a large light blue area for selecting events. Below the list, it says 'Available: 51' and 'Selected: 0'. At the bottom of the form are five buttons: 'Submit', 'Save', 'Save As', 'Delete', and 'Reset'.

Permissions

For the option to appear on the menu, each user needs permission to a new security component, Indiana New Hire Report:

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page opens.
2. Select the user's row.
3. Click **Permissions**. The User Permissions page opens, containing a Permissions panel of security components and a Filter panel.
4. In the *Search Security Components* filter, type **Indiana New Hire Report** (the entry is not case sensitive). The grid refreshes to contain the **Indiana New Hire Report security component** only.



The screenshot shows the 'User Permissions - NWS' configuration window. On the left, the 'Filter' panel has a search bar with 'Indiana new hire report' entered. Below the search bar are expandable sections for 'Applications', 'Feature Groups', and 'Permissions'. The 'Permissions' section is expanded, showing a list of permissions. The 'Indiana New Hire Report' permission is selected, and the 'Full' permission level is chosen. The 'Permissions' panel also includes buttons for 'Full', 'Add', 'Change', 'Delete', 'View', 'Print', 'Undo', 'Checkout', and 'Finalize'. At the bottom of the window, there are buttons for 'SAVE', 'USER SECURITY', and 'INHERIT', along with checkboxes for 'User specific', 'Template overridden', and 'Template rule'.

5. Select *Full* permission.
6. Click **SAVE**.
7. For the permission to take effect, the user needs to log off and log back onto the system.

Indiana New Hire Report

To run the Indiana New Hire Report, navigate to Human Resources > State Requirements > IN > **New Hire Report**.



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Indiana New Hire Report

Load Saved Report
Override Report Title

Distribution Group 
Email Group

New Hire Information

From Date 
To Date 

Rehire/Recall Employment Information

Effective From Date 
Effective To Date 

Employee Status Event

Admin Leave without Pay - Administrative Leave without Pay
Administrative Leave with Pay - Administrative Leave with Pay
D - Died
Demotion - Demotion
Disability Leave Bank - Disability Leave Bank
Disciplinary Notice - Disciplinary Notice
End of Probation - End of Probation
FMLA - FMLA
FMLA - LWOP - FMLA Leave without Pay
Injury Leave W/O Pay - Injury Leave without Pay
Injury Leave with Pay - Injury Leave with Pay
L - Laid Off
L1 - End of Season
L3 - Lack of Work
Leave W/O Pay - Leave Without Pay

Available: 51

Selected: 0

Fields

Field	Description
<i>Load Saved Report</i>	Saves this version of the report as a template for later use. When you click Save , a dialog will ask you to name the report. Type the name, and click OK . The next time you want to run this report, select its name from the Load Saved Report drop-down, and the fields will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
<i>Override Report Title</i>	Overrides the default report title, (Indiana New Hire Report).
<i>Distribution Group</i>	A group of people selected to receive the report in myReports. Click in the field to select from a list of existing groups, or click the blue-eye prompt  to create a new distribution group. The report will be sent to myReports for each person in the group.
<i>Email Group</i>	A group of people selected to receive the report by email. Click in the field to select from a list of existing groups. To create a new email group, click  .

Field	Description
<i>From Date</i>	Required. Date range within which employee new hire information is captured. The report will include all employees who have hire dates and employee status events that fall within this period. You may use the calendar prompts to select the dates.
<i>To Date</i>	
<i>Effective From Date</i>	Date range within which employee rehire/recall information is captured. Employees who have not been paid in the last 60 days before being paid as rehired or recalled employees within the effective date range selected will appear on the report.
<i>Effective To Date</i>	
<i>Employee Status Event</i>	Employee status events to be included on the report. Select status events by moving them from the Available list box to the Selected list box. For every status event selected, the report will include the employees who had an employment effective date within the date range selected, were paid within the same date range and were not paid at least 60 days prior. The available status events come from validation set 368-Employee Status Event (Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List).

After making your selections on this page, click **Submit** to generate and **display** the report.

Indiana New Hire Report - Internet Explorer

1 of 1 100% Find | Next

Indiana New Hire Report

Date Range 01/01/17 - 12/31/17

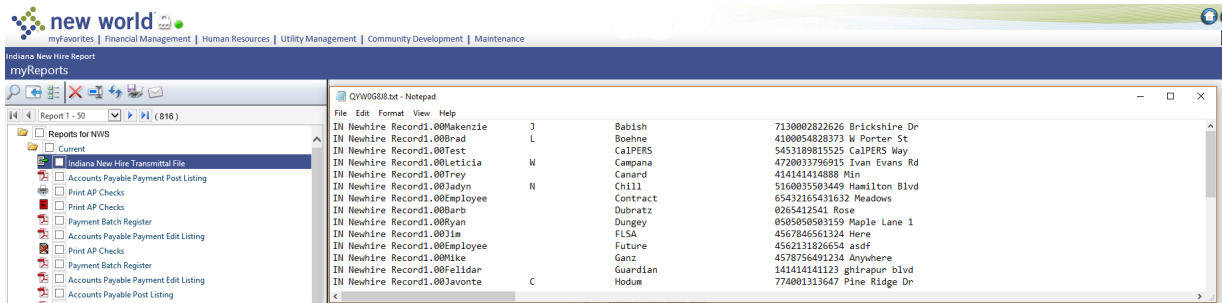
Employer Name: New World City Federal EIR 99-8877664 Address: 888 W. Big Beaver Suite 600 Troy, NY 72701

SSN	Employee Name	Employee Address	Date Of Birth	Date Of Hire
713-00-0282	Babish, Makenzie J	2626 Brickshire Dr, TROY, MI 48064	02/21/1990	01/09/2017
410-00-5482	Boehme, Brad L	8373 W Porter St, TROY, MI 48064	04/30/1970	01/01/2017
545-31-8981	CARPES, Test	5525 CARPES Way, MADISON HEIGHTS, MI 48071	02/26/1980	06/01/2017
472-00-3379	Campana, Leticia W	6915 Ivan Evans Rd, TROY, MI 48064	03/18/1975	01/03/2017
414-14-1414	Canard, Trey	888 Min, LIVONIA, MI 48152	04/14/1994	01/01/2017
516-00-3550	Chib, Jady N	3449 Hamilton Blvd, TROY, MI 48064	11/06/1995	01/17/2017
654-32-1654	Contract, Employee	31632 Meadows, MADISON HEIGHTS, MI 48071	02/27/1980	01/01/2017
026-54-1254	Dubratz, Barb	1 Russe, WASHINGTON, MI 48094	09/26/1990	06/01/2017
050-50-5050	Dungey, Ryan	3159 Haple Lane 1, Warren, MI 48094	05/05/1995	01/01/2017
456-78-4656	FLCA, Jim	1324 Here, TROY, MI 48064	02/27/1980	01/01/2017
456-21-3182	Future, Employee	6654 asdf, Troy, MI 48064	02/27/1980	09/01/2017
457-87-5649	Ganz, Mike	1234 Anywhere, TROY, MI 48064	05/26/1962	01/01/2017
141-41-4141	Guardian, Feldar	123 glapour Blvd, Troy, MI 48064	09/29/2016	01/01/2017
774-00-1313	Hodum, Javonte C	647 Pine Ridge Dr, TROY, MI 48064	08/30/1951	01/22/2017
678-00-7554	Kiang, Emma W	90 Cardinal Rd C23, TROY, MI 48064	10/21/1991	01/02/2017
565-21-4894	Lynchburg, Budget	1245 Home, TROY, MI 48064	02/27/1980	01/01/2017
478-00-8742	Milfield, Cassandra P	5462 Cliffhanger Pte, TROY, MI 48064	07/18/1995	01/03/2017
026-54-3111	Odson, Thor	254 Sky, BERLIN, MI 48002	08/01/1966	07/01/2017
224-46-6651	Oregon, Tax	123456 Anywhere, TROY, MI 48064	02/27/1980	01/01/2017
111-00-2912	Purdissey, Shakira J	3348 E Railroad St, TROY, MI 48064	02/15/1989	01/03/2017
323-14-4444	QQuinham, Joe	1 Rose, WASHINGTON, MI 48094	09/26/1990	08/26/2017
026-56-1313	QQuinham, Mary	65444 Ruby, STERLING HEIGHTS, MI 48310	08/16/1990	08/01/2017
025-86-3145	QQuinham, Mary	1 Romeo, STERLING HEIGHTS, MI 48312	08/10/1990	05/05/2017
546-98-7132	Schulte, James	31632 Meadows, MADISON HEIGHTS, MI 48071	02/27/1955	01/01/2017
145-64-3219	Schulte, Makenna	30632 Meadows, MADISON HEIGHTS, MI 48071	02/27/1980	02/01/2017
453-12-1684	Schulte, Marissa	5555 Here, TROY, MI 48064	02/27/1980	01/01/2017
026-54-1021	Smith, Faith	454 Ruby, STERLING HEIGHTS, MI 48312	01/01/1955	10/01/2017
177-00-8182	Teruel, Savannah W	8030 Indian Mounds Rd, TROY, MI 48064	04/26/2000	01/03/2017
544-12-3685	TIER 3, PERA	4568 Here, MADISON HEIGHTS, MI 48071	02/27/1988	01/01/2017
633-21-1455	TIER 4, PERA	8545 Twister, TROY, MI 48064	01/01/2000	01/01/2017
713-74-1329	TIER 5, PERA	66652 Today, ROYAL OAK, MI 48073	06/26/1972	01/01/2017
212-46-5691	TIER 6, PERA	13245 Somerset, SAINT CLAIR SHOR, MI 48081	02/27/1978	01/01/2017
789-45-6132	TIER One, PERA Test	31632 Meadow, MADISON HEIGHTS, MI 48071	02/27/1980	01/01/2017
214-98-1320	TIER Two, PERA	1234 Anywhere, MADISON HEIGHTS, MI 48071	02/27/1968	01/01/2017

Grand Total Employees 34

Run by NWS on 01/02/2018 11:47:05 AM Page 1 of 1

A **transmittal file** of the report data also will be sent to *myReports*.



Iowa PERS Report

Human Resources > State Requirements > IA > System Settings Maintenance

Human Resources > State Requirements > IA > Retirement List

The Iowa PERS reporting process has been improved with the additions of a System Settings Maintenance page and an Iowa Retirement List page that combines the create and report functions.

Permissions

Users need permission to a new security component, Iowa System Settings Maintenance:

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page opens.
2. Select the user's row.
3. Click **Permissions**. The User Permissions page opens, containing a grid of security components and a filter panel.
4. In the *Search Security Components* filter, type **Iowa System Settings** (the entry is not case sensitive). The grid refreshes to contain the Iowa **System Settings Maintenance security component** only:

The screenshot shows the 'User Permissions - NWS' interface. On the left, a 'Filter' panel contains a search bar with 'iowa system settings' and several category filters: Applications, Feature Groups, and Permissions. The main 'Permissions' table has a header row with columns: Security Component, Full, Add, Change, Delete, View, Print, Undo/Checkout, and Finalize. A single row is visible, 'iowa System Settings Maintenance', with checkboxes for 'Full', 'Add', 'Change', 'Delete', 'View', and 'Print', all of which are checked. At the bottom, there are buttons for 'SAVE', 'USER SECURITY', and 'INHERIT', and checkboxes for 'User specific', 'Template overridden', and 'Template rule'.

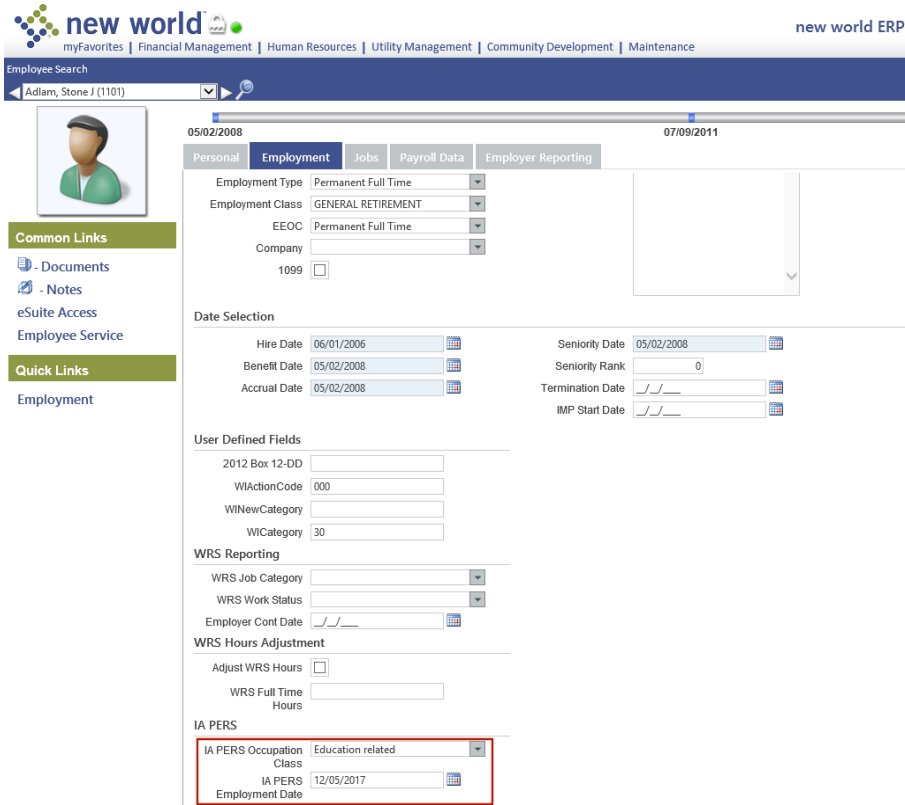
5. Select the appropriate permissions.
6. Click **SAVE**.

User-Defined Fields

IA PERS Occupation Class and IA PERS Employment Date

Human Resources > Workforce Administration > Search > Employee > Employment tab

On the **Employment** tab of Workforce Administration, the *IA PERS Occupation Class* UDF has been changed from a text field to a drop-down based on a pre-loaded validation set, **602-Iowa PERS Occupation Class**.



IA PERS Employment Date is a new UDF available to users to override hire dates that may differ from PERS employment dates. The *First Date of Employment* column on the Iowa Retirement Report contains an employee's hire date by default. If a date is selected in the *IA PERS Employment Date* UDF, it appears in this column instead.

To create the UDF, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields.
2. In the *Record Type* field, select **Employee Employment**.
3. In the *Maintenance Type* field, select **Attributes**.
4. Click **New**. The User-Defined Fields dialog opens.
5. In the *Name* field, type **IA PERS Employment Date**.
6. If you have created a *Section Header* for Iowa PERS, select it.
7. If you want the UDF to appear in a specific position in the list of UDFs, select a *Sequence Number*.
8. In the *Data Type* field, select **Date/Time**.

9. Leave the *Required* check box deselected.

10. Click **OK**.

IA PERS Deduction, IA PERS Wages and IA PERS Termination Indicator

The *IA PERS Deduction*, *IA PERS Wages* and *IA PERS Termination* UDFs have been removed from the Iowa PERS reporting process.

The deduction selection process on a new System Settings Maintenance page (see next section) has eliminated the need for the *IA PERS Deduction* and *IA PERS Wages* UDFs.

Instead of using an *IA PERS Termination* UDF, the reporting process has been modified to use the termination dates from the **Employment** tab in Workforce Administration.

System Settings Maintenance

Human Resources > State Requirements > IA > System Settings Maintenance

A **System Settings Maintenance** option has been added to the Iowa State Requirements menu. This option opens the **System Settings Maintenance page**. Use this page to identify employer and agency numbers, determine whether to merge records that have the same SSNs and select the deduction codes to be used in PERS reporting.


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System Settings Maintenance

Company Settings

PERS Reporting

Employer Number

77777

Agency Number

55555

Combine Employee SSN on Transmittal

☐

PERS Deductions

100 - WI CHILD SUPPORT COLLECTIONS

101 - WI CHILD SUPPORT COLLECTIONS

102 - ANNUAL R&D WITHHOLDING

106 - TAX GARNISHMENT \$

107 - GARNISH AFTER TAX %

108 - GARNISHMENT \$

109 - GARNISHMENT %

110 - PAYROLL ADVANCE DEDUCTION

112 - GARNISHMENT % - Disposable

120 - INS REPAYMENT

139 - TAX GARNISHMENT %

149 - Wasup City Treas 3.00 Ded Fee

199 - Health Plan A - Law Enforce

200 - Health EE Partial Pay Prem

276 - Health EE NOPRETAX

513 - EE Additional Life Insurance

515 - Dependent Life Insurance

WRS - WRS Pension

Available: 38

Selected: 1

Save

Retirement List

Field	Description
<i>Employee Number</i>	Five-digit, state-assigned account number identifying the employer.
<i>Agency Number</i>	Primary agency to be reported.
<i>Combine Employee SSN on Transmittal</i>	If selected, transmittal file merges records that have the same social security numbers, summing total wages. This feature only applies to the transmittal file. Records will continue to show individually on the Iowa Retirement List page (see next section).
<i>PERS Deductions</i>	Deduction codes to which PERS wages will be applied to determine the deduction gross in PERS reporting. Select codes by moving them from the <i>Available</i> to the <i>Selected</i> list box. As noted earlier, this selection process has eliminated the need for the <i>IA PERS Deduction</i> and <i>IA PERS Wages</i> UDFs.

To navigate back and forth from this page to the Iowa Retirement List page while performing setup and running reports, use the **Retirement List** button on this page and the **Settings** button on the Iowa Retirement List page.

Iowa Retirement List

Human Resources > State Requirements > IA > Retirement List

The **IPERS List** option on the Iowa State Requirements menu has been renamed as **Retirement List**. This option opens the [Iowa Retirement List page](#).



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Iowa Retirement List				
☐	Employee #	Employee Name	Wages	Occupation Class
☐	562	Abramovitz, Isis J	\$2,112.80	01 - Regular employees
☐	291	Acedo, Malia P	\$1,964.80	01 - Regular employees
☐	238	Borns, Devin G	\$2,135.85	01 - Regular employees
☐	1942	Borns, Devin G	\$1,833.60	01 - Regular employees
☐	567	Brimmage, Kaitlynn C	\$2,303.20	01 - Regular employees
☐	1866	Clevinger, Lloyd N	\$1,700.80	01 - Regular employees
☐	3162	Der, Tanner E	\$2,653.60	01 - Regular employees
☐	1699	Hagaman, Eve W	\$1,850.93	01 - Regular employees
☐	3125	Kromm, Judah R	\$2,117.35	01 - Regular employees
☐	1677	Tatom, Darrell M	\$2,174.90	01 - Regular employees
☐	1575	Tibbit, Laila J	\$1,846.40	01 - Regular employees

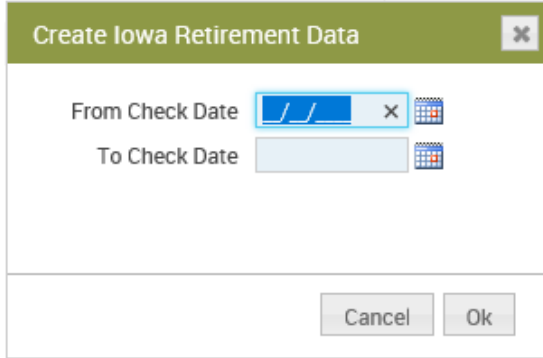
1 - 11 of 11 records

 Create
  New
  Print
  Delete
  Settings

The creating and printing of PERS data occurs from here. The **Create and Print buttons** at the bottom of the page replace the **Create IPERS Data** and **IPERS Report** options on the state requirements menu:

 Create
  New
  Print
  Delete
  Settings

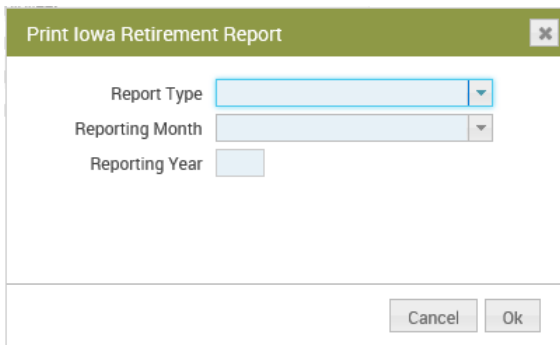
The **Create** button opens a **Create Iowa Retirement Data dialog** containing *From Check Date* and *To Check Date* fields.



The dialog box has a title bar 'Create Iowa Retirement Data' with a close button. It contains two date selection fields: 'From Check Date' with a date picker icon and 'To Check Date' with a date picker icon. At the bottom are 'Cancel' and 'Ok' buttons.

After making selections, click **Ok** to create an on-screen work file of retirement system data that will be available for the Iowa Retirement Report. This data may be reviewed and modified before it is transmitted to the state.

The **Print** button opens a **Print Iowa Retirement Report dialog** containing *Report Type*, *Reporting Month* and *Reporting Year* fields.



The dialog box has a title bar 'Print Iowa Retirement Report' with a close button. It contains three fields: 'Report Type' with a dropdown arrow, 'Reporting Month' with a dropdown arrow, and 'Reporting Year' with a text input field. At the bottom are 'Cancel' and 'Ok' buttons.

The *Report Type* field gives you the option to generate the report in summary or detail. The summary report contains employees, social security numbers, occupation codes, wages and first dates of employment. The detail report contains the same information plus dates of birth, genders, addresses, employer IDs, agency codes, termination dates and last check dates.

After making selections, click **Ok** to generate the Iowa Retirement Report and transmittal file in myReports.

Sample Reports and Transmittal File

Summary Report



Iowa Retirement Transmittal File

 November 2017
 Summary

Employee	SSN	Occupation Code	Wages	First Date of Employment
562 Abramovitz, Isis J	564-00-6253	01 - Regular employees	2,112.80	01/15/1996
291 Acedo, Malia P	582-00-3230	01 - Regular employees	1,964.80	01/02/2001
238 Borns, Devin G	270-00-0088	01 - Regular employees	2,135.85	09/05/2000
1942 Borns, Devin G	270-00-0088	01 - Regular employees	1,833.60	10/01/2017
567 Brimimage, Kaitlynn C	556-00-8715	01 - Regular employees	2,303.20	01/29/1996
1866 Clevinger, Lloyd N	010-00-7541	01 - Regular employees	1,700.80	10/24/2016
3162 Der, Tanner E	896-00-6107	01 - Regular employees	2,653.60	01/01/2017
1699 Hagaman, Eve W	678-00-0890	01 - Regular employees	1,850.93	11/02/2015
3125 Kromm, Judah R	126-00-6626	01 - Regular employees	2,117.35	01/01/2017
1677 Tatom, Darrell M	228-00-9575	01 - Regular employees	2,174.90	01/05/2015
1575 Tibbit, Laila J	288-00-8592	01 - Regular employees	1,846.40	01/01/2017
Grand Totals	Employees 11		22,694.23	

Detail Report



Iowa Retirement Transmittal File

 November 2017
 Detail

Employee	SSN	Occupation Code	Wages	First Date of Employment	Date of Birth	Gender
562 Abramovitz, Isis J	564-00-6253	01 - Regular employees	2,112.80	01/15/1996	07/03/1964	Male
Address 6610 Cox St City/State/Zip TROY, MI 48084 Employer ID 77777 Agency Code 66666 Termination Date Last Check Date						
291 Acedo, Malia P	582-00-3230	01 - Regular employees	1,964.80	01/02/2001	01/21/1970	Female
Address 6538 Wells St City/State/Zip TROY, MI 48084 Employer ID 77777 Agency Code 66666 Termination Date Last Check Date						
238 Borns, Devin G	270-00-0088	01 - Regular employees	2,135.85	09/05/2000	01/20/1960	Female
Address 6375 Arbors Way City/State/Zip TROY, MI 48084 Employer ID 77777 Agency Code 66666 Termination Date Last Check Date						
1942 Borns, Devin G	270-00-0088	01 - Regular employees	1,833.60	10/01/2017	01/20/1960	Female
Address 6375 Arbors Way City/State/Zip TROY, MI 48084 Employer ID 77777 Agency Code 66666 Termination Date Last Check Date						

Transmittal File

QVW03KKS.txt - Notepad

17777720171100002269423	Isis	J6610 Cox St
277777666601564006253Abramovitz	Malia	P6538 Wells St
277777666601582003230Acedo	Devin	G6375 Arbors Way
277777666601270000088Borns	Devin	G6375 Arbors Way
277777666601270000088Borns	Kaitlynn	C8913 Frances Way
277777666601556008715Brimimage	Lloyd	N2256 Swallow Dr
277777666601010007541Clevinger	Tanner	E5676 McKaskey Creek Rd
277777666601896006107Der	Eve	W2073 Richland Dr
277777666601678000890Hagaman	Judah	R2156 Derrick Ln
277777666601126006626Kromm	Darrell	M2099 Long Trl
277777666601228009575Tatom	Laila	J46 Collins St
277777666601288008592Tibbit		
3777770000000000000011		

Kentucky Retirement Transmittal

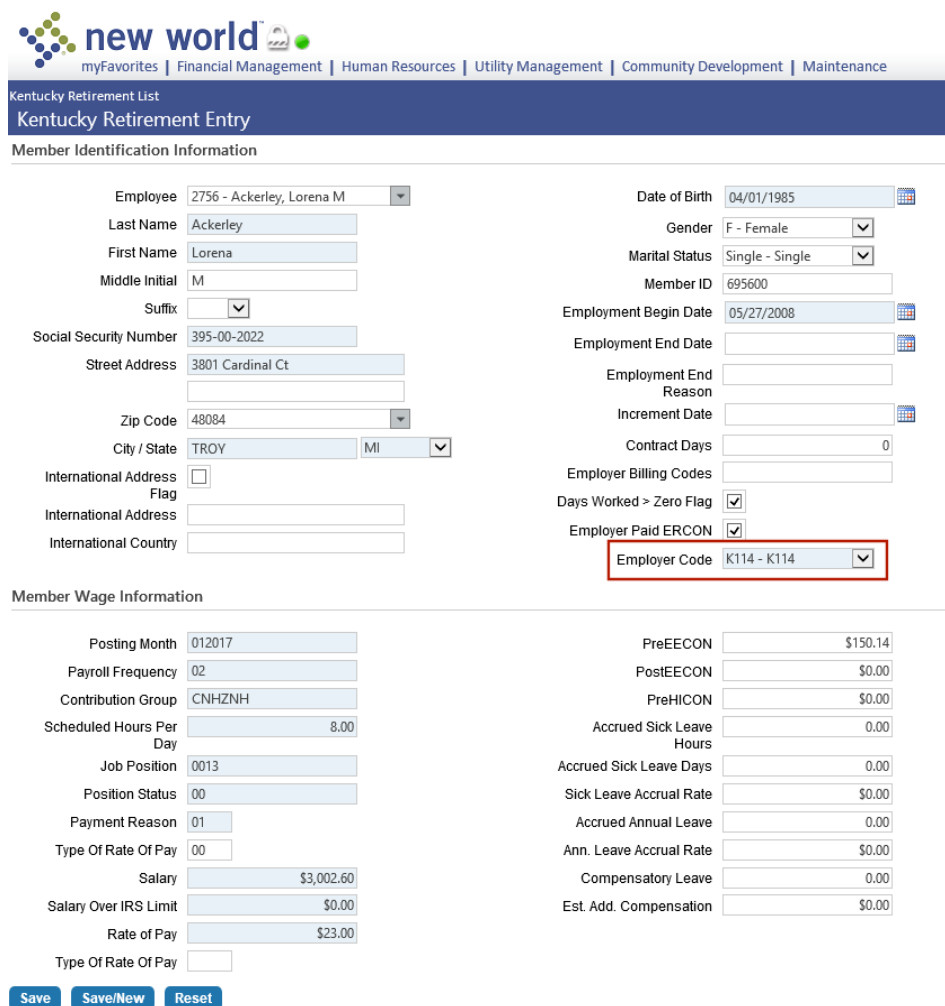
[Human Resources](#) > [State Requirements](#) > [KY](#) > [Retirement List](#) > [Employee](#)

[Human Resources](#) > [State Requirements](#) > [KY](#) > [Retirement Maintenance](#)

[Human Resources](#) > [State Requirements](#) > [KY](#) > [Retirement List](#) > [Create](#)

The Kentucky retirement reporting process has been enhanced to allow multiple combinations of employer codes and report types to be included in one transmittal file.

An *Employer Code* drop-down field has been added to the [Kentucky Retirement Entry](#) page.



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Kentucky Retirement List

Kentucky Retirement Entry

Member Identification Information

Employee	2756 - Ackerley, Lorena M	Date of Birth	04/01/1985
Last Name	Ackerley	Gender	F - Female
First Name	Lorena	Marital Status	Single - Single
Middle Initial	M	Member ID	695600
Suffix		Employment Begin Date	05/27/2008
Social Security Number	395-00-2022	Employment End Date	
Street Address	3801 Cardinal Ct	Employment End Reason	
Zip Code	48084	Increment Date	
City / State	TROY MI	Contract Days	0
International Address Flag	☐	Employer Billing Codes	
International Address		Days Worked > Zero Flag	☒
International Country		Employer Paid ERCON	☒
		Employer Code	K114 - K114

Member Wage Information

Posting Month	012017	PreEECON	\$150.14
Payroll Frequency	02	PostEECON	\$0.00
Contribution Group	CNHZNH	PreHICON	\$0.00
Scheduled Hours Per Day	8.00	Accrued Sick Leave Hours	0.00
Job Position	0013	Accrued Sick Leave Days	0.00
Position Status	00	Sick Leave Accrual Rate	\$0.00
Payment Reason	01	Accrued Annual Leave	0.00
Type Of Rate Of Pay	00	Ann. Leave Accrual Rate	\$0.00
Salary	\$3,002.60	Compensatory Leave	0.00
Salary Over IRS Limit	\$0.00	Est. Add. Compensation	\$0.00
Rate of Pay	\$23.00		
Type Of Rate Of Pay			

[Save](#) [Save/New](#) [Reset](#)

The *Default Employer Code* from the Kentucky Retirement Maintenance page will be defaulted in this field for all employees who do not have a *KY Ret Employer Code* user-defined field filled in on the [Employment tab](#) in Workforce Administration.

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Employee Search

← Ackerley, Lorena M (2756) → 🔍



05/27/2008 06/08/2009

Personal **Employment** Jobs Payroll Data Contracts Employer Reporting

KY Retirement

KY Ret Employer Code

KY Ret Contribution Group

KY Ret Member ID

KY Ret Employment Begin Date

KY Ret Employment End Date

KY Ret Employment End Reason

KY Ret Job Position

KY Ret Position Status

Common Links

 - Documents

 - Notes

eSuite Access

Employee Service

Quick Links

Employment

REP Credentials

Selections in the drop-down come from **validation set 545-NWS KY Retirement** (Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List).

Validation Set Values List - 545 NWS KY Retirement

Value	Description
K114	K114
K200	K200

[New](#) [Delete](#) [Refresh](#) [Close Window](#)

If necessary, the selection may be changed on the Kentucky Retirement Entry page.

With the addition of the *Employer Code* field to the retirement entry page, the *Use Multiple Employer Codes* check box has been removed from the **Kentucky Retirement Maintenance** page.



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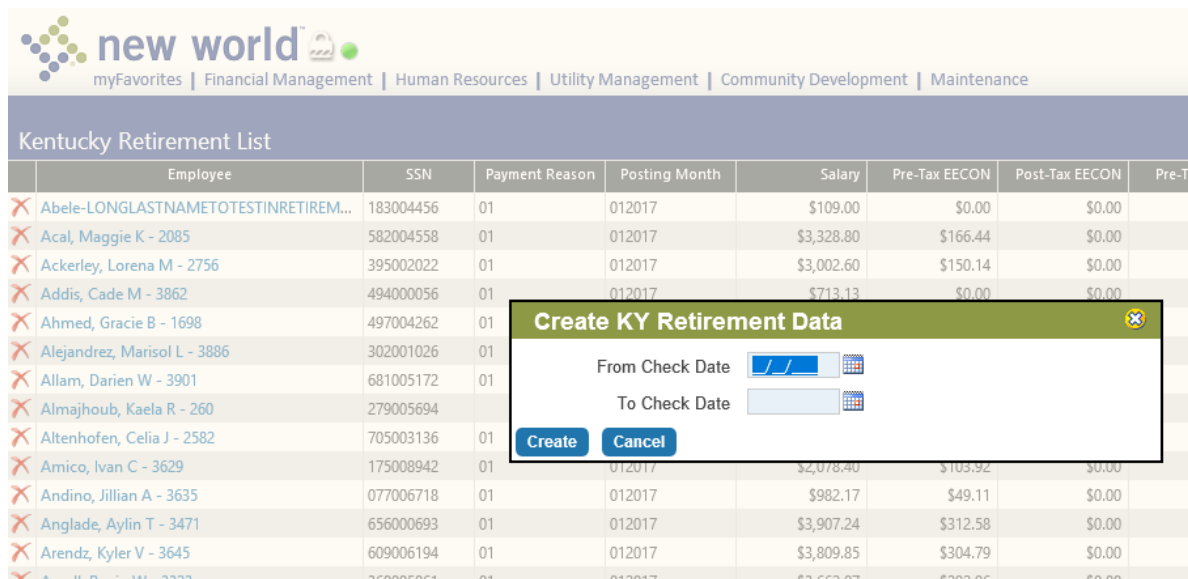
Kentucky Retirement Maintenance

Company Settings | Compensation Settings | EECON Settings | HICON Settings

Include Active Employees ☒
Not Paid
Default Employer Code K114
Report Type CERS
IRS Limit \$245,000.00

Save Reset

The *Employer Code* drop-down has been removed from the **Create KY Retirement Data** dialog.



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Kentucky Retirement List

Employee	SSN	Payment Reason	Posting Month	Salary	Pre-Tax EECON	Post-Tax EECON	Pre-Tax
Abele-LONGLASTNAME TOTEST IN RETIRE...	183004456	01	012017	\$109.00	\$0.00	\$0.00	
Acal, Maggie K - 2085	582004558	01	012017	\$3,328.80	\$166.44	\$0.00	
Ackerley, Lorena M - 2756	395002022	01	012017	\$3,002.60	\$150.14	\$0.00	
Addis, Cade M - 3862	494000056	01	012017	\$713.13	\$0.00	\$0.00	
Ahmed, Gracie B - 1698	497004262	01					
Alejandro, Marisol L - 3886	302001026	01					
Allam, Darien W - 3901	681005172	01					
Almajhoub, Kaela R - 260	279005694						
Altenhofen, Celia J - 2582	705003136	01					
Amico, Ivan C - 3629	175008942	01	012017	\$2,078.40	\$103.92	\$0.00	
Andino, Jillian A - 3635	077006718	01	012017	\$982.17	\$49.11	\$0.00	
Anglade, Aylin T - 3471	656000693	01	012017	\$3,907.24	\$312.58	\$0.00	
Arendz, Kyler V - 3645	609006194	01	012017	\$3,809.85	\$304.79	\$0.00	
Arnold, Brian W - 3232	360005661	01	012017	\$2,663.07	\$203.06	\$0.00	

Clicking **Print** from the Kentucky Retirement List page generates and sends the following three files to myReports:

Kentucky Retirement Transmittal File

The screenshot shows the New World ERP interface. On the left, a sidebar lists various reports under 'myReports'. The main window displays a Notepad application with a large text dump of data, likely a report output, containing employee IDs, names, and various numerical values.

Kentucky Retirement Earnings and Contributions

The screenshot shows the 'Kentucky Retirement Earnings and Contributions' report in the New World ERP interface. The report is displayed in a table format with columns for Employee, SSN, Member ID, Posting Month, and various earnings and contribution details.

Employee	SSN	Member ID	Posting Month
3639 Abele, LONGLASTNAME TO TEST IN RETIREMENT RENTISTRY, Cooper M	183-00-4456		201701
Member Wage Information			
Payment Reason	01		Pre-Tax EECOM \$0.00
Rate of Pay	\$8.72		Post-Tax EECOM \$0.00
Type of Rate of Pay	00		Pre-Tax HICOM \$0.00
Salary	\$109.00		Employer Paid EECOM Yes
Salary Over IRS Limit	\$0.00		Estimated Additional Compensation \$0.00
2085 Acal, Maggie K	582-00-4558	105663	201701
Member Wage Information			
Payment Reason	01		Pre-Tax EECOM \$166.44
Rate of Pay	\$15.00		Post-Tax EECOM \$0.00
Type of Rate of Pay	00		Pre-Tax HICOM \$0.00
Salary	\$3,328.80		Employer Paid EECOM Yes
Salary Over IRS Limit	\$0.00		Estimated Additional Compensation \$0.00
2756 Ackerley, Lorena M	395-00-2022	695600	201701
Member Wage Information			
Payment Reason	01		Pre-Tax EECOM \$150.14
Rate of Pay	\$23.00		Post-Tax EECOM \$0.00
Type of Rate of Pay	00		Pre-Tax HICOM \$0.00
Salary	\$3,002.60		Employer Paid EECOM Yes
Salary Over IRS Limit	\$0.00		Estimated Additional Compensation \$0.00

Kentucky Retirement Demographics Report

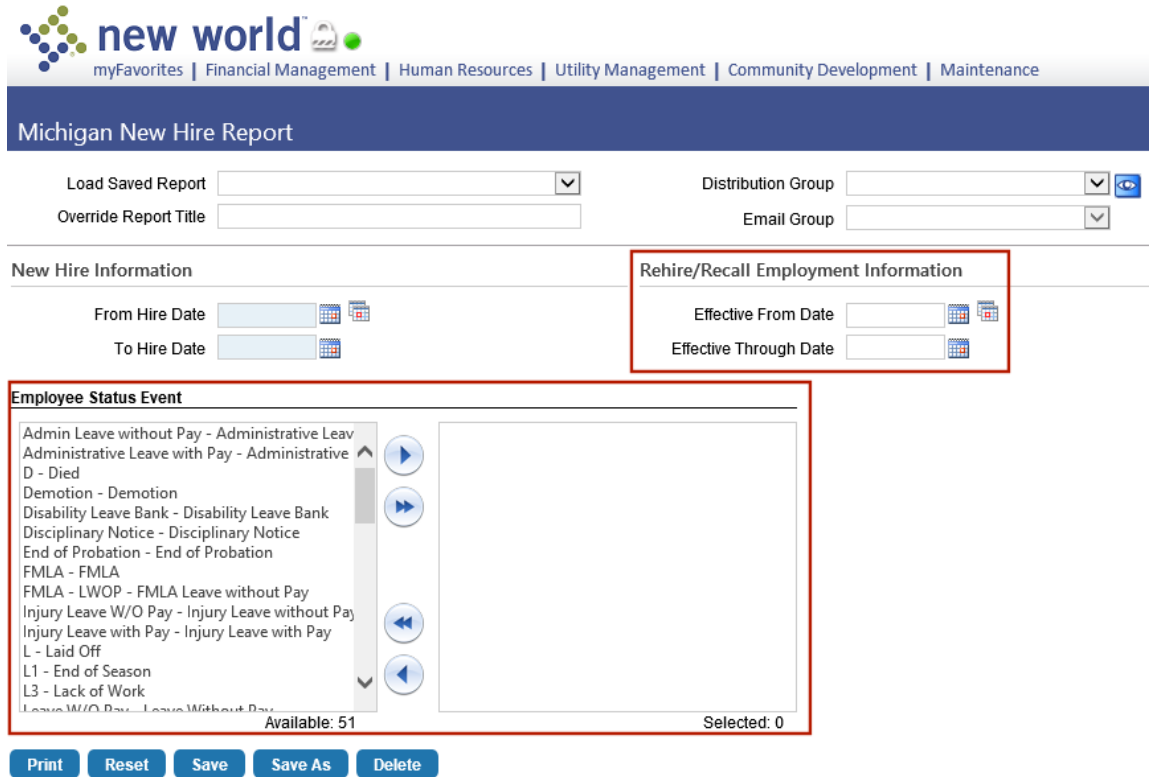
The screenshot shows the 'Kentucky Retirement Demographics Report' in the New World ERP interface. The report is displayed in a table format with columns for Employee, SSN, Member ID, Posting Month, and various demographic details.

Employee	SSN	Member ID	Posting Month	Address
3639 Abele, LONGLASTNAME TO TEST IN RETIREMENT RENTISTRY, Cooper M	183-00-4456		201701	3791 Quail Ridge Dr
Member Identification Information				
International Address Flag	No	Marital Status	M	Contract Days
Employment Begin Date	11/24/2015	Employment End Date	4/14/2016	Employer Billing Codes
Employment End Reason		Days Worked > Zero Flag	Yes	Days Worked > Zero Flag
Increment Date		Employer Paid EECOM	Yes	Employer Paid EECOM
Member Wage Information				
Payroll Frequency	02	Position Status		Accrued Annual Leave
Contribution Group	CH22NP	Accrued Sick Leave Hours	0.00	Annual Leave Accrual Rate
Scheduled Hours Per Day	4.00	Accrued Sick Leave Days	0.00	Compensatory Leave
Job Position	0013	Sick Leave Accrual Rate	\$0.00	
2085 Acal, Maggie K	582-00-4558	105663	201701	6119 Griffin Rd
Member Identification Information				
International Address Flag	No	Marital Status	M	Contract Days
Employment Begin Date	4/26/2004	Employment End Date		Employer Billing Codes
Employment End Reason		Days Worked > Zero Flag	Yes	Days Worked > Zero Flag
Increment Date		Employer Paid EECOM	Yes	Employer Paid EECOM

Michigan New Hire Report

Human Resources > State Requirements > MI > New Hire Report

A **Rehire/Recall Employment Information** section and **Employee Status Event** multi-select list boxes have been added to the [Michigan New Hire Report page](#).



The **Rehire/Recall Employment Information** section contains an *Effective From Date* and an *Effective Through Date*. Employees who have not been paid in the last 60 days before being paid as rehired or recalled employees within the effective date range selected will appear on the report.

Select the employee status events to be included on the report by moving them from the **Employee Status Event** *Available* list box to the *Selected* list box. For every status event selected, the report will include the employees who had an employment effective date within the date range selected, were paid within the same date range and were not paid at least 60 days prior.

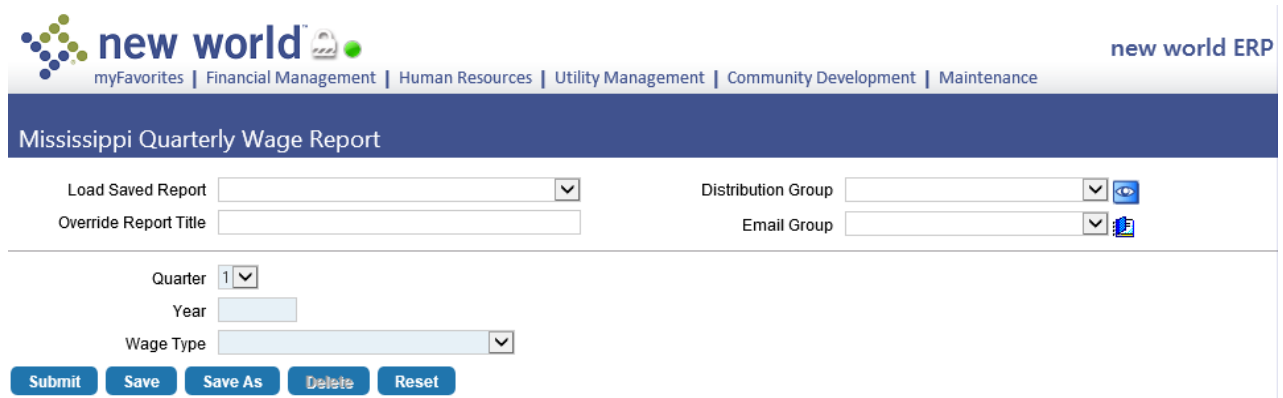
The available status events come from validation set **368-Employee Status Event** (Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List).

The print function has been enhanced to create the transmittal file automatically, so the *Create Transmittal* check box has been removed from the Michigan New Hire Report page.

Mississippi Quarterly Wage Report

Human Resources > State Requirements > MS > Quarterly Wage Report

The **Quarterly Wage Report** has been added to the Mississippi State Requirements menu. Use this option to generate a report and transmittal file of quarterly wage information to be filed with the state of Mississippi each quarter. Wage information is based on check date.



The screenshot shows the 'Mississippi Quarterly Wage Report' form. At the top, there's a navigation bar with 'new world ERP' and links to 'myFavorites', 'Financial Management', 'Human Resources', 'Utility Management', 'Community Development', and 'Maintenance'. The form title 'Mississippi Quarterly Wage Report' is displayed in a blue header. Below the title, there are several input fields: 'Load Saved Report' (a dropdown menu), 'Override Report Title' (a text box), 'Distribution Group' (a dropdown menu with a blue-eye icon), and 'Email Group' (a dropdown menu with a blue-eye icon). Below these fields, there are 'Quarter' (a dropdown menu with '1' selected), 'Year' (a text box), and 'Wage Type' (a dropdown menu). At the bottom of the form, there are five buttons: 'Submit', 'Save', 'Save As', 'Delete', and 'Reset'.

Fields

Field	Description
<i>Load Saved Report</i>	Saves this version of the report as a template for later use. When you click Save , a dialog will ask you to name the report. Type the name, and click OK . The next time you want to run this report, select its name from the Load Saved Report drop-down, and the fields will be populated automatically. If necessary, you may edit entries before running the report. You may save as many templates as you would like.
<i>Override Report Title</i>	Overrides the default report title, (Mississippi Quarterly Wage Report).
<i>Distribution Group</i>	A group of people selected to receive the report in myReports. Click in the field to select from a list of existing groups, or click the blue-eye prompt  to create a new distribution group. The report will be sent to myReports for each person in the group.
<i>Email Group</i>	A group of people selected to receive the report by e-mail. Click in the field to select from a list of existing groups. To create a new e-mail group, click  .

Field	Description
<i>Quarter</i>	Required. Identifies the fiscal quarter being reported. The available selections are 1 (Jan.-Mar.), 2 (Apr.-June), 3 (July-Sept.) and 4 (Oct.-Dec.).
<i>Year</i>	Required. Identifies the year of the fiscal quarter being reported. Type all four digits of the year. The current year is the default.
<i>Wage Type</i>	Required. Tax code set up for quarterly wages. Click in the field to select from a drop-down of available codes. The drop-down includes all tax codes, regardless of active date or status. The gross will be taken from the selected tax. All employees who have the wage type selected during the quarter selected are eligible.

After making your entries, click **Submit** to generate and display the report. A transmittal file of the report data also will be sent to myReports. If you want to submit a PDF of the report data to myReports, click the **Send to myReports** button, located in the top-right corner of the report display.

On the report output, the quarter and year reported display directly below the report title. The report body is sorted alphabetically by *Employee Name* and contains the following columns of information:

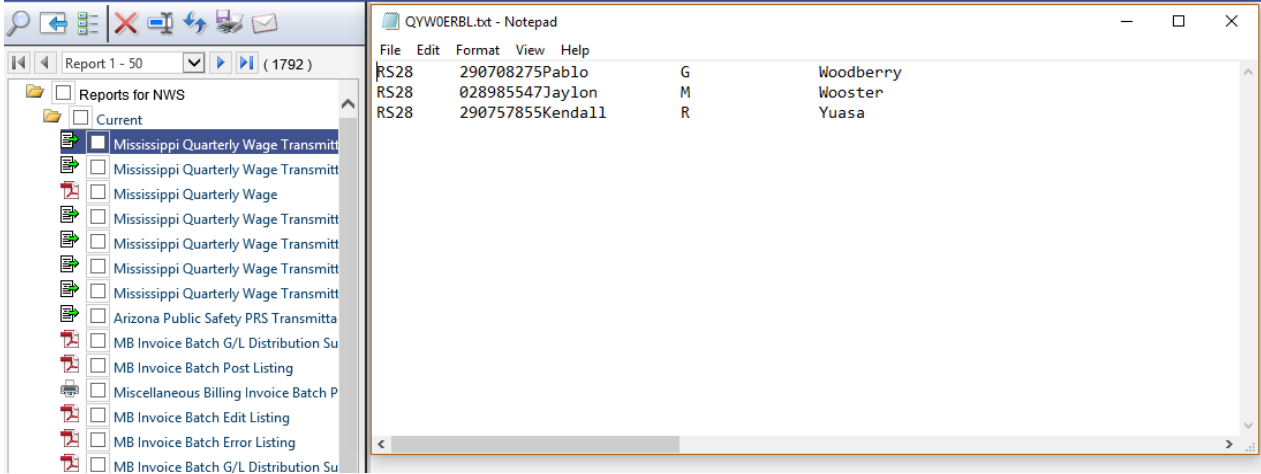
- » *Employee Name*
- » *SSN*
- » *Reporting Wages* (If SUTA is used, the amount equals gross + excess wages)

Sample Report Output

Mississippi Quarterly Wage - Internet Explorer		
 Mississippi Quarterly Wage Fourth Quarter, 2017 Wage Type FICA		
Employee	SSN	Reporting Wages
23 Woodberry, Pablo G	290-70-8275	3,087.40
3672 Wooster, Jaylon M	028-98-5547	4,389.54
2066 Yuasa, Kendall R	290-75-7855	3,534.92
Total Employees 3		<u>\$11,011.86</u>
Run by NWS on 10/30/2017 08:03:57 AM		
Page 1 of 1		

Sample Transmittal File

Mississippi Quarterly Wage Report
 myReports



File	Edit	Format	View	Help
RS28	290708275Pab1o	G	Woodberry	
RS28	028985547Jay1on	M	Wooster	
RS28	290757855Kenda11	R	Yuasa	



Note: A **Mississippi Quarterly Wage Report security component** exists for this option. Navigate to Maintenance > new world ERP Suite > Security > Users, give permission to each user who should have access to this option, and click **SAVE** to retain the settings. The new authorization takes effect once the user has logged off and back on to the system.

 myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance new world ERP 2017.1 HF DEV

User List
User Permissions - NWS

Filter

Search Security Components

x

Applications x

Feature Groups x

Permissions x

Permissions

☐ Security Component	Full	Add	Change	Delete	View	Print	Administrator
☐ Mississippi Quarterly Wage Report	☒					☒	
☐ Mississippi Retirement List	☒	☒	☒	☒	☒	☒	☒
☐ Mississippi System Settings Maintenance	☒		☒		☒	☒	

SAVE USER SECURITY INHERIT

☒ User specific ☒ Template overridden ☒ Template rule

Nevada PERS

Nevada PERS reporting has been enhanced in the following areas:

Create Nevada PERS Data

Human Resources > State Requirements > NV > Create Nevada PERS Data

Agency Number

An Agency Number field has been added to the [Create Nevada PERS Data page](#).

 myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance new world ERP

Create Nevada PERS Data

Data Selection

From Check Date 

To Check Date 



Affecting Period

Month/Year /

Create Reset

Date Defaults

Pay Period Begin Date 

Pay Period End Date 

Number of Pay Periods

When creating data for the Nevada PERS Report and transmittal files, use this field to specify the primary agency to be reported.

The data created will be saved to the reporting period.

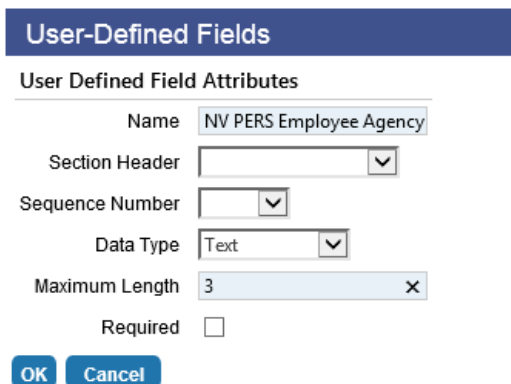
NV PERS Employee Agency UDF

Maintenance > new world ERP Suite > Security > User-Defined Fields

Human Resources > Workforce Administration > Search > Employee Number > Employment tab

A new Workforce Employment user-defined field (UDF), *NV PERS Employee Agency*, will be used to identify employees who are in agencies different from the one specified in the *Agency Number* field. To set up and use this field, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select a *Record Type* of **Employee Employment**.
3. Select a *Maintenance Type* of **Attributes**.
4. Click **New**. The **User-Defined Fields dialog** will open.



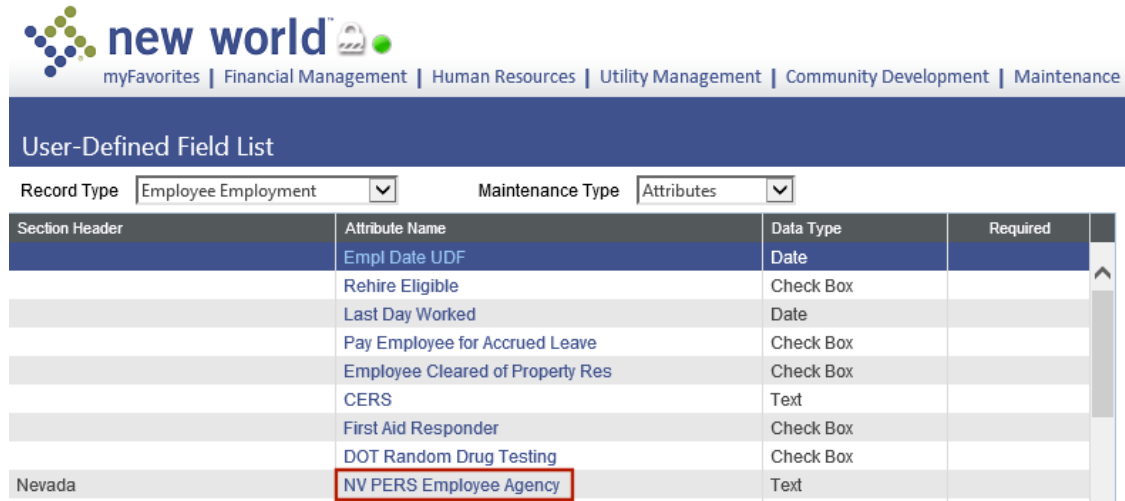
The dialog box is titled "User-Defined Fields" and contains a section titled "User Defined Field Attributes". It includes the following fields:

- Name:** NV PERS Employee Agency
- Section Header:** (dropdown menu)
- Sequence Number:** (dropdown menu)
- Data Type:** Text
- Maximum Length:** 3
- Required:** (checkbox, currently unchecked)

At the bottom are "OK" and "Cancel" buttons.

5. In the *Name* field, type **NV PERS Employee Agency**.
6. Select a *Section Header* if you have created one for Nevada PERS UDFs to appear under; otherwise, leave the field blank.
7. If you want the field to appear in a certain spot in the list of other Nevada PERS UDFs, select a *Sequence Number*; otherwise, leave the field blank.
8. In the *Data Type* field, select **Text**.
9. In the *Maximum Length* field, type **3**.
10. Click **OK**. The new Workforce Employment *NV PERS Employee Agency* UDF should

appear in the **grid** on the User-Defined Field List page.



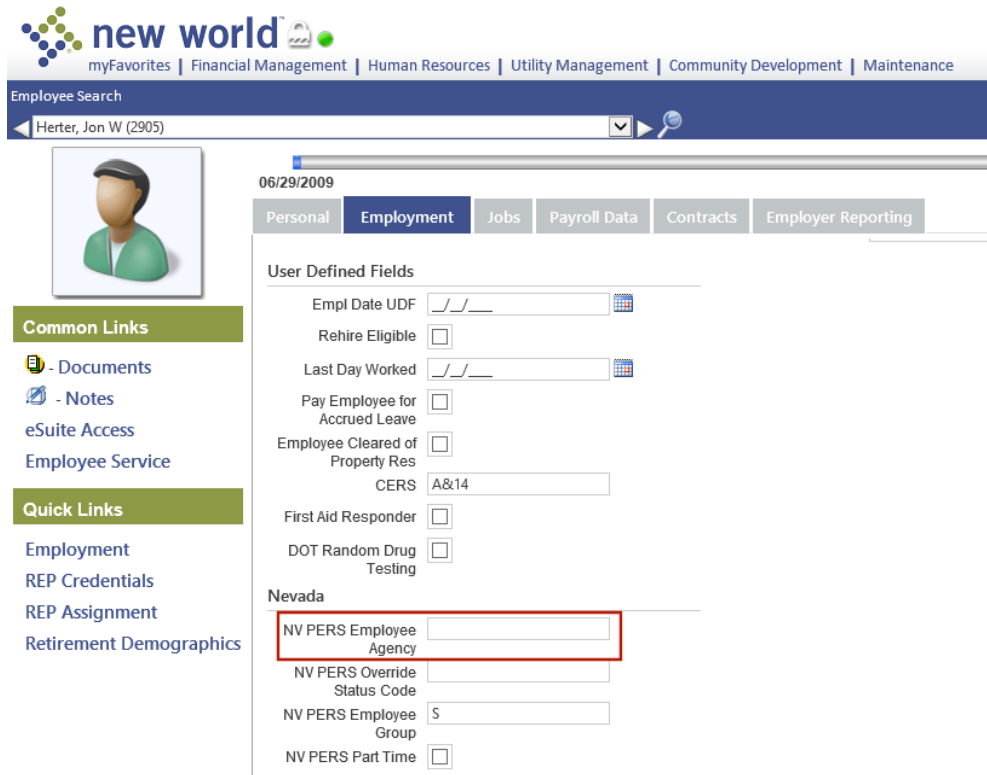
User-Defined Field List

Record Type: Maintenance Type:

Section Header	Attribute Name	Data Type	Required
	Empl Date UDF	Date	
	Rehire Eligible	Check Box	
	Last Day Worked	Date	
	Pay Employee for Accrued Leave	Check Box	
	Employee Cleared of Property Res	Check Box	
	CERS	Text	
	First Aid Responder	Check Box	
	DOT Random Drug Testing	Check Box	
Nevada	NV PERS Employee Agency	Text	

To identify an employee with an agency, follow these steps.

1. Navigate to Human Resources > Workforce Administration > Search.
2. Search for the employee.
3. Click the *Employee Number*.
4. Click the **Employment** tab.
5. Type the appropriate agency ID in the **NV PERS Employee Agency UDF** created in steps 1-10.



new world™
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Employee Search
Herter, Jon W (2905)

06/29/2009

Personal | **Employment** | Jobs | Payroll Data | Contracts | Employer Reporting

User Defined Fields

Empl Date UDF

Rehire Eligible ☐

Last Day Worked

Pay Employee for Accrued Leave ☐

Employee Cleared of Property Res ☐

CERS

First Aid Responder ☐

DOT Random Drug Testing ☐

Nevada

NV PERS Employee Agency

NV PERS Override Status Code

NV PERS Employee Group

NV PERS Part Time ☐

6. Click **Save**.

Employees who have an agency specified in this field will appear under this agency on the Nevada PERS Report, while employees who do not have an entry in this field will appear under the primary agency specified on the Create Nevada PERS Data page.



Note: Due to the addition of the agency number to the create data process, the *Reporting Agency Number* field has been removed from the Nevada PERS Report page.

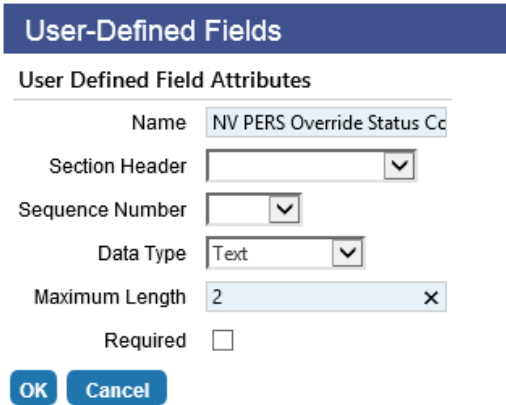
NV PERS Override Status Code

Maintenance > new world ERP Suite > Security > User-Defined Fields

Human Resources > Workforce Administration > Search > Employee Number > Employment tab

For employees who are ineligible for PERS and do not have deduction or benefit contributions but have wages subject to contributions, a new Workforce Employment UDF, *NV PERS Override Status Code*, will be used to allow ineligible employee wages to be reported. To set up and use this field, follow these steps:

1. Navigate to Maintenance > new world ERP Suite > Security > User-Defined Fields. The User-Defined Field List page will open.
2. Select a *Record Type* of **Employee Employment**.
3. Select a *Maintenance Type* of **Attributes**.
4. Click **New**. The **User-Defined Fields dialog** will open.



The dialog box is titled "User-Defined Fields" in a dark blue header. Below the header, the title "User Defined Field Attributes" is displayed. The form contains the following fields and controls:

- Name:** A text input field containing "NV PERS Override Status Co".
- Section Header:** A dropdown menu.
- Sequence Number:** A dropdown menu.
- Data Type:** A dropdown menu with "Text" selected.
- Maximum Length:** A text input field containing "2", with a small "x" icon to its right.
- Required:** A checkbox that is currently unchecked.
- Buttons:** "OK" and "Cancel" buttons at the bottom left.

5. In the *Name* field, type **NV PERS Override Status Code**.
6. Select a *Section Header* if you have created one for Nevada PERS UDFs to appear under; otherwise, leave the field blank.
7. If you want the field to appear in a certain spot in the list of other Nevada PERS UDFs, select a *Sequence Number*; otherwise, leave the field blank.
8. In the *Data Type* field, select **Text**.
9. In the *Maximum Length* field, type **2**.
10. Click **OK**. The new Workforce Employment *NV PERS Override Status Code* UDF should appear in the **grid** on the User-Defined Field List page.

User-Defined Field List

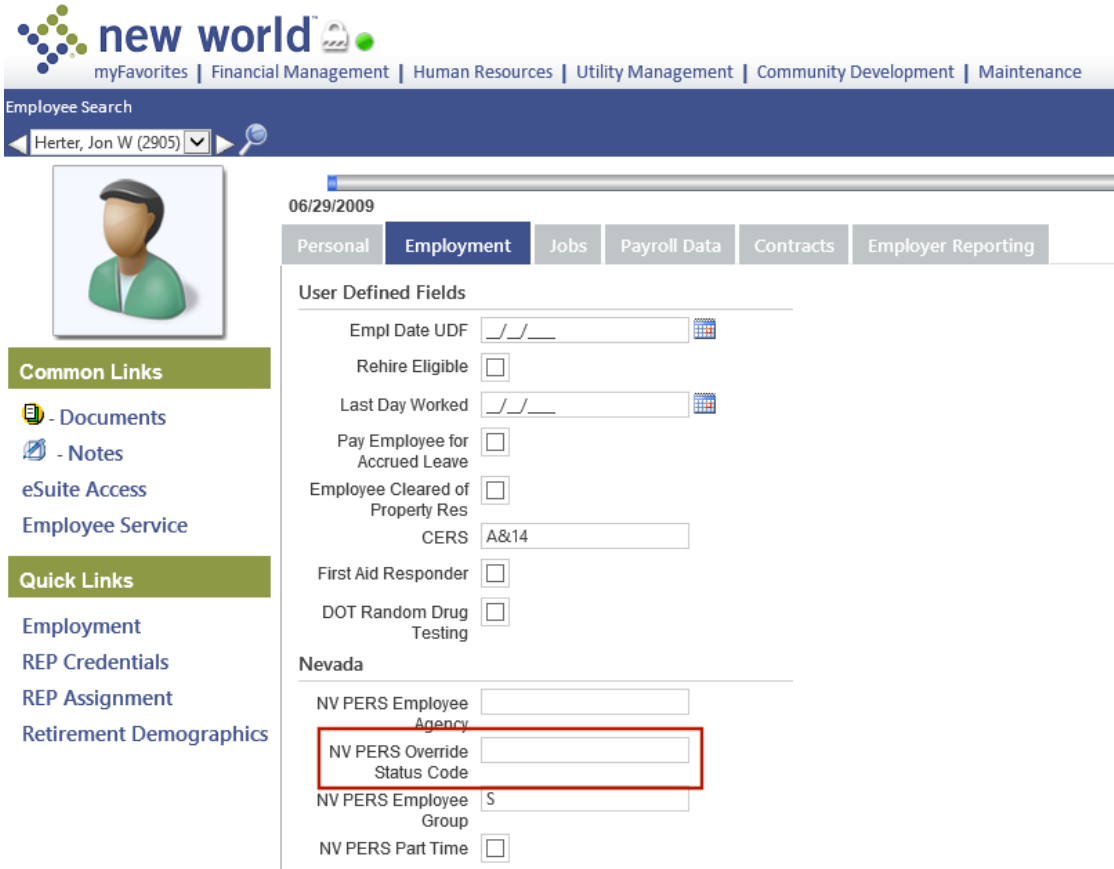
 Record Type

 Maintenance Type

Section Header	Attribute Name	Data Type	Required
	Empl Date UDF	Date	
	Rehire Eligible	Check Box	
	Last Day Worked	Date	
	Pay Employee for Accrued Leave	Check Box	
	Employee Cleared of Property Res	Check Box	
	CERS	Text	
	First Aid Responder	Check Box	
	DOT Random Drug Testing	Check Box	
Nevada	NV PERS Employee Agency	Text	
Nevada	NV PERS Override Status Code	Text	

To identify an ineligible employee whose wages will be reported, follow these steps:

1. Navigate to Human Resources > Workforce Administration > Search.
2. Search for the employee.
3. Click the *Employee Number*.
4. Click the **Employment** tab.
5. Type the appropriate status code in the ***NV PERS Override Status Code UDF*** created in steps 1-10.



The screenshot shows the New World HR system interface. At the top, there's a navigation bar with links: myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance. Below this is an 'Employee Search' bar with a dropdown menu showing 'Herter, Jon W (2905)' and a search icon. The date '06/29/2009' is displayed. The 'Employment' tab is selected, and the 'User Defined Fields' section is visible. The 'NV PERS Override Status Code' field is highlighted with a red box. Other fields include 'Empl Date UDF', 'Rehire Eligible', 'Last Day Worked', 'Pay Employee for Accrued Leave', 'Employee Cleared of Property Res', 'CERS', 'First Aid Responder', and 'DOT Random Drug Testing'. The 'Nevada' section includes 'NV PERS Employee Agency', 'NV PERS Employee Group', and 'NV PERS Part Time'.

Ineligible employees are reported with a status code of **80** or **81**. An entry in this field overrides the status code from earnings.

Nevada PERS Report and Transmittal Files

Human Resources > State Requirements > NV > Nevada PERS List > Print

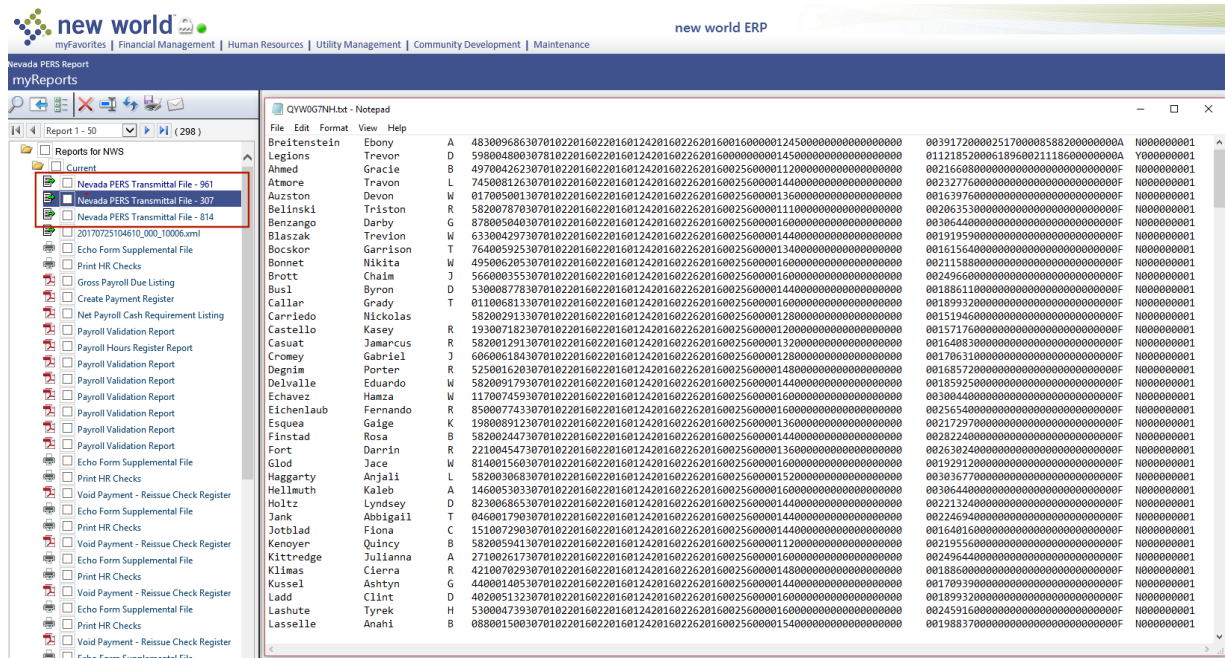
Human Resources > State Requirements > NV > Nevada PERS Report

The **Nevada PERS Report** has been modified to sort by *Agency Number*, followed by *Employee Group*.

Nevada PERS Report													
Report Due 2 / 2016													
Last Name	First Name	MI	SSN	Report MTH/YR	From Date	To Date	Base Hours	Actual Hours	Status Code	Actual Wages	Employer Paid Amount	Employer Amount	Employee Amount
Agency Number 307													
Employee Group A													
BBB	Lucy	W	582-00-0300	2 / 2016	01/24/2016	02/26/2016	160.0000	158.5000	01	3,721.77	.00	640.94	187.85
Breitenstein	Ebony	A	483-00-9686	2 / 2016	01/24/2016	02/26/2016	160.0000	124.5000	01	3,917.20	.00	858.82	251.70
Legions	Trevor	D	598-00-4800	2 / 2016	01/24/2016	02/26/2016	.0000	145.0000	81	11,218.52	.00	2111.86	618.96
Employee Group A Totals							320.0000	428.0000		\$18,857.49	\$0.00	\$3,611.62	\$1,058.51
Employee Group F													
Ahmed	Gracie	B	497-00-4262	2 / 2016	01/24/2016	02/26/2016	256.0000	112.0000	01	2,166.08	.00	.00	.00
Atmore	Travon	L	745-00-8126	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	2,327.76	.00	.00	.00
Auzston	Devon	W	017-00-5001	2 / 2016	01/24/2016	02/26/2016	256.0000	136.0000	01	1,639.76	.00	.00	.00
Belinski	Triston	R	582-00-7870	2 / 2016	01/24/2016	02/26/2016	256.0000	111.0000	01	2,063.53	.00	.00	.00
Benazago	Darby	G	878-00-5040	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	3,064.40	.00	.00	.00
Blaszak	Trevion	W	633-00-4297	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	1,919.59	.00	.00	.00
Bocskor	Garrison	T	764-00-5925	2 / 2016	01/24/2016	02/26/2016	256.0000	134.0000	01	1,615.64	.00	.00	.00
Bonnet	Nikita	W	495-00-6205	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	2,115.88	.00	.00	.00
Brott	Chaim	J	566-00-0355	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	2,496.60	.00	.00	.00
Busi	Byron	D	530-00-8778	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	1,886.11	.00	.00	.00
Callar	Grady	T	011-00-6813	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	1,899.32	.00	.00	.00
Carriedo	Nickolas	W	582-00-2913	2 / 2016	01/24/2016	02/26/2016	256.0000	128.0000	01	1,519.46	.00	.00	.00
Castello	Kasey	R	193-00-7182	2 / 2016	01/24/2016	02/26/2016	256.0000	120.0000	01	1,571.76	.00	.00	.00
Casuat	Jamarcus	R	582-00-1291	2 / 2016	01/24/2016	02/26/2016	256.0000	132.0000	01	1,640.83	.00	.00	.00
Cromey	Gabriel	J	606-00-6184	2 / 2016	01/24/2016	02/26/2016	256.0000	128.0000	01	1,706.31	.00	.00	.00
Degnim	Porter	R	525-00-1620	2 / 2016	01/24/2016	02/26/2016	256.0000	148.0000	01	1,685.72	.00	.00	.00
Delvalle	Eduardo	W	582-00-9179	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	1,859.25	.00	.00	.00
Echavez	Hamza	W	117-00-7459	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	3,004.40	.00	.00	.00
Eichenlaub	Fernando	R	850-00-7743	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	2,565.40	.00	.00	.00
Esquea	Gaige	K	198-00-8912	2 / 2016	01/24/2016	02/26/2016	256.0000	136.0000	01	2,172.97	.00	.00	.00
Finstad	Rosa	B	582-00-2447	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	2,822.40	.00	.00	.00
Fort	Darrin	R	221-00-4547	2 / 2016	01/24/2016	02/26/2016	256.0000	136.0000	01	2,630.24	.00	.00	.00
Glod	Jace	W	814-00-1560	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	1,929.12	.00	.00	.00
Haggarty	Anjali	L	582-00-3068	2 / 2016	01/24/2016	02/26/2016	256.0000	152.0000	01	3,036.77	.00	.00	.00
Hellmuth	Kaleb	A	146-00-5303	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	3,064.40	.00	.00	.00
Holtz	Lyndsey	D	823-00-6865	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	2,213.24	.00	.00	.00
Jank	Abbigail	T	046-00-1790	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	2,246.94	.00	.00	.00
Jotblad	Fiona	C	151-00-7290	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	1,640.16	.00	.00	.00
Kenoyer	Quincy	B	582-00-5941	2 / 2016	01/24/2016	02/26/2016	256.0000	112.0000	01	2,195.56	.00	.00	.00
Kittredge	Julanna	A	271-00-2617	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	2,496.44	.00	.00	.00
Kimas	Cierra	R	421-00-7029	2 / 2016	01/24/2016	02/26/2016	256.0000	148.0000	01	1,886.00	.00	.00	.00
Kussel	Ashtyn	G	440-00-1405	2 / 2016	01/24/2016	02/26/2016	256.0000	144.0000	01	1,709.39	.00	.00	.00
Ladd	Clint	D	402-00-5132	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	1,899.32	.00	.00	.00
Lashute	Tyrek	H	530-00-4739	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	2,459.16	.00	.00	.00
Lasselle	Anahi	B	088-00-1500	2 / 2016	01/24/2016	02/26/2016	256.0000	154.0000	01	1,988.37	.00	.00	.00
Linkovich	Leonel	M	042-00-6508	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	3,465.48	.00	.00	.00
Lovan	Elliot	P	621-00-6225	2 / 2016	01/24/2016	02/26/2016	256.0000	120.0000	01	2,343.18	.00	.00	.00
McBurnie	Anton	W	689-00-9356	2 / 2016	01/24/2016	02/26/2016	256.0000	160.0000	01	2,639.40	.00	.00	.00
Mcchriston	Porter	D	026-00-7692	2 / 2016	01/24/2016	02/26/2016	256.0000	131.5000	01	1,561.01	.00	.00	.00
Medi	Garett	R	849-00-0874	2 / 2016	01/24/2016	02/26/2016	256.0000	136.0000	01	2,553.74	.00	.00	.00
Mont	Kaylee	A	647-00-1847	2 / 2016	01/24/2016	02/26/2016	256.0000	156.0000	01	2,043.29	.00	.00	.00

Grand totals are provided for each agency.

If *Create Transmittal File* is selected when the Nevada PERS Report is run, **separate transmittal files** are created in myReports for each agency. The agency number is appended to the file link.



The screenshot shows the 'new world ERP' interface. The left sidebar contains a 'myReports' section with a tree view. Under 'Reports for NWS', 'Nevada PERS Transmittal File - 307' is selected. The main window displays a list of employees and their corresponding PERS data. The data is organized into columns: Employee Name, ID, and PERS Data. The employees listed include Breitenstein, Legions, Ahmed, Tramon, Auzston, Bellinsk1, Benzango, Blasak, Bloskor, Bonnet, Brot, Busi, Byron, Grady, T, Carriedo, Nickolas, Castillo, Kasey, Casut, Jamarcus, Cromey, Degen, Porter, Delvalle, Eduardo, Hamza, Echavez, Fernando, Elchenlaub, Gaige, Rosa, Darrin, Jace, Haggarty, Anjali, Hellmuth, Kaleb, Lyndsey, Abigail, Jank, Fiona, Kenoyer, Quincy, Kittredge, Julianna, Klimas, Cierra, Kussel, Ashtyn, Ladd, Clint, Lashute, Tyrek, Lasselle, Anahi, and B.

Nevada PERS Pay Period History

Human Resources > State Requirements > NV > Nevada PERS Pay Period History

Nevada PERS Pay Period History has been added to the Nevada State Requirements menu to allow the viewing and, if necessary, correction of past reporting periods.



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Nevada PERS Pay Period History List

Affected Reporting Period	From Check Date	To Check Date	Pay Period Start Date	Pay Period End Date
Add new row				
10/2001	10/5/2001	10/20/2001	10/5/2001	10/20/2001
11/2001	11/1/2001	11/30/2001	11/1/2001	11/30/2001
01/2015	1/1/2015	1/31/2015	1/1/2015	1/31/2015
02/2016	2/1/2016	2/28/2016	1/24/2016	2/26/2016
11/2016	11/1/2016	11/30/2016	10/28/2016	11/27/2016
01/2017	12/25/2016	1/21/2017	12/25/2016	1/21/2017
06/2017	6/10/2017	6/11/2017	6/10/2017	6/11/2017
07/2017	7/6/2017	7/7/2017	7/6/2017	7/7/2017

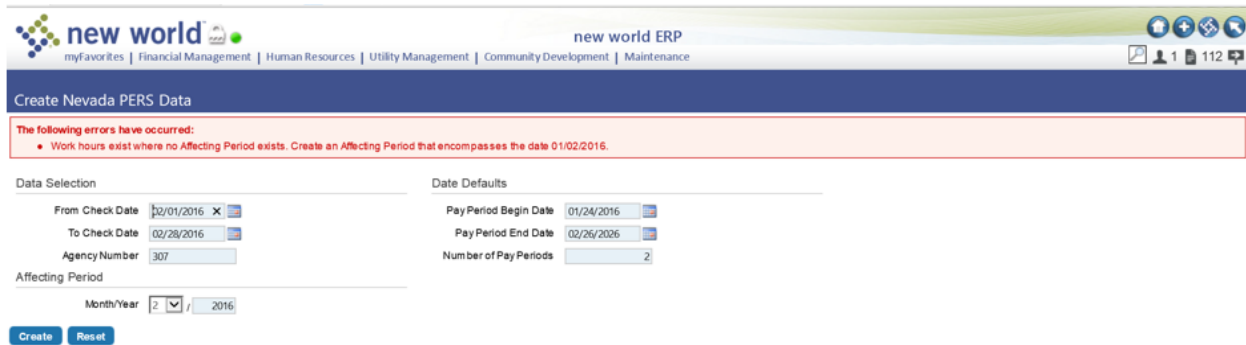
Each time the Create Nevada PERS Data process is run, a row containing the affected reporting period, check date range and pay period date range will be added to the grid on this page.

If an error is received during the create data process, this grid may be edited to resolve the error.

Example One

During the create data process, the following error is received:

"Work hours exist where no Affecting Period exists. Create an Affecting Period that encompasses the date 01/02/2016."



The create data process pulls earnings based on check dates. Earnings are reported to a specific month and year (*Affecting Period Month/Year*). The selected pay period range may include work days outside the period being reported.

The error shown above occurred because the work date of 01/02/2016 was not found in any of the existing pay periods; for example, a new customer may have run a retro process that included work dates before Nevada PERS was first run in new world ERP.

Example Two

During the create data process, the following error is received:

"End Date overlaps existing records."



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Create Nevada PERS Data

The following errors have occurred:

- End Date overlaps existing records.

Data Selection

From Check Date 
To Check Date 
Agency Number

Affecting Period

Month/Year /

Create

Reset

Date Defaults

Pay Period Begin Date 
Pay Period End Date 
Number of Pay Periods

This error occurs because pay period dates overlap. The date 11/27/2016 is being reported in period 12/2016 on the Create Nevada PERS Data page and in period 11/2016 on the [Nevada PERS Pay Period History List page](#).



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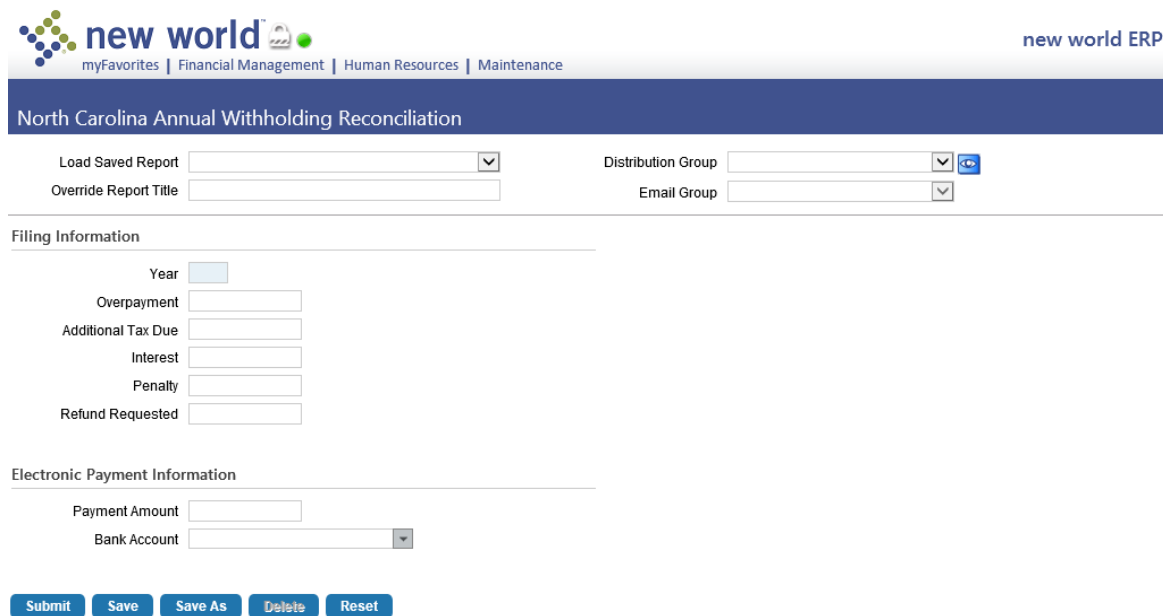
Nevada PERS Pay Period History List

Affected Reporting Period	↑	✱	From Check Date	✱	To Check Date	✱	Pay Period Start Date	✱	Pay Period End Date	✱
+ Add new row										
10/2001			10/5/2001		10/20/2001		10/5/2001		10/20/2001	
11/2001			11/1/2001		11/30/2001		11/1/2001		11/30/2001	
01/2015			1/1/2015		1/31/2015		1/1/2015		1/31/2015	
01/2016			1/1/2016		1/31/2016		1/1/2016		1/23/2016	
02/2016			2/1/2016		2/28/2016		1/24/2016		2/26/2016	
11/2016			11/1/2016		11/30/2016		10/28/2016		11/27/2016	
01/2017			12/25/2016		1/21/2017		12/25/2016		1/21/2017	
06/2017			6/10/2017		6/11/2017		6/10/2017		6/11/2017	
07/2017			7/6/2017		7/7/2017		7/6/2017		7/7/2017	

North Carolina Annual Withholding Reconciliation

Human Resources > State Requirements > NC > Annual Withholding Reconciliation

An **Annual Withholding Reconciliation** option has been added to the North Carolina State Requirements menu. Use this option to generate the North Carolina Annual Withholding Reconciliation reports and transmittal file.



The screenshot shows the 'North Carolina Annual Withholding Reconciliation' form. At the top, there is a navigation bar with 'new world ERP' and links for 'myFavorites', 'Financial Management', 'Human Resources', and 'Maintenance'. Below this is a header for the specific form. The form contains several input fields and dropdown menus:

- Load Saved Report**: A dropdown menu.
- Override Report Title**: A text input field.
- Distribution Group**: A dropdown menu with a help icon.
- Email Group**: A dropdown menu.

Below these fields are two sections:

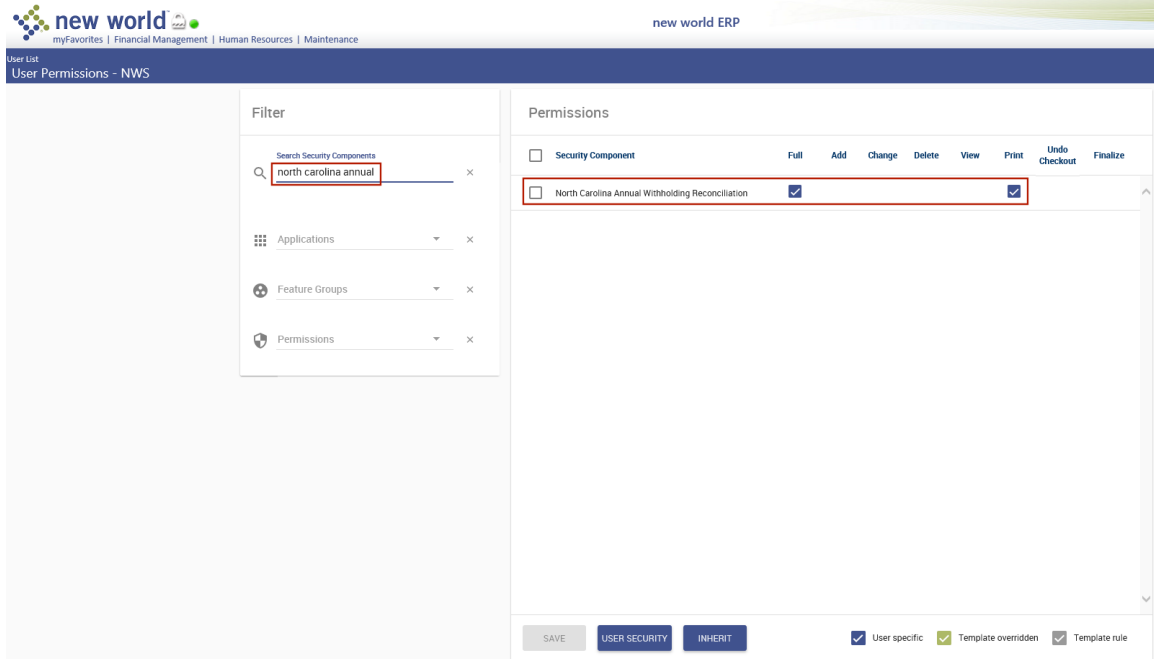
- Filing Information**: Contains fields for 'Year', 'Overpayment', 'Additional Tax Due', 'Interest', 'Penalty', and 'Refund Requested'.
- Electronic Payment Information**: Contains fields for 'Payment Amount' and 'Bank Account'.

At the bottom of the form, there are five buttons: 'Submit', 'Save', 'Save As', 'Delete', and 'Reset'.

Permissions

For the option to appear on the menu, each user needs permission to a new security component, **North Carolina Annual Withholding Reconciliation**.

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page opens.
2. Select the user's row.
3. Click **Permissions**. The User Permissions page opens, containing a grid of security components and a filter panel.
4. In the *Search Security Components* filter, type Indiana **North Carolina Annual** (the entry is not case sensitive). The grid refreshes to contain the **North Carolina Annual Withholding Reconciliation security component** only.



new world ERP

User List
User Permissions - NWS

Filter

Search Security Components
north carolina annual

Applications

Feature Groups

Permissions

Permissions

Security Component Full Add Change Delete View Print Undo Checkout Finalize

North Carolina Annual Withholding Reconciliation

SAVE USER SECURITY INHERIT

User specific Template overridden Template rule

5. Select *Full* permission.
6. Click **Save**.
7. For the permission to take effect, the user needs to log off and log back onto the system.

North Carolina Annual Withholding Reconciliation

To generate the North Carolina Annual Withholding Reconciliation reports and transmittal file, navigate to Human Resources > State Requirements > NC > **Annual Withholding Reconciliation**.

North Carolina Annual Withholding Reconciliation

 Load Saved Report
 Override Report Title

 Distribution Group
 Email Group

Filing Information

 Year
 Overpayment
 Additional Tax Due
 Interest
 Penalty
 Refund Requested

Electronic Payment Information

 Payment Amount
 Bank Account

In the output generated, tax amounts withheld for the year are compared with tax amounts reported on W-2s.

If W-2s have not been created when you run this option, a message will alert you.

The only required entry is *Year*. The remaining fields are override fields.

We recommend that you first run the reports and transmittal file with only the *Year* filled in, then review the results to determine whether adjustments need to be made using the override fields or W-2s need to be recreated and the reports and transmittal file re-run.

If the reports show an underpayment condition and you will make installment payments using the transmittal file, you may use the *Payment Amount* field to fill in the amount being paid. Use the *Bank Account* field to select the account from which payment will be made. The *Bank Account* drop-down contains the list of accounts to which you have access. It is the same field you see when processing an accounts payable or payroll payment batch.

After making your selections on this page, click **Submit**. The North Carolina Annual Withholding Reconciliation Summary, North Carolina Annual Withholding Reconciliation Detail and North Carolina Annual Withholding Reconciliation Transmittal files will be generated and sent to *myReports*.

North Carolina Annual Withholding Reconciliation Summary

Wisconsin Retirement System (WRS) Reporting

Human Resources > State Requirements > WI > System Settings Maintenance

Human Resources > State Requirements > WI > Retirement List

Wisconsin Retirement System (WRS) Reporting has been enhanced with the addition of a System Settings Maintenance page and improvements to the processes of setting up, creating, maintaining and transmitting retirement data.


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new world ERP

System Settings Maintenance

Company Settings

WRS Settings

WRS Reporting

Employer ID 123456
Billing Location ID 987605
Coverage Effective Date Hire Date
Employer Contribution Date Employer Cont Date
Work Status Stop Code TS - Termination - Work Status Change
Job Category Stop Code TC - Termination - Category Change

WRS Non-Standard Pay Rate

Include Longevity
Include Certification
Include Special Assignment

Subject to Hours Adjustment

Available Benefit Groups: 0

Selected Benefit Groups: 12

100 - NON-REPRESENTED
110 - ELECTED OFFICIALS
150 - BOARDS
160 - NO BENEFIT GROUP
170 - WRS BENEFIT ONLY
200 - COURTHOUSE WCI UNION
300 - LAW ENFORCEMENT
350 - CORRECTIONS
370 - TELECOMMUNICATORS
400 - HIGHWAY
500 - RECORDS CLERK
900 - LAKEVIEW

Pay Groups

Pay Group	Report Cycle Type
A - Adjustments	
B - B	B00 - Bi-Weekly
Jims Group - Jims Group	B00 - Bi-Weekly
M - M	M00 - Monthly
MAN - Manual	
WEEK - Weekly	W00 - Weekly

Status Events

Employment Status	Status Change Type	Contract Change	Last Pay Date Required
Active - Active	AE - Active Employment	☐	☐
FMLA - FMLA	UF - Unpaid Leave - FMLA	☐	☒
INV - Involuntary	UC - Unpaid Leave - Miscellaneous	☐	☒
M - Military	OE - Occasional Active Employment	☐	☐
NH - New Hire	AE - Active Employment	☒	☐
Paid WC - Paid Workers Comp Leave	PW - Paid Leave - Workers Compensation	☐	☐
RFL - Return From Leave	AE - Active Employment	☐	☐
RH - Rehire	AE - Active Employment	☒	☐
VOL - Voluntary	TD - Termination - Dismissal	☐	☒

Save

Retirement List

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Wisconsin Retirement List

☐	Employee #	Employee Name	↑	✖
	▽ Equals...	▽ Contains...		
☐	562	Abramovitz, Isis J		
☐	291	Acedo, Malia P		
☐	238	Borns, Devin G		
☐	567	Brimmage, Kaitlynn C		
☐	1475	Cislo, Perry A		
☐	1866	Clevinger, Lloyd N		
☐	3162	Der, Tanner E		
☐	1699	Hagaman, Eve W		
☐	623	Montaya, Natalie E		
☐	1677	Tatom, Darrell M		
☐	1575	Tibbit, Laila J		
☐	1194	Vue, Lizeth L		

1 - 12 of 12 records

Create New Print Delete Settings WRS Report

Find details in the [Wisconsin Retirement System Reporting Guide](#).

Workforce Administration

Benefit Plan Detail

Workforce Administration > Search > Employee > Payroll Data > Benefit Plans

In the Benefit Plan Detail section for Health Savings Account (HSA) plans, the *Override* column of the **Plan Cost grid** has been renamed *Employee Contribution*.

Benefit Plans

Category - Plan	Option	Coverage Dates	Payroll Dates	Deduction Amount	Declined	Overridden	Comments	Required
CERS - Non-Haz	Employee Only	07/01/2012 - Open	07/01/2012 - Open	N/A				
Life Insurance - Life Insurance	Employee Only	01/02/2013 - Open	01/02/2013 - Open	\$0.00				
Medical - Plan 750	Employee Only	12/25/2016 - Open	12/25/2016 - Open	\$5.34				
Medical Flex	Employee Only	01/01/2017 - Open	12/25/2016 - Open	N/A	✓			
Vision - Vision	Employee Only	01/01/2017 - Open	12/25/2016 - Open	\$0.00				
Dental - Dental	Employee Only	01/01/2017 - Open	12/25/2016 - Open	\$0.00				
Dependent Care Flex	Employee Only	01/01/2017 - Open	12/25/2016 - Open	\$0.00	✓			
HSA - HSA Plan	Employee Only	01/16/2018 - Open	01/16/2018 - Open	\$38.47				

Benefit Plan Detail

Coverage Start Date: 01/16/2018
Coverage End Date:
Category: HSA
Plan: HSA Plan
Option: Employee Only
Enrollment Date:
Last Used In Payroll: 01/16/2018
Payroll Start Date:
Payroll End Date:
Frequency:
All Checks:
Decline / Reason:
Comments:
Plan Cost:
Rule Set: All HSA: Benefit Date Greater Than or Equal To 01/02/1900
Annual: \$3,500.00
Pay Period:
Bank Account:
Bank: B of I Federal Bank - 264171241
Routing Number: 264171241
Account Type: Savings
Account Number: 3940512-KT

The amount in this column refers to the employee contribution only.

Paperless W-2s and 1095-Cs

Human Resources > Workforce Administration > Search > Employee > Personal > Demographics

Paperless W-2 and *Paperless 1095-C* check boxes have been added to the Demographics section of the employee's Workforce Administration **Personal** tab.

Demographics

Social Security #: 322-00-3221
Date of Birth: 07/13/1978
Date of Death:
Gender: Female
Race: White (Not Hispanic or Latino)
Marital Status: Single
Light Duty:
Disabled:
Pension Number: Y
Vendor:
Paperless 1095-C: ☒
Paperless W-2: ☒
Veteran Information:
Veteran Status:
Military Branch:
Disabled Veteran: ☐
Citizenship:
US Citizen: ☒
Registration Number:
Work To Date:
Admission Number:
Name:
Addresses:
Demographics:
Education:

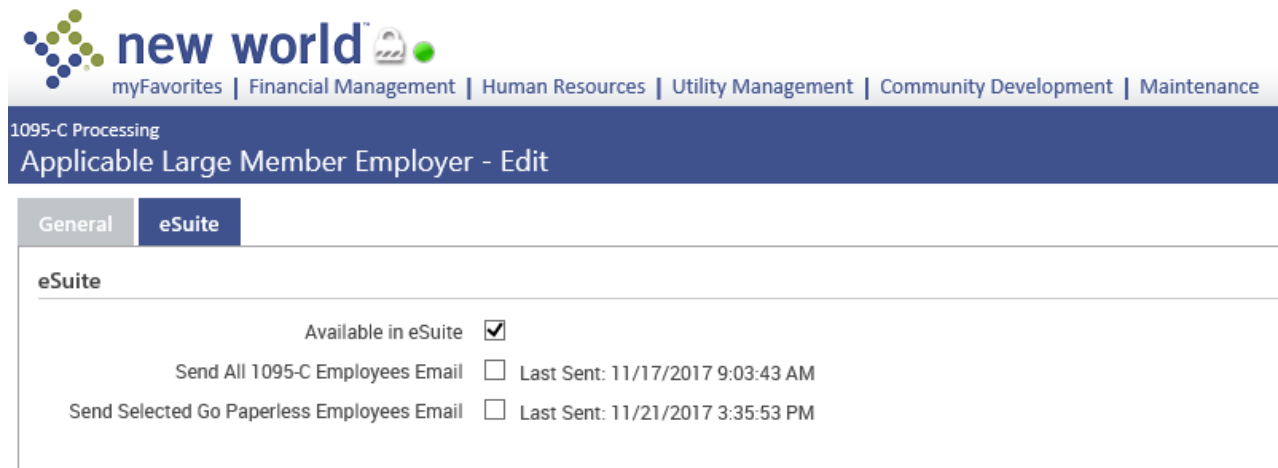
The selections here update the [paperless selections in eSuite](#).

Year-End Processing

Applicable Large Member Employer

Human Resources > Year-End Processing > 1095-C Processing > Applicable Large Employer Member List > EIN > eSuite tab

The [Applicable Large Member Employer Edit page](#) has been divided into two tabs, **General** and **eSuite**. The General tab contains all the information the page contained previously, with the exception of the *Available in eSuite* check box, which appears on the eSuite tab along with the following two check boxes: *Send All 1095-C Employees Email* and *Send Selected Go Paperless Employees Email*.



The screenshot shows the 'new world' logo at the top left, followed by a navigation bar with links: myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance. Below this is a dark blue header with the text '1095-C Processing' and 'Applicable Large Member Employer - Edit'. The page has two tabs: 'General' and 'eSuite', with 'eSuite' being the active tab. Under the 'eSuite' tab, there is a section titled 'eSuite' containing three items: 'Available in eSuite' with a checked checkbox, 'Send All 1095-C Employees Email' with an unchecked checkbox and 'Last Sent: 11/17/2017 9:03:43 AM', and 'Send Selected Go Paperless Employees Email' with an unchecked checkbox and 'Last Sent: 11/21/2017 3:35:53 PM'.

Select *Send All 1095-C Employees Email* to have all employees receive emails informing them of the option in eSuite to have their 1095-Cs delivered electronically.

Select *Send Selected Go Paperless Employees Email* to have all employees who choose the electronic delivery of 1095-Cs receive emails informing them that their 1095-Cs are available in eSuite.

The email templates for these processes are located on the [Email Template Setup page](#) in Maintenance (Maintenance > new world ERP Suiter > System > Email Templates).

Box 9 Verification Code

Human Resources > Year-End Processing > W-2 Processing > Employee

On the **Box1-11, 13** tab of the **W-2 Employee** page, a **Box 9 Verification Code** field replaces the **Box 9 Advance EIC Payments** field.


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 W-2 Employee List

 2017 W-2 Employee - AKINREFON, DOROTHY A

 Employee Information ▾ | **Box 1-11, 13 ▾** | Box 12 ▾ | Box 14 | State Wages ▾ | Local Wages ▾

Box 1 - Box 11		Box 13
Box 1 Wages, Tips	\$4,733.82	Statutory Employee ☐
Box 2 Federal Income Tax	\$756.59	Retirement Plan ☒
Box 3 Social Security Wages		Third-Party Sick Pay ☐
Box 4 Social Security Tax		
Box 5 Medicare Wages and Tips	\$5,344.80	
MQGE Employee	☒	
Box 6 Medicare Tax	\$77.50	
Box 7 Social Security Tips		
Box 8 Allocated Tips		
Box 9 Verification Code		
Box 10 Dependent Care Benefits		
Box 11 Nonqualified Plans		

 Save Save/New Delete Reset

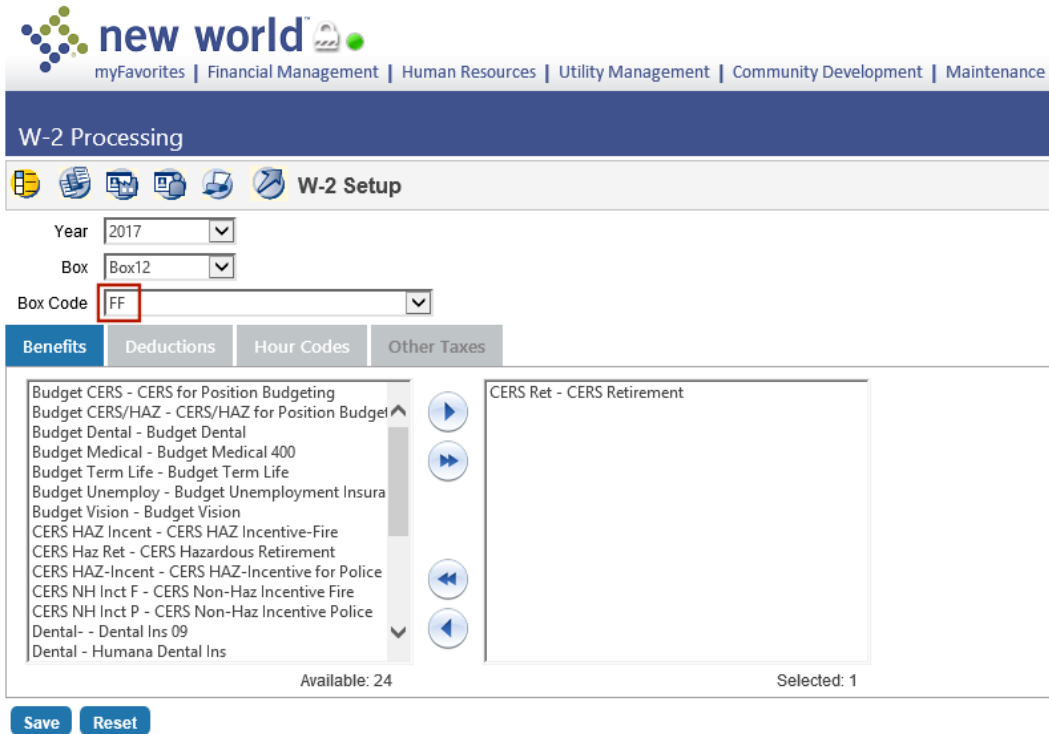
This 16-character code verifies the authenticity of the W-2 data taxpayers submit on e-filed returns. As part of a pilot program implemented to combat tax-related identity theft and refund fraud, the IRS has partnered with certain vendors to include this verification code on many employee W-2 forms; new world ERP, however, is not a selected vendor and will not be filling in the **Box 9 Verification Code** field.

The verification code will not appear on the W-2 Register, but if the field is filled in, it will appear on the W-2 form.

Box 12 Code FF

Human Resources > Year-End Processing > W-2 Processing > W-2 Setup

A new box 12 code FF field, *Permitted Benefits Under a Qualified Small Employer Health Reimbursement Arrangement*, has been added to the W-2 transmittal file. To accommodate this change, **FF** has been added to the Box 12 Box Code drop-down on the **W-2 Setup page**.



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W-2 Processing

W-2 Setup

Year: 2017
Box: Box12
Box Code: FF

Benefits | Deductions | Hour Codes | Other Taxes

Available: 24
Selected: 1

Save Reset

Selecting this code enables the **Benefits**, **Deductions** and **Hours Codes** multi-select list box tabs for selections. The Create W-2 process (Human Resources > Year-End Processing > W-2 Processing > Create W-2 Data) has been updated to total the values from these selections and add the total to the employee's Box 12 FF.

The amount may be edited on the **W-2 Employee page** (Human Resources > Year-End Processing > W-2 Processing > W-2 Employee List > Employee Name > Box 12).

W-2 Employee List

2017 W-2 Employee - AKINREFON, DOROTHY A

Employee Information ▼ | Box 1-11, 13 ▼ | **Box 12 ▼** | Box 14 | State Wages ▼ | Local Wages ▼

Code	Δ	Amount
FF		\$228.15
K		\$410.98

[New](#) [Delete](#) [Refresh](#)[Save](#) [Save/New](#) [Delete](#) [Reset](#)

Click the **FF** code in the grid to open the **W-2 Box 12 dialog** and edit the amount.

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W-2 Employee List

2017 W-2 Employee - AKINREFON, DOROTHY A

Employee Information ▼ Box 1-11, 13 ▼ **Box 12 ▼** Box 14 State Wages ▼ Local Wages ▼

Code	Amount
FF	\$228.15
K	\$410.98

New Delete Refresh

Save Save/New Delete Reset

new world ERP -- Webpage Dialog

W-2 Box 12

Box 12 Code FF ▼

Box 12 Amount \$228.15

OK Cancel

Flint Locality Code

Maintenance > Human Resources > Deductions and Benefits > Taxes > New/Code
 Human Resources > Year-End Processing > W-2 Processing > Create W-2 Transmittal File
 Human Resources > Year-End Processing > W-2 Processing > W-2 Employee List >
 Employee Name > Local Wages > New

If an employee has Michigan state taxes and a *Locality* code of **FL** or **Flint**, an RS record will be created for the city of Flint, Michigan, to match the city's transmittal requirements.

Before W-2s are processed, this code should be set up as an **Other Tax** in Maintenance (Maintenance > Human Resources > Deductions and Benefits > Taxes > New/Code).


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Tax List

Other Tax

Code
 Description
 Last Processed Date NOT USED
 Effective Date
 Start Date

Locality FL

 Type of Tax
 State
 Subtract Federal Tax from Gross ☐
 Annual Limit
 Minimum Annual Gross Pay
 Vendor
 Credit Account
 Exemptions Based on
 Credit Based on

Save
Save/New
Delete
Reset
Copy
Tax Steps

Flint Local also has been added to the *Local Agency Transmittal* drop-down on the **Create W-2 Transmittal File page** in W-2 Processing. If this option is selected and **Michigan** is selected as the *State*, the transmittal file appropriately will contain the **FL** or **Flint** code, depending on how it is named in the *Locality* field of the Other Tax page.

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W-2 Processing

 **Create W-2 Transmittal File**

Tax Year: 2017
EIN: 22-4764762
Transmittal Layout: [Dropdown]

Submitter Information

PIN: 59489465
Name: new world W-2 Company
Location Address: [Text Box]
Delivery Address: 12 MAIN STREET
Zip: 48502
City: FLINT
State: MI - Michigan
Kind of Employer: 501c non-govt
Local Agency Transmittal: Flint Local

Contact Information

Name: Kevin Taylor
Phone: (333)444-5555
Extension: [Text Box]
Email: ktaylor@newworldERP.com
Fax: [Text Box]
Title: HR Administrator

Create **Reset**

If W-2s are processed before the *Locality* code for Flint has been set up, the code may be added manually through the **W-2 Employee Local Wages** tab in W-2 Processing (Human Resources > Year-End Processing > W-2 Processing > W-2 Employee List > Employee Name > Local Wages > New).

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W-2 Employee List

2017 W-2 Employee - AKINREFON, DOROTHY A

Employee Information | Box 1-11, 13 | Box 12 | Box 14 | State Wages | **Local Wages**

Locality Name	Local Wages	Local Income Tax
BG	\$5,429.92	\$100.46
WC	\$5,429.92	\$27.15

new world ERP -- Webpage Dialog

W-2 Local Wages

Box 20 Locality Name: [Text Box]
Box 18 Local Wages: [Text Box]
Box 19 Local Income Tax: [Text Box]
Type of Tax: [Dropdown]
OK **Cancel**

New **Delete** **Refresh** **User Defined**

Save **Save/New** **Delete** **Reset**

W-2 Company

Human Resources > Year-End Processing > W-2 Processing > W-2 Company

An **eSuite** section has been added to the bottom of the **W-2 Company dialog**. The *Available in eSuite* check box has been moved to this section, and the following two check boxes have been added: *Send All W-2 Employees Email* and *Send Selected Go Paperless Email*.

W-2 Company

Tax Year 2017 ▼
 EIN 99887766
 Company Name NEW WORLD ERP
 Location Address SUITE 600
 Delivery Address 888 W. BIG BEAVER
 Zip 48084 ▼
 City TROY
 State MI - Michigan ▼

eSuite
 Available in eSuite ☒
 Send All W-2 Employees Email ☐ Last Sent: Not Sent
 Send Selected Go Paperless Email ☐ Last Sent: 11/21/2017 3:44:22 PM

OK
Cancel

Select *Send All W-2 Employees Email* to have all employees receive emails informing them of the option in eSuite to have their W-2s delivered electronically.

Select *Send Selected Go Paperless Email* to have all employees who choose the electronic delivery of W-2s receive emails informing them that their W-2s are available in eSuite.

The email templates for these processes are located on the [Email Template Setup page](#) in Maintenance (Maintenance > new world ERP Suiter > System > Email Templates).

W-2 Employee List Paperless Column

Human Resources > Year-End Processing > W-2 Processing > W-2 Employee List

A *Paperless* column has been added to the **W-2 Employee List grid** to identify employees who are receiving W-2s electronically and those who are not.

 **new world** City of New World
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Search 

W-2 Processing

W-2 Employee List

Tax Year: 2017
EIN: 61-6001789

Search Reset

Employee Name	Employee Number	Social Security Number	Taxable Wages	Federal Tax	Paperless
Abauza, Destany L	2015	420-00-6714	\$20,613.89	\$2,779.95	✓
ABRAHAMIAN, DAISY T	921	582-00-0413	\$14,018.25	\$2,572.01	✗
Acedo, Malla A	2350	698-00-1489	\$12,611.23	\$0.00	✓
Ackman, Ari M	3228	851-00-7009	\$2,673.43	\$152.32	✗
Adlam, Stone S	3832	501-00-1512	\$722.98	\$23.45	✗
Agueda, Solomon E	1256	569-00-5660	\$25,917.02	\$2,496.53	✗
Agueda, Solomon J	137	355-00-3875	\$25,662.62	\$6,021.34	✗
Aidt, Rigoberto J	3643	576-00-2885	\$24,387.43	\$1,974.87	✗
Ajello, Erin A	2049	441-00-7761	\$29,921.32	\$2,793.41	✓
ALEXANDER, TAYLOR MICHELLE	3929	404-49-7329	\$848.02	\$62.50	✓
Alexandria, Abigale A	3737	217-00-7390	\$1,888.53	\$77.27	✓
Allam, Darien S	2951	582-00-6275	\$23,899.72	\$3,050.58	✓
ALLEN, CELIA ELIZABETH	3946	403-53-1595	\$1,359.23	\$59.92	✗
Allinger, Greta K	3529	582-00-4430	\$764.89	\$28.72	✓
ALLISON, MASON WARD	3931	401-59-7286	\$1,707.06	\$163.04	✗
ALLISON, OWEN NEAL	3932	401-54-8204	\$1,729.80	\$166.44	✗
Almendarez, Axel E	3320	296-00-3256	\$5,139.97	\$429.10	✗
Altobelli, Anaya F	2318	582-00-3788	\$21,831.36	\$2,765.61	✗
Ampy, Claudia C	3369	801-00-1434	\$7,465.12	\$313.95	✗
Anasagasti, Aiyana M	2610	504-00-2566	\$7,046.14	\$184.59	✗
Anderman, Pierre J	3906	365-00-0586	\$2,009.70	\$103.63	✗
Andrzejewski, Roman M	3418	751-00-7730	\$609.06	\$30.47	✗

1 - 50 of 728 records

New Delete Print

The column is populated based on whether employees have the *Paperless W-2* check box selected in the **Demographics** section of the Workforce Administration **Personal** tab.

 **new world** City of New World
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search 

Employee Search

Allinger, Greta K (3529)

05/05/2014

Personal Employment Jobs Payroll Data Employer Reporting

Edit Demographics

Social Security # 582-00-4430 Marital Status Married

Date of Birth 05/20/1984 Light Duty ✗

Date of Death Disabled ✗

Gender Female Pension Number

Race White (Not Hispanic or Latino) Vendor

Paperless 1095-C ✗ Paperless W-2 ✓

Veteran Information Citizenship

Veteran Status US Citizen ✓

Military Branch Registration Number

Disabled Veteran ✗ Work To Date

Admission Number

Common Links

- Documents
- Notes
- eSuite Access
- Employee Service

Quick Links

- Name
- Addresses
- Demographics
- Education
- Email Addresses

Employees who have the check box selected show a green check mark ; employees who have it deselected show a red . By default, the column shows both. To filter the column to show one or the other, click the **filter** icon at the top of the column and select **Yes** () or **No** (). To show both, select **Clear Filter**.

 **new world**  City of New World

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Search 

W-2 Processing

W-2 Employee List

Tax Year

EIN

Search

Employee Name	Employee Number	Social Security Number	Taxable Wages	Federal Tax	Paperless
▼ Contains...	▼ Equals...	▼ Contains...	▼ Contains...	▼ Contains...	▼ Contains...
Abaunza, Destany L	2015	420-00-6714	\$20,613.89	\$2,779.95	
ABRAHAMIAN, DAISY T	921	582-00-0413	\$14,018.25	\$2,572.01	
Acedo, Malia A	2350	698-00-1489	\$12,611.23	\$0.00	
Ackman, Ari M	3228	851-00-7009	\$2,673.43	\$152.32	
Adlam, Stone S	3832	501-00-1512	\$722.98	\$23.45	
Agueda, Solomon E	1256	569-00-5660	\$25,917.02	\$2,496.53	
Agueda, Solomon J	137	355-00-3875	\$25,662.62	\$6,021.34	
Aidt, Rigoberto J	3643	576-00-2885	\$24,387.43	\$1,974.87	
Ajello, Erin A	2049	441-00-7761	\$29,921.32	\$2,793.41	
ALEXANDER, TAYLOR MICHELLE	3929	404-49-7329	\$848.02	\$62.50	
Alexandria, Abigale A	3737	217-00-7390	\$1,888.53	\$77.27	
Allam, Darien S	2951	582-00-6275	\$23,899.72	\$3,050.58	
ALLEN, CELIA ELIZABETH	3946	403-53-1595	\$1,359.23	\$59.92	
Allinger, Greta K	3529	582-00-4430	\$764.89	\$28.72	

Clear Filter is the default selection.

W-2 Register

Human Resources > Year-End Processing > W-2 Processing > W-2 Employee List > Print

The W-2 Register Detail and W-2 Register User Adjustments reports have been updated to show **Box 12 FF** data.

W-2 Register Detail

W-2 Register

Tax Year

EIN

Report Type

Sort By

new world ERP			
W-2 Register (User Adjustments)			
Tax Year: 2017			
Type	Original Amount	Current Amount	Difference
Employee Name: AKINREFON, DOROTHY A - 919 SSN: 322-00-3221			
Box 12 FF	0	228.15	228.15
User Adjustments Totals			
Box Name	Original Amount	Current Amount	Difference
Box 1 Wages, Tips	\$0.00	\$0.00	\$0.00
Box 2 Federal Income Tax	\$0.00	\$0.00	\$0.00
Box 3 Social Security Wages	\$0.00	\$0.00	\$0.00
Box 4 Social Security Tax	\$0.00	\$0.00	\$0.00
Box 5 Medicare Wages and Tips	\$0.00	\$0.00	\$0.00
Box 6 Medicare Tax	\$0.00	\$0.00	\$0.00
Box 7 Social Security Tips	\$0.00	\$0.00	\$0.00
Box 8 Allocated Tips	\$0.00	\$0.00	\$0.00
Box 9 Advance EIC Payments	\$0.00	\$0.00	\$0.00
Box 10 Dependent Care Benefits	\$0.00	\$0.00	\$0.00
Box 11 Nonqualified Plans	\$0.00	\$0.00	\$0.00
Box 12 Amt	\$0.00	\$228.15	\$228.15
Box 14 Amt	\$0.00	\$0.00	\$0.00
Box 16 State Wages	\$0.00	\$0.00	\$0.00
Box 17 State Income Tax	\$0.00	\$0.00	\$0.00
Box 18 Local Wages	\$0.00	\$0.00	\$0.00
Box 19 Local Income Tax	\$0.00	\$0.00	\$0.00
User: NWS Pages: 1 of 2 11/7/2017 3:40:35 PM			

Utility Management

Customer Service

Correcting Bad Transaction Data

Maintenance > Utility Management > Miscellaneous Definitions > Fix Detail Balance Issue

Some utilities may have a small number of accounts for which the overall balance is known and correctly displayed on most screens, while in other specific screens, such as the Aging Balance screen, for example, there exists a small discrepancy between the total balance and the balance displayed at the charge category/line-item detail level. This will sometimes occur due to software defects that have since been resolved.

Important: This issue does not affect the overall account balance, which the system knows and accurately displays in most screens and processes. The discrepancies exist only at the detailed line-item level. Likewise, the process of correcting bad data as described below, also does not affect the overall balance, just the data at the charge category/line-item level.

The following enhancements have been made to correct this issue:

- » A new security component: **UM - Account Balance Fix**. See [Setup](#) below.
- » A new menu item has been added, **Fix Detail Balance Issue**, which opens the new **Fix Detail Balance Issue** page. See [Step-by-Step: Fixing an Account's Detail Balance](#).

Setup

Security

Maintenance > new world ERP Suite > Security > Users > Select a user > Click Permissions

Correcting bad transaction data is done via the new Fix Detail Balance Issue page described in the section below. The appropriate users must be authorized to the following security component in order to access and use the Fix Detail Balance Issue page:

Security component: **UM - Account Balance Fix**.

Application: **Utility Management**

Feature Group: **UM - Maintenance**

Identifying Accounts with Bad Transaction Data

If you find discrepancies in the amounts displayed in any of the following areas, then you may have bad transaction data that can be fixed via the [correction process](#) described below.

- » **Trial Balance Report**. For affected accounts, the details and the summary line of the trial balance are off by some amount.
- » **Aging Balances** (Customer Service > Select an account > Click on the Balances section to display the aging balances). For affected accounts, the details and the summary line of the trial balance are off by some amount. The following screen shot illustrates this type of discrepancy.

 **new world**
myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

City of NWS

Customer Service

Account: 0225100-001
Address: [Dropdown]
Name: [Dropdown]
Go Recent Accounts Reset

Customer Service
0225100-001 - Active
SANDIDGE, DIONNE CARLA
1519 17TH ST

Transactions
Services
MC X
SW X
WS X
Associated Customers (0)
WS X
Associated Customers (0)
Deposits (1)
Bank Drafting
Documents (1)
User Defined

Account Information

Location
Account Number 0225100-001
Service Address 1519 17TH ST
Troy MI 48064-3668
Carrier Route
Delivery Point 0
Billing Profile Cycle A (15th to 14th)

Customer
37147
Name DIONNE CARLA SANDIDGE
Phone (100) 083-3616

Balance \$125.19 as of 10/02/2017

	Overall	0-30 Days
WATER	0.00	0.00
Water	49.82	0.00
Water Bedford	0.00	0.00
Water Amherst	0.00	0.00
Water Campbell	0.00	0.00
Removal	0.00	0.00
BOD / SS CHARGE	0.00	0.00
BOD / SS charges	0.00	0.00
HYDRANT	0.00	0.00
Hydrant Rental	0.00	0.00
Total	175.19	0.00

» Often credits will appear in charge categories or charges in credit charge categories.

	Overall	0-30 Days
WATER SUMMARY	0.00	0.00
Water Base Fee	0.00	0.00
Water Volume	0.00	0.00
Water Sales Tax	0.00	0.00
Water Penalty	0.00	0.00
Change Over Fee	0.00	0.00
Water NSF Fee	0.00	0.00
Disconnect Fee	0.00	0.00
Backflow Test	0.00	0.00
Meter Tampering	0.00	0.00
Damaged Meter	0.00	0.00
Late Reporting	0.00	0.00
Overtime Service	0.00	0.00
Fireline	0.00	0.00
Private Hydrant	0.00	0.00
Water Overpay	0.00	0.00
SEWER SUMMARY	0.00	0.00
Sewer Base Fee	26.60	0.00
Sewer Volume	0.00	0.00
Sewer Tracking	0.14	0.00
Sewer NSF Fee	0.00	0.00
Sewer Penalty	(35.85)	0.00
Sewer Overpay	0.00	0.00
TRASH SUMMARY	0.00	0.00
Trash Fees	9.11	0.00
Trash Penalty	0.00	0.00
Trash Overpay	0.00	0.00
Total	0.00	0.00

- » The aging may include very old balances, older than payment transaction dates would suggest.
- » **Customer Service.** For those with credit balances, the refund button will typically not allow the user to refund the full amount.
- » **Adjustments.** The balance in Adjustments does not equal the balance in Customer Service.

Adjustment screen:

Customer Service

Adjustment

General

Approvals

Transaction Details

Account

090009102-001

Transaction Date

10/18/2017

G/L Date

10/18/2017

Adjustment Type

Reason

Reference Transaction

No reference transaction

Activity Date

Reason

Description

Charge Category	Current	Adjustment	Results
WATER SUMMARY			
Water Base Charges	\$36.40	\$0.00	\$36.40
Water Volume Charge	\$17.76	\$0.00	\$17.76
Water Sales Tax	\$4.41	\$0.00	\$4.41
Water Penalty Charges	\$2.12	\$0.00	\$2.12
Change Over Fee	\$0.00	\$0.00	\$0.00
Water NSF Fee	\$0.00	\$0.00	\$0.00
Disconnect Fee	\$35.00	\$0.00	\$35.00
Backflow Testing Fee	\$0.00	\$0.00	\$0.00
Meter Tampering Fee	\$0.00	\$0.00	\$0.00
Damaged Meter Fee	\$0.00	\$0.00	\$0.00
Totals:	\$286.70	\$0.00	\$286.70

Save

Save/New

Delete

Reset

Customer Service:

Account Information	
Location 	
Account Number	090009102-001
Service Address	4835 BARLOW DR Troy MI 48085-192
Carrier Route	
Delivery Point	
Billing Profile	Cycle 1 Billed 10th of month
Customer 	
Name	LUTZ PASASHA
Phone	(152) 585-7811
Balance \$260.81 as of 10/18/2017 	
Events	

Step-by-Step: Fixing an Account's Detail Balance

The process for correcting bad transaction data is simple: Once you have identified an account as having the bad transaction data issue, you can open the **Fix Detail Balance Issue** page, enter the account number you would like fixed in the **Account Number** field, and then click the **Fix** button.

Following is a detailed step-by-step description of the process to correct an account's bad transaction data.

1. Make sure the Utility Management and General Ledger systems are in balance.

The general ledger is NOT affected by this process. However, you must make sure that the Utility Management and General Ledger systems are in balance before and after you run the fix. If they are not in balance after the fix is run, you must manually make whatever minor adjustments are necessary to achieve balance. Any necessary adjustments should be very small.

2. Open the Fix Detail Balance Issue page: **Maintenance > Utility Management > Miscellaneous Definitions > Fix Detail Balance Issue.**

Fix Detail Balance Issue

**In some instances, you may need to make minor GL adjustments after this process.
Make sure the Utility system and General Ledger system balance before this process.
After executing the process, make any necessary adjustments to put them back in balance**

Account Number

Fix **Reset**

3. In the *Account Number* field, enter the number of the account you would like to fix.
4. Click **Fix**.

If the account is **invalid**, a message will display to inform the user. Likewise, if the account is **valid** but has pending transactions, a message will display to inform the user that all associated transactions must be posted before the fix can be executed for the account.

If the account is valid and has no associated pending transactions, one of the following will occur:

- a. **The fix will succeed** – The issues with the account will be fixed and a message will appear to inform the user that the fix was successful.

At this point, you need only check to make sure that Utility Management and the general ledger are in balance, and, if there's an imbalance, make the necessary minor adjustments to achieve balance. Beyond that, nothing more need be done.

- b. **The fix will fail** – The system will be unable to fix the discrepancy and a message will display to inform the user that the fix was unsuccessful and that the user should try the fix again after the next New World ERP patch or software release is applied.

In this situation, the system, for whatever reason, was unable to make the changes necessary to correct the bad data. Enhancements will be added to the next software release to fix this situation.



Note: Failure is highly unlikely. Should it occur, you should contact your Tyler representative.

- c. **The fix will neither succeed nor fail** – The system may determine that there is nothing wrong with the account, that there is no problem with bad data. If this is the case, the issue must be resolved via manual adjustments.



Example: One example of this scenario is when a charge has been offset by an overpayment. When this happens, you will likely have to make a pair of adjustments to correct the discrepancy, an overpayment adjustment followed by a payment adjustment to lower the balance, and apply that money to the actual charges.

Payment Plan Enhancements in 2018.1

Utility Management > Customer Service > Select an account > Payment Plan

Overview

In New World ERP 2018.1, a number of changes have been made to improve payment plans in Utility Management. When consumers are put on a payment plan, they are expected to catch up on their past due amount through plan installments, while also keeping up with their ongoing charges, some of which will likely come due within the time-frame of the payment plan. In earlier releases of New World ERP, when a payment plan is created and a payment is made, the results are sometimes unexpected in regard to how the payment will be applied.

Enhancements have been made to improve the way plans apply payments against ongoing charges and plan installments. These changes make the process much more intuitive for utilities and consumers alike, and create outcomes that better match the likely intent of the consumer. Enhancements were also made to correct flaws in the plan creation process that, in earlier releases of New World ERP, contribute to the faulty application of payments.

What does this mean for New World ERP users?

If you have been using payment plans, the work load required to manage plans and the need to closely monitor them will be greatly reduced. The new enhancements resolve issues related to the incorrect reporting of the plan status, as well as plans closing early or not

closing when expected. The reports and presentations of the plan status in the system will be accurately represented.

If you have NOT been using payment plans because they were not working to your satisfaction, you should consider using them now as the process has been refined and made much more intuitive.



Note: These enhancements should result in the proper functioning of newly created plans. However, they will have little impact on existing plans. Consider closing and re-opening existing plans to receive all the benefits of the new enhancements.

Payment Plan Creation Enhancements

When Payment Plans Are Created for Less Than the Entire Account Balance

In earlier releases of New World ERP, if a payment plan is created for less than the entire balance of the associated account, the payments may not track accurately against the installments.

For example, when setting up a payment plan, billing managers and customer service representatives often prefer to have the customer pay part of the balance up front as a good faith effort on the part of the customer. Such good faith payments are typically due either immediately or shortly after a payment plan is defined, before the first installment is due. In earlier releases of New World ERP, the most recent regular bill or good faith due date doesn't always appear on the payment plan, and a payment made toward that bill might actually be applied to a payment installment.

This issue has been corrected. Now, payment plans can be created for any portion of the account balance and the plan will execute correctly. Also, payments made toward bills that are due will no longer affect the installments.

When Payment Plans Are Created for Accounts with Pending Transactions

In earlier releases of New World ERP, if an account has pending transactions when a payment plan is created, the plan may not function correctly when payments are made. The payments are effectively counted twice, once in the plan installments and also as ongoing charges incur while the plan is active. This behavior contributes to the core issues described above, i.e., plans not closing correctly or reporting status correctly.

Now, when a plan is created for an account with pending transactions, all transactions are recognized within the plan and payments are processed as they should be, as one would expect them to be, correctly and in order of due date.

When Payment Plans Are Set to Follow the Frequency of the Bill

Previously, when the plan was set to follow the frequency of the bill (i.e., when the *Frequency* field on the Payment Plan page was set to Billing Cycle), the system would set the installment dates to match the billing dates of the bills they followed instead of the due dates of the bills they followed. This is not the intention of the Billing Cycle setting, which is to make installments and their corresponding bills due on the same date.

This has been corrected. The installment dates are now set to the due dates of the bills they follow, so, when the plan is set to follow the frequency of the billing cycle, installments and their corresponding bills are now truly due on the same date.

Payment Plan Payoff Enhancements

Paying Ongoing Bills Based on Billing Date vs. Due Date

As stated above, consumers on payment plans are expected to catch up on their past due through payment plan installments while also keeping up with their ongoing charges. In earlier releases of New World ERP, the system pays ongoing bills based on their billing dates instead of their due dates. When a user makes a payment that is intended to pay off an installment, the payment may instead be applied toward a bill whose associated billing date falls before the installment date. Since paying an ongoing bill at the earliest possible moment is rarely the consumer's intention, this usually results in significant confusion for the consumer and the utility staff as to how payments are applied against the plan.

Now, bill charges and miscellaneous charges appear in the payment plan schedule based on their calendar due dates instead of their billing dates, thus eliminating the confusion described above. As money comes in, bills, other charges, and installments are paid off in the correct order, based on their due dates, not their billing dates.

"Paying Ahead" on Installments

In earlier releases of New World ERP, plans do not allow consumers to "pay ahead" on their installments. The system imposes a confusing set of rules to apply extra payments to shorten the plan rather than allow consumers to pay ahead on their installments.

This has been corrected. Payments are now applied to the next item in the time line (i.e., ongoing charge or a plan installment) whether or not the due date is in the future. This should result in a significantly more intuitive plan status.

Consumption Reporting & Billing Adjustments

Maintenance > Utility Management > UM Settings > Consumption tab

The **Consumption Trend Report** in Utility Management and the **Consumption Analysis** page in eUtilities both report on consumption and the charges that result from the consumption by bill cycle. In earlier releases of the software, billing adjustments are automatically factored into this consumption information.

In New World ERP release 2018.1, enhancements have been made to give administrators the option of including or excluding billing adjustment information from the Consumption Trend Report and Consumption Analysis page.

This option is provided by way of the **Include Billing Adjustments** check box, which has been added to the **Consumption** tab of the UM Settings page.

UM Settings																							
General	Work Flow	Accounts	Consumption	Bills	Receipts	Delinquencies	Adjustments	Work Orders	Deposits	Counters													
Read Types Initialize: Initial Failure: Rejected Estimate Estimate: User-Defined 1: Manual ☒ Default for Manual Entry ☐ Default for AMR Created ☒ Considered Actual Reads by Audit User-Defined 2: Final ☐ ☐ ☒ User-Defined 3: Change-Out ☐ ☐ ☒ User-Defined 4: Actual ☐ ☒ ☒ User-Defined 5: ☐ ☐ ☐ User-Defined 6: ☐ ☐ ☐						Consumption Audits Consumption Comparison ☒ Too Many Consecutive Estimates ☒ Zero Consumption ☒ Rollover/Negative ☒ Consumption on Inactive ☒ Meter Exchange ☒ Multiplier Modified ☒ New and Move in ☐ Insufficient History ☐						Meters ☒ ☒ ☒ ☒ ☒ ☒ ☐ ☐						Non-Metered Units ☒ ☒ ☒ ☒					
Time of Use Titles Period 1: On-Peak Period 2: Off-Peak Period 3: Afternoon Peak						Billing Audits Bill Audit ☒																	
Seasonal Averaging						Negative Consumption Calculation Action: Negative Consumption																	
						Consumption Trend and eSuite Consumption Include Billing Adjustments ☒																	
						Billing - Consumption Entry																	

If the **Include Billing Adjustments** check box is **selected** and saved, then billing adjustments will henceforth be factored into the Consumption Trend Report and Consumption Analysis page. In other words, for a given bill cycle, the charges from the bill and any billing adjustments that occurred to correct billed amounts will all be combined.



Note: The check box is selected by default, so after the 2018.1 update the report and eUtilities page will work exactly as they always have, i.e., they will both continue to include billing adjustments in their numbers.



Note: If the **Include Billing Adjustments** check box is selected, the report and Consumption Analysis page will include billing adjustments but never payment or bad debt adjustments.

If the **Include Billing Adjustments** check box is **cleared**, then billing adjustments will NOT be included in the report or Consumption Analysis page; these features will report only on the actual charges from the bill.

The check box only effects the Consumption Trend Report in Utility Management and the Consumption Analysis page in eUtilities. No other areas of Utility Management or eSuite are effected.

How to Access the Consumption Trend Report

1. In Utility Management, open Customer Service.
2. Open an account.
3. Click the printer  icon in the upper right-hand corner of most Customer Service screens. The Activity Statement pop-up window will open.
4. From the **Statement Type** drop-down list, select Consumption Trend Report.
5. Define a date range.
6. Click **OK**.

How to Access the Consumption Analysis Page

1. Open and sign into eSuite eUtilities.
2. Click the **Account Details** drop-down control and select **Consumption Analysis** from the drop-down list.

The Consumption Analysis page will open.

SECURITY COMPONENT CHANGES 2018.1

This table contains the security component changes in the 2018.1 release:

Module	Security Component Name	Where Used?	License Key Item
Community Development	Permit Issuance Before Payment	Process Permit to Issued Status	Construction Permits
Human Resources	Change Request Direct Deposit Documents	Employee Change Request	User Count
	Change Request Employee Documents	Employee Change Request	User Count
	Employee Change Request Print W-4	Employee Change Request	eSuite: eHR
	Employee Direct Deposit Documents	Workforce Administration	User Count
	Employee Setup Error Report	Employee Information Reports	User Count
	Employee Tax Documents	Workforce Administration	User Count
Suite	About Page	Allows users to see the About New World ERP page	User Count
System-Wide	Global Search - AP Invoices	Global Search	User Count
	Global Search - Employees	Global Search	User Count
	Global Search - Journals	Global Search	User Count
	Global Search - MB Customers	Global Search	User Count
	Global Search - MB Invoices	Global Search	User Count
	Global Search -	Global Search	User Count

Module	Security Component Name	Where Used?	License Key Item
	Notes		
	Global Search - Payments	Global Search	User Count
	Global Search - Purchase Orders	Global Search	User Count
	Global Search - Revenue Collection Receipts	Global Search	User Count
	Global Search - UM Accounts	Global Search	User Count
Utility Management	eSuite User Profiles	Customer Service	User Count

[Security Component Changes 2017.1 MIU](#)

[Security Component Changes Archive](#)

SECURITY COMPONENT CHANGES 2017.1 MIU

This table contains the security component changes delivered via 2017.1 MIU patches:

Module	Security Component Name	Where Used?	License Key Item
Community Development	Inspection Business Results Report	Business Inspection Report	User Count
	Inspection Case Results Report	Case Inspection Report	User Count
	Inspection License Results Report	License Inspection Report	User Count
	Inspection Location Results Report	Location Inspection Report	User Count
	Inspection Permit Results Report	Permit Inspection Report	User Count
Human Resources	Alabama RSA Report	AL State Requirements	User Count
	Alabama System Settings Maintenance	AL State Requirements	User Count
	Alaska Retirement List	AK State Requirements	User Count
	Arizona System Settings Maintenance	AZ State Requirements	User Count
	Indiana New Hire Report	IN State Requirements	User Count
	Iowa System Settings Maintenance	IA State Requirements	User Count
	Mississippi Quarterly Wage Report	MS State Requirements	User Count
	Mississippi Retirement List	MS State Requirements	User Count
	Mississippi System Settings Maintenance	MS State Requirements	User Count

Module	Security Component Name	Where Used?	License Key Item
	North Carolina Annual Withholding Reconciliation	NC State Requirements	User Count
	Wisconsin Retirement List	WI State Requirements	User Count
	Wisconsin System Settings Maintenance	WI State Requirements	User Count
<i>Utility Management</i>	UM-Account Balance Fix	Utility Maintenance	User Count

[Security Component Changes 2018.1](#)

[Security Component Changes Archive](#)

RELEASE NOTES

Community Development

The tables below contain descriptions of the Community Development items that are part of the 2018.1 release of new world ERP.

To get software enhancements to our customers at the earliest possible availability, we provide new enhancements via MIU patches that can be downloaded and installed between releases. These enhancements are essentially "next release" enhancements delivered early. They are identified in the release notes with the previous release number and the "MIU" identifier.

For details on new features and enhancements to existing features, see "[What's New in Community Development](#)."

eLicensing

eLicensing			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	Licensing functionality has been cleaned up.	5809305	2017.1 MIU
<i>Product Improvement</i>	A SHOW LICENSE HISTORY button has been added to the Select licenses for payment grid to show expired, paid renewals. More .	5866302	2017.1 MIU
<i>Product Improvement</i>	Users are now able to disable the ability of eSuite licensees to change their names in eSuite. They also can disable the ability to disable changing the address.	NA	2017.1 MIU
<i>Product Improvement</i>	An unused content configuration has been removed from eSuite Administration.	NA	2017.1 MIU
<i>Product Improvement</i>	The Licensee Information section has been removed from the License Renewal page in eSuite. Any information a customer wants visible may be entered as Renewal Default Form content configuration.	NA	2017.1 MIU
<i>Product Improvement</i>	An apostrophe in the licensee name was adding characters.	NA	2017.1 MIU

eLicensing			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	Items to pay and Payment Amount sections have been moved below the Select licenses for payment section.	NA	2017.1 MIU
<i>Product Improvement</i>	A <i>Print</i> column and a <i>Renewal Status</i> column have been added to the grid in the Select licenses for payment section.	NA	2017.1 MIU
<i>Product Improvement</i>	The user is able to view a print preview before selecting the <i>print this receipt</i> option.	NA	2017.1 MIU
<i>Product Improvement</i>	The user is not able to see the Items to Pay and Payment Amount sections when there is nothing to pay.	NA	2017.1 MIU
<i>Product Improvement</i>	<i>Payment Amount</i> , <i>License Number</i> and <i>License Type</i> have been added to the license payment confirmation email.	NA	2017.1 MIU
<i>Warranty</i>	Unposted undesignated balances applied to a renewal line item were appearing as available when the renewal was viewed in licensing.	2228988	2017.1 MIU
<i>Warranty</i>	The Charge Detail pop-up was displaying an error.	5920776	2017.1 MIU
<i>Warranty</i>	Paying for two license renewals doubled the credit card charge; for example, if one renewal was \$50 and the other was \$25, instead of being charged \$75, the card was charged \$150.	5931672	2017.1 MIU
<i>Warranty</i>	An unposted delinquent fee was applied to the license payment amount and displayed as -1 in the back office.	6181834	2017.1 MIU
<i>Warranty</i>	License Expiration time was preventing contractors from logging into eSuite.	NA	2017.1 MIU

ePermits

ePermits			
Type	Description	Case Number	Fix Version
<i>Product</i>	A Request button was added to the inspections	NA	2018.1

ePermits			
Type	Description	Case Number	Fix Version
<i>Improvement</i>	grid to allow users to request several inspections at one time. More .		
<i>Warranty</i>	Permit inspections in eSuite could be canceled using only an address as authentication.	5540117	2017.1 MIU
<i>Warranty</i>	The phone number on the Request Permit page was not reflecting the same phone number in the back office.	5549002	2017.1 MIU
<i>Warranty</i>	Addresses with one number were not populating in the eSuite drop-down.	5682716	2017.1 MIU
<i>Warranty</i>	Compliance item comments were not saved if copy and pasted.	5743091	2017.1 MIU
<i>Warranty</i>	Scheduled inspections were displaying as failed in eSuite.	5796475	2017.1 MIU
<i>Warranty</i>	License expiration times were preventing contractors from logging into eSuite.	NA	2017.1 MIU
<i>Defect</i>	The MIU server ePermits page displayed an error on logging in as Contractor.	NA	2017.1 MIU
<i>Defect</i>	Permits could not be opened in eSuite Permits. An exception occurred.	NA	2017.1 MIU

Inspections

Inspections			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The parent item ID on the Inspection Details page has been linked to the details page of the parent item. More .	NA	2018.1
<i>Product Improvement</i>	The following enhancements have been made to the Inspection List/Search page: » <i>Inspection Template</i> has been added as a search filter. » Internal comments are displayed on an expansion	NA	2018.1

Inspections			
Type	Description	Case Number	Fix Version
	ded inspection card on the History tab of the parent details pop-up. » The width of the quick pass Confirmation dialog has been reduced to better fit the contents of the dialog. More.		
Product Improvement	An <i>Internal Comments</i> field has been added to the Create Inspection dialog (More) and the Inspection Details page (More). On the Inspection Details page, hovering over a comment that extends beyond the visible area of the field displays the complete comment in a tool tip.	5526761	2017.1 MIU
Product Improvement	The AM/PM inspection labels have been updated so they appear independently only if the inspector has an AM or PM inspection. The AM/PM information also appears on one line. More.	5971321	2017.1 MIU
Product Improvement	A <i>Parent Contact</i> column has been added to the Inspection Schedule. More.	NA	2017.1 MIU
Product Improvement	The Inspection Details page has been enhanced as follows: » An <i>Internal Comments</i> field has been added. » A failed compliance item expands automatically to display the Codes in Violation grid and the Add Row button. » A <i>Print Citation</i> column with buttons to print citations has been added to the Citations grid on the case Inspection Details page. » A user who tries to complete an inspection that is associated with an open reinspection receives a warning that saving the inspection result will remove the reinspection from the	NA	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
	system. More .		
<i>Product Improvement</i>	The Create Inspection dialog has been enhanced as follows: » Comment fields have been added. » <i>Schedule Inspection</i> check box has been added as a header for the inspection scheduling fields. » Selecting an <i>Inspector</i> displays the inspector's calendar at the bottom of the dialog. More.	NA	2017.1 MIU
<i>Product Improvement</i>	The parcel owner name and address have been added to the Contacts tab of the Case Details pop-up. More .	NA	2017.1 MIU
<i>Product Improvement</i>	Selecting a customer from the Customer to be Billed drop-down on the Add Citation page displays the customer's address in read-only format below the field. More .	NA	2017.1 MIU
<i>Product Improvement</i>	The display of an inspector's work schedule and the AM and PM notations have been enhanced on the Inspection Scheduler page. More .	NA	2017.1 MIU
<i>Product Improvement</i>	The SSRS Inspection Worksheet and the mail merge worksheet template have been updated to include internal comments.	NA	2017.1 MIU
<i>Product Improvement</i>	The layout of the scheduling notification stop work block was modified to improve clarity.	NA	2017.1 MIU
<i>Product Improvement</i>	The standard print button label in inspection details is Print Worksheet or Print Results Report .	NA	2017.1 MIU
<i>Product Improvement</i>	Inspections that are not scheduled will be removed upon permit completion.	NA	2017.1 MIU
<i>Product Improvement</i>	Case inspections have access to custom reports in the back office.	NA	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
Product Improvement	The mass print Inspection Worksheet and Inspection Results buttons on the Inspector Planner page have been upgraded to have the same functionality as the buttons on the Inspection List page. More .	NA	2017.1 MIU
Product Improvement	Stop work comments are now audited in the <i>Comment</i> field. The user may add comments using the + button. More .	NA	2017.1 MIU
Product Improvement	A mailing address will appear under the Miscellaneous Billing Customer field after a selection has been made. More .	NA	2017.1 MIU
Product Improvement	Inspection citation processing has been enhanced. More .	NA	2017.1 MIU
Product Improvement	An audit trail has been applied to inspection comments. More .	NA	2017.1 MIU
Product Improvement	A tool tip has been added to the <i>Inspection Comments</i> and <i>Internal Comments</i> fields on the Inspection Details page.	NA	2017.1 MIU
Product Improvement	Inspections were removed from the Notification Manager; they now are handled within Inspection Maintenance. More .	NA	2017.1 MIU
Product Improvement	The Search Index Status "Purge Index" warning display has been changed to a more accurate and informative message.	NA	2017.1 MIU
Warranty	Other was not appearing on the Delinquent Notice Listing.	5526394	2017.1 MIU
Warranty	Parent contact phone and email information are now available on the Inspection Scheduler page.	5527498	2017.1 MIU
Warranty	Hovering over an inspection in the Inspection Planner displayed the parcel owner <i>Address Line 2</i> field.	5528460	2017.1 MIU
Warranty	Simultaneously scheduling multiple inspections for different days on the Inspection Scheduler page resulted in inspections being scheduled on the wrong day.	5528481, 5544948	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
Warranty	License delinquent notices were not printing for Other and Animal Licenses.	5528893, 5574913, 5526424	2017.1 MIU
Warranty	The <i>Comment</i> field was missing from inspection add page.	5530785	2017.1 MIU
Warranty	A user now has the ability to remove a non-resulted re-inspection in the process of re-resulting an original inspection. If the re-inspection has been resulted, re-resulting the original inspection is disabled.	5535677	2017.1 MIU
Warranty	When a permit type was created, inactive inspection templates were available as selections.	5544903	2017.1 MIU
Warranty	Unposted inspection billing batches could not be edited.	5546648	2017.1 MIU
Warranty	All compliance code comments now appear on the SSRS standard report.	5546779, 5527529	2017.1 MIU
Warranty	Scheduling, creating and resulting inspections on permits should extend the expiration date according to what is set up in permit type.	5548880, 6000194	2017.1 MIU
Warranty	Adding business inspections with long inspection template names caused existing business inspections to disappear.	5565118 , 5529174, 5529178, 5527488	2017.1 MIU
Warranty	An insert foreign key error add on occurred.	5633227, 5678109, 5656774	2017.1 MIU
Warranty	Inspection UDFs with a validation set were not being visibly saved to the inspection.	5661805	2017.1 MIU
Warranty	Duplicate comments caused an error during the attempt to schedule a re-inspection.	5685372, 6074976	2017.1 MIU
Warranty	The Send to myReports option has been removed from SSRS reports.	5689405	2017.1 MIU
Warranty	Pass was displayed in the inspection detail in eSuite, even though the inspection was Condi-	5710770	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
	tionally Passed.		
Warranty	Canceling inspections from the iPad was not triggering cancel inspection notifications.	5719542	2017.1 MIU
Warranty	Compliance item codes are no longer automatically added when a compliance item is failed unless there is only one associated code.	5739941	2017.1 MIU
Warranty	Inspection mail merge worksheets and results were displaying, regardless of whether a user had been assigned permission.	5743002	2017.1 MIU
Warranty	The Create Notification feature has been re-added to the new Inspections module.	5745415	2017.1 MIU
Warranty	Inspection Create Notifications can be triggered from the Community Development service pages.	5745415	2017.1 MIU
Warranty	Memory was spiking in IE.	5752796	2017.1 MIU
Warranty	During the inspection create process, the <Tab> key needed to be pressed multiple times before the cursor advanced to the next field.	5752881	2017.1 MIU
Warranty	AM and PM inspections were stacking vertically, making it difficult to view the number of inspections scheduled for the day without scrolling. AM and PM inspections now wrap after the new Refresh Calendar button is selected.	5768512	2017.1 MIU
Warranty	Creating mail merge Inspection Worksheet documents resulted in time outs.	5771885	2017.1 MIU
Warranty	Citations created before the multi-citation enhancement prevented inspection billing batches from being created correctly.	5787742	2017.1 MIU
Warranty	Inspection worksheets were not printing in sequential order. This issue has been resolved so the worksheets print in the same order they are scheduled for the day.	5820744	2017.1 MIU
Warranty	An eek comment was appearing on the Inspec-	5843362	2017.1

Inspections			
Type	Description	Case Number	Fix Version
	tion Worksheet mail merge.		MIU
Warranty	Citations could not be printed from the Inspection Details page.	5853693	2017.1 MIU
Warranty	The Case Form Letter mail merge was missing compliance item information.	5868841	2017.1 MIU
Warranty	If inspection numbers were assigned using a masking that was different from the 2017.1 format, new inspections could not be created.	5889929	2017.1 MIU
Warranty	An error occurred when the rtf mail merge Inspection Report was printed.	5915179	2017.1 MIU
Warranty	An Inspection Worksheet mail merge error occurred.	5919306	2017.1 MIU
Warranty	Single quotes entered in UDF fields were being encoded and preventing the Request inspection button from working.	5931284	2017.1 MIU
Warranty	The card height on the Inspection Scheduler calendar was decreased to allow for more inspectors to be visible without scrolling.	5971321	2017.1 MIU
Warranty	AM and PM Inspections appeared as Anytime on the Inspection Worksheet mail merge document.	6014725	2017.1 MIU
Warranty	When there was more than one inspection citation and the user attempted to print one, the following print error occurred: "Expects parameter @CitationNumber."	6033353	2017.1 MIU
Warranty	While multiple inspections are scheduled for Any Time, the inspections are scheduled vertically at the same time instead of being horizontally stacked.	6122357	2017.1 MIU
Warranty	If a re-inspection was removed, a link to it was still seen in the original inspection's history.	NA	2017.1 MIU
Warranty	Deleted re-inspection references were still visible on the result report for the original inspection.	NA	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
Warranty	An inspection template that had been set up to require a pass to issue a final certificate of completion was not working in some cases. If this template was assigned to a permit and failed, even passing a re-inspection would not allow a final certificate of completion to be issued.	NA	2017.1 MIU
Warranty	Citations and compliance items were not appearing on the Case Service inquiry page.	NA	2017.1 MIU
Warranty	User-defined fields in inspections did not adjust based on the size specified in maintenance.	NA	2017.1 MIU
Warranty	Inspection names on permits were duplicated in some cases.	NA	2017.1 MIU
Warranty	If a re-inspection was removed, a link to it remained visible in the original inspection history.	NA	2017.1 MIU
Warranty	Deleted re-inspection references remained visible in the original Inspection Result Report.	NA	2017.1 MIU
Defect	On the Inspection Scheduler page, PM inspections initially displayed at the wrong location.	NA	2017.1 MIU
Defect	The lowercase letter <i>g</i> was cut off in Inspection Maintenance.	NA	2017.1 MIU
Defect	A Final Certificate of Completion could be issued despite having a failed inspection that had the <i>Issue Final Certificate of Completion</i> marked as required.	NA	2017.1 MIU
Defect	A stop work warn vs. warning discrepancy was identified.	NA	2017.1 MIU
Defect	The stop work history icon did not display on the Inspection List/Search page.	NA	2017.1 MIU
Defect	Inspection comments added during a re-inspection were not saved when a quick pass was used.	NA	2017.1 MIU
Defect	The <i>Created by</i> and <i>Comments Added by</i> user were incorrect for case inspections created	NA	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
	based on case type.		
<i>Defect</i>	Inspection comments did not carry over from the original inspection to a re-inspection.	NA	2017.1 MIU
<i>Defect</i>	Comments and codes were dumped into one cell after being entered separately.	NA	2017.1 MIU
<i>Defect</i>	After inspection comments were added during a create inspection, all inspection template options were not always visible.	NA	2017.1 MIU
<i>Defect</i>	The global search tool tip scroll bar disappeared when clicked.	NA	2017.1 MIU
<i>Defect</i>	The Inspection Schedule Report (XML) sample mail merge template has been removed.	NA	2017.1 MIU
<i>Defect</i>	The Inspection Scheduler time fields were not working correctly.	NA	2017.1 MIU
<i>Defect</i>	Inspection internal comments did not display on the Inspection Worksheet SSRS or mail merge reports unless there also was an inspection comment.	NA	2017.1 MIU
<i>Defect</i>	The <i>Customer</i> drop-down on the Add Citation drop-down was not working correctly.	NA	2017.1 MIU
<i>Defect</i>	Inactive inspectors caused the inspector filter control to function improperly when they were applied through trade selection.	NA	2017.1 MIU
<i>Defect</i>	Miscellaneous Billing customers were not displaying in the drop-down when a citation was added in case inspection details. Searching by customer and sorting also were not working correctly.	NA	2017.1 MIU
<i>Defect</i>	An error was encountered in the generating of inspection result reports.	NA	2017.1 MIU
<i>Defect</i>	An error was encountered in the generating of inspection worksheet reports.	NA	2017.1 MIU
<i>Defect</i>	Miscellaneous Billing customers were not displaying in the drop-down when a citation was	NA	2017.1 MIU

Inspections			
Type	Description	Case Number	Fix Version
	added.		
<i>Defect</i>	Two stored procedures referred to the deprecated InspectionCrossReference table.	NA	2017.1 MIU
<i>Defect</i>	Entering a comment and deleting it while creating an inspection caused an error.	NA	2017.1 MIU
<i>Defect</i>	A javascript error occurred when an inspection link was clicked in Inspection Billing Invoice Entry.	NA	2017.1 MIU
<i>Defect</i>	Inspections have been removed from the Notification Manager.	NA	2017.1 MIU
<i>Defect</i>	On service page inspection nodes, a stored procedure error occurred in laserfiche paperclip environments.	NA	2017.1 MIU
<i>Defect</i>	The Inspections process has been removed from the Notification Manager.	NA	2017.1 MIU
<i>Defect</i>	The Inspection Scheduler was not using the default settings or the inspector overrides to determine when AM/PM inspections were added.	NA	2017.1 MIU
<i>Defect</i>	In the Inspection Scheduler, inspections were not removed from the left pane results section after they were moved onto the calendar.	NA	2017.1 MIU

Licensing

Licensing			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	A range of address numbers may be searched on the Search Licensees dialog. More .	NA	2018.1
<i>Product Improvement</i>	A duplicate license with the same license effective date range may be canceled.	NA	2018.1
<i>Warranty</i>	Licenses with a category of Other were not pulling into the Delinquent Notice Listing.	5526394	2017.1 MIU

Licensing			
Type	Description	Case Number	Fix Version
Warranty	An inconsistent balance existed between the Licensee Listing and the license in the software.	5526460	2017.1 MIU
Warranty	All columns now fit on one page of the Business Listing Report, including the PDF version of the report.	5526694, 5529421	2017.1 MIU
Warranty	Undesignated balances were automatically applied within a renewal batch when the user applied it manually from within a license.	5546458	2017.1 MIU
Warranty	Unposted undesignated balances applied to a renewal line item were appearing as available when the renewal was viewed in licensing.	5546458	2017.1 MIU
Warranty	Unposted payments were appearing incorrectly on licenses.	5546657	2017.1 MIU
Warranty	Duplicate business licenses appeared on the Business License Report when there were UDFs for animal licenses and an animal license was not associated with the business.	5547074	2017.1 MIU
Warranty	Print Renewals were not printing in address order.	5549272	2017.1 MIU
Warranty	Comments attached to one renewal were showing up on another renewal for a different license.	5549284	2017.1 MIU
Warranty	Index was added to a stored procedure to prevent a time-out error.	5743369	2017.1 MIU
Warranty	Duplicate renewals were created during the batch process if the <i>Open Renewal</i> check box was enabled and an open renewal had the same effective dates.	5987258	2017.1 MIU
Warranty	The auto-complete feature prevented step charges from updating correctly after the quantity was edited on the license charges grid.	6027125	2017.1 MIU
Warranty	An error occurred in the attempt to print all license delinquent notices.	6132737	2017.1 MIU
Warranty	An animal license vaccination record tied to a non-local veterinarian could not be edited	6180574	2017.1 MIU

Licensing			
Type	Description	Case Number	Fix Version
	without an error.		
Defect	A \$0.00 amount is allowed within a range in licensing step charges.	NA	2018.1
Defect	The Form Letters icon has been removed from the license pages.	NA	2018.1
Defect	A stop work warn vs. warning discrepancy was identified.	NA	2017.1 MIU
Defect	Changing the license number in the receipt did not update the <i>Received From</i> field.	NA	2017.1 MIU

Maintenance

Maintenance			
Type	Description	Case Number	Fix Version
Warranty	New World ERP now supports ESRI GIS servers that are locked down to support only the TLS 1.1 and 1.2 protocols.	5526616	2017.1 MIU
Warranty	The timestamp was removed from Date UDF fields in the Case Form Letter mail merge.	5910697	2017.1 MIU
Warranty	AM and PM Inspections were appearing as <i>Anytime</i> on the Inspection Worksheet mail merge document.	6014725	2017.1 MIU
Defect	The <i>Permit Type Cash GL Account</i> drop-down was not working.	NA	2017.1 MIU
Defect	The number of jurisdiction mail codes could not exceed seven.	NA	2017.1 MIU
Defect	The CD Inspection Citation Form was bringing back data only if the inspection was scheduled.	NA	2017.1 MIU

myInspections

myInspections			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The ability to filter and select comments quickly has been added to the Compliance Item Comments display. More.	NA	2017.1 MIU
<i>Product Improvement</i>	The compliance item display has been upgraded to allow all compliance items associated with an inspection to be passed or failed at once. More.	NA	2017.1 MIU
<i>Product Improvement</i>	The Inspection Result dialog has been enhanced to provide the options to create and schedule a follow-up inspection. More.	NA	2017.1 MIU
<i>Product Improvement</i>	A stop work that has been issued to a parcel or permit appears in the Inspection Alerts pop-up, displaying the stop work type and severity. More.	NA	2017.1 MIU
<i>Defect</i>	Saving a scheduled inspection in the back office sends inspection results to myInspections.	NA	2017.1 MIU

Parcel Management

Parcel Management			
Type	Description	Case Number	Fix Version
<i>Defect</i>	The Form Letters icon has been removed from the parcel pages.	NA	2018.1
<i>Product Improvement</i>	Stop work security has been upgraded on the Parcel Search page. More.	NA	2017.1 MIU
<i>Product Improvement</i>	The parcel stop work icon is now visible in Case Service if a stop work has been applied to the case parcel. The stop work icon also is visible when a case is added and a stop work has been applied to the selected parcel.	NA	2017.1 MIU
<i>Product Improvement</i>	Parcel Owner contact information is now visible on case inspections.	NA	2017.1 MIU
<i>Product</i>	Active stop work reports sent to myReports	NA	2017.1

Parcel Management			
Type	Description	Case Number	Fix Version
<i>Improvement</i>	were showing comments on separate pages from other columns.		MIU
<i>Warranty</i>	A permissions error was preventing users from merging parcels, even if they had parcel merge permissions.	5628191, 5525363	2017.1 MIU
<i>Warranty</i>	A stop work could not be edited in Parcel Search.	5854891	2017.1 MIU
<i>Defect</i>	A "not authorized" message displayed when the Parcel Import was run.	NA	2017.1 MIU
<i>Defect</i>	Users received an unauthorized message when using some Parcel Import functionality.	NA	2017.1 MIU

Permits

Permits			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The following enhancements have been made to permits: » A new system setting lets the user enter a threshold for the difference in total fees on a permit from fees collected for the permit. » The permit completion process has been updated to require users to go through Adjustments if the total permit fee collected exceeds the total charge by an amount greater than the threshold amount set. » A Fee Audit Log grid has been added to the Permit Fee History page. » Users are allowed to reduce the permit fees that are already paid.	5525365, 6367347, 6374057	2017.1 MIU
<i>Product Improvement</i>	The Contractor Information section of the Permit-General page allows contacts to be added	NA	2018.1

Permits			
Type	Description	Case Number	Fix Version
	for a selected contractor. More .		
Product Improvement	The Add Fee dialog has been upgraded to allow the selection of multiple fees. More .	NA	2018.1
Product Improvement	The Add Inspection dialog has been replaced with a multi-select list box of the inspection templates available for request. More .	NA	2018.1
Product Improvement	An <i>Inspector</i> column has been added to the grid on the Permit-Inspections page, showing what inspectors have been assigned to scheduled and completed inspections. More .	NA	2018.1
Product Improvement	The <i>Inspection Template</i> link on the Permit-Inspections page has been modified to open a separate tab of the inspection details when clicked. More .	NA	2018.1
Product Improvement	Completing or canceling a permit from the Process Permit dialog removes unscheduled inspections associated with the permit. More .	NA	2018.1
Product Improvement	The Permit Search has been updated with new stop work tables, and stop work events have been removed from the advanced search.	NA	2017.1 MIU
Product Improvement	During a permit add, a pop-up will appear automatically after a parcel with an active stop work is selected. More .	NA	2017.1 MIU
Product Improvement	The <i>Permit Issued To</i> address is now pulling into the Inspection Results mail merge rtf report.	NA	2017.1 MIU
Warranty	Permit Complete notifications were not being sent when a permit was completed by resulting a final inspection.	5529233, 5540116, 5535689, 5592203, 5526628	2017.1 MIU
Warranty	Permits in an application created status could not be found eSuite when the <i>Permit Number</i> search field was used.	5529338	2017.1 MIU
Warranty	Permits could not be found when the Advanced search was used on the <i>Subdivision</i> field.	5535807, 5547137	2017.1 MIU

Permits			
Type	Description	Case Number	Fix Version
Warranty	The permit event history was not displaying the proper user who removed a permit stop work. The software was defaulting to the user who added the stop work.	5542368	2017.1 MIU
Warranty	Permit fees were rounding up to two decimal places.	5544888, 5546349	2017.1 MIU
Warranty	Incomplete associated permits were being saved in the database when users partially completed a permit add process, preventing master permits from being completed. Whenever a permit add process is not completed correctly, the associated permits will now be removed, allowing the master permit to be completed.	5547213	2017.1 MIU
Warranty	The <i>Inspection Date</i> in Permit Service (inspections bubble grid) was being updated to today's date whenever an inspection was updated (not resulted) in the Inspection module.	5803480	2017.1 MIU
Warranty	Permit inspections could not be seen on some permits due to having migrated vslnspectionResultReason of more than 163 characters.	5835361	2017.1 MIU
Warranty	Parcel owner and contractor information are editable in Permit Service only if the user has permission to each area.	5850203	2017.1 MIU
Warranty	Non-applicable permit fees no longer disappear from the Fees List after a permit is paid or issued.	6172741	2017.1 MIU
Warranty	Users are able to edit the fee charge amount on a paid fee in Permit Fees. The updated fee charge amount cannot be less than the calculated amount.	6173413	2017.1 MIU
Warranty	Permit Expired Notifications were sent when there was a permit notification for any status type.	6358131, 6358142, 6363170, 6376921, 637712	2017.1 MIU

Permits			
Type	Description	Case Number	Fix Version
Warranty	The permit number was not shown when permit notes were printed from the Permit edit page.	NA	2017.1 MIU
Warranty	The <i>Extend Based on Permit Activity</i> setting was not applied when inspections were completed.	NA	2017.1 MIU
Warranty	During a create permit with a different address, the Next button did not move to the Contractor tab the first time clicked.	NA	2017.1 MIU
Defect	The old stop work label has been removed.	NA	2017.1 MIU
Defect	On lower-level screen resolutions, the Permit edit bubble toolbar disappeared.	NA	2017.1 MIU
Defect	When a contractor or parcel stop work was removed, the Add Comment icon displayed next to <i>Comments</i> .	NA	2017.1 MIU
Defect	The Permit Type Cash GL Account drop-down did not allow data entry.	NA	2017.1 MIU
Defect	Canceling permits or deleting inspections from permitting was not updating the indexer.	NA	2017.1 MIU

Project Planning

Project Planning			
Type	Description	Case Number	Fix Version
Warranty	Documents in Project Planning were not opening the TCM viewer if the environment was set up for TCM.	5801606	2017.1 MIU

Reports

Reports			
Type	Description	Case Number	Fix Version
Product Improvement	Customers who have custom SSRS reports that are linked to parents types, such as cases,	NA	2017.1 MIU

Reports			
Type	Description	Case Number	Fix Version
	permits and businesses, will now see those reports as options from myInspections and the back office.		

Requests for Service

Requests for Service			
Type	Description	Case Number	Fix Version
Warranty	An <i>Assigned to Inspector</i> field has been added to Case Service in edit mode.	6065821	2018.1
Defect	The Form Letters icon has been removed from the case pages.	NA	2018.1
Product Improvement	A stop work icon will appear during the Add Case process after the selection of a service address with a stop work on its parcel. More .	NA	2017.1 MIU
Warranty	Compliance comments were missing from the Case Form Letter.	5666765	2017.1 MIU
Warranty	The Case Form Letter mail merge was missing compliance item information.	5776331, 5855587, 5868841	2017.1 MIU
Warranty	The Case Service Inquiry Activities grid was not interactive and displaying details in the General Inquiry section if re-inspections were included.	5791014	2017.1 MIU
Warranty	Case inspections were missing from the Case Form Letter.	5867390	2017.1 MIU
Warranty	The time stamp was removed from user-defined date fields in the Case Form Letter mail merge.	5910697	2017.1 MIU
Warranty	The <i>Reported by</i> field is editable on cases, including those created from the myInspections application.	5918519	2017.1 MIU
Warranty	The <i>Assigned to Inspector</i> field was re-added	6065821	2017.MIU

Requests for Service			
Type	Description	Case Number	Fix Version
	to the Case Service page. The field also was added to Case Service in edit mode.		
Warranty	The attempt to close a case through the resulting process with un-resulted inspections attached to the case caused the following error to occur: "Case cannot be made inactive until all unscheduled, requested inspections are canceled. Cancel the requested inspection and then make the case inactive."	6098492	2017.1 MIU
Warranty	Citations and compliance items were not appearing on the Case Services page.	NA	2017.1 MIU
Warranty	The Add Principle Case pop-up was not appearing during the Add Case.	5714252	2017.1MIU
Defect	On the Case form, <i>Conditional Pass</i> displayed as <i>Pass</i> in the previous inspections section.	NA	2017.1 MIU

Financial Management

The tables below contain descriptions of the Financial Management items that are part of the 2018.1 release of new world ERP.

To get software enhancements to our customers at the earliest possible availability, we provide new enhancements via MIU patches that can be downloaded and installed between releases. These enhancements are essentially "next release" enhancements delivered early. They are identified in the release notes with the previous release number and the "MIU" identifier.

For details on new features and enhancements to existing features, see "[What's New in Financial Management](#)."

Accounts Payable

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
Federal/State Compliance	Create 1099 Data - The Vendor Number will be	408252	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	inserted in the Account Number field.		
<i>Federal/State Compliance</i>	1099 Transmittal Page - Added the Final Transmission check box to the page.	408252	2017.1 MIU
<i>Federal/State Compliance</i>	Add 1099 Entry - When selecting a vendor, the vendor number will be inserted in the Account Number field.	408252	2017.1 MIU
<i>Federal/State Compliance</i>	Add 1099-R Entry - When selecting an employee, the employee number will be inserted in the Account Number field.	408252	2017.1 MIU
<i>Federal/State Compliance</i>	Import 1099 - When a vendor is assigned during the import, vendor number will be inserted in the Account Number field.	408252	2017.1 MIU
<i>Federal/State Compliance</i>	Import 1099 - When an employee is assigned during the import, the employee number will be inserted in the Account Number field.	408252	2017.1 MIU
<i>Product Improvement</i>	Accounts Payable - AP Invoice and AP P-Card Invoice Import - Added link for remote documents.	2253069	2017.1 MIU
<i>R&D</i>	AP Invoice Entry - In some situations, users were allowed to post an invoice with an journal entry that was out of bal-	5873878, 5526974	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	ance.		
<i>R&D</i>	Create 1099 Data - Enhancements were made to insert the Employee Number in the Account number field.	408252	2017.1 MIU
<i>Defect</i>	Tab Issue on Accounts Payable - Invoice Entry - When tabbing out of the Paying Bank field, a black strip was displaying and flashing on the page.	NA	2017.1 MIU
<i>Defect</i>	The Invoice Batch entry page was displaying a JavaScript error.	NA	2017.1 MIU
<i>Defect</i>	A Java Script error displays on the Invoice entry page when a purchase order(s) exists.	NA	2017.1 MIU
<i>Defect</i>	AP Invoice - Documents - When the invoice number includes a space, the Documents pop-up displays it as "%20" instead of a blank.	NA	2017.1 MIU
<i>Defect</i>	AP Invoice Entry - When user clicks Save/New Invoice, the PO Notification is incorrectly being retained from the previous invoice.	NA	2017.1 MIU
<i>Defect</i>	When a vendor was defaulted on the invoice batch header, users could not see the purchase order(s) that existed for the vendor message.	NA	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	Users had to go to the Invoice Entry page and re-enter the vendor to get the message.		
<i>Defect</i>	In the Invoice Batch List page, the full address was not displaying on hover; only the first address line was displaying.	NA	2017.1 MIU
<i>Warranty</i>	Accounts Payable Invoice Payment - After an invoice has been selected and attached to a batch, the Bank account field is disabled so it cannot be edited.	524936	2018.1 MIU
<i>Warranty</i>	Accounts Payable Invoice Entry - An Accounts Payable Item was disappearing after user clicked Save/New when an error displayed indicating that a G/L account not associated to the item is being used.	524446	2017.1 MIU
<i>Warranty</i>	1099 Transmittal file - Error message was generated when user attempted to create a transmittal file for the 2015 Tax Year and prior years.	525390	2017.1 MIU
<i>Warranty</i>	Accounts Payable Invoice Batch Validation - Errors and vendors mix up in the invoice batch Validation Message window.	5546035	2017.1 MIU
<i>Warranty</i>	Accounts Payable Invoice	5637131	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	Entry - When assigning a non-Primary Address to an invoice, the Primary Address was used when the user clicked Save.		
Warranty	Accounts Payable Invoice Report - Temporary vendor invoices were incorrectly grouped together at the end of the report by the first temporary vendor's name.	5686651, 5762570, 5782821	2017.1 MIU
Warranty	Accounts Payable Invoice Entry - When the primary address does not include the remittance address, users received an error.	5751581, 5776058	2017.1 MIU
Warranty	When a user creates a template AP invoice for a vendor and then inactivated that vendor, they could still create invoices from that template in AP Invoice Entry and the batch would still validate.	5528510	2017.1 MIU
Warranty	AP Quick Invoice Entry - Added the Delete permission to this page.	5788301	2017.1 MIU
Warranty	AP Invoice Import - User received an error when attempting to import a file created prior to FM General Patch 6.	5813470, 5818039, 5843744	2017.1 MIU
Warranty	Invoice marked as 1099 for Contract was giving the warning: "This transaction is not flagged as 1099 transaction despite	5804604	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	the fact that a 'Subject to 1099' account is part of the G/L distribution."		
<i>Warranty</i>	AP Invoice Entry/Payment Processing - Negative Cash validation is not validating against the correct G/L Cash Account.	5546920	2017.1 MIU
<i>Warranty</i>	Change AP Invoice - Users were unable to associate multiple items on the same invoice with the same PO number.	5820211	2017.1 MIU
<i>Warranty</i>	AP Invoice Entry - When the flag was not checked, the "PO Exists" message displayed when the user edited an existing invoice.	NA	2017.1 MIU
<i>Warranty</i>	AP Invoice Import - Issue when importing a multiple-item invoice and creating temporary vendor invoices.	5548972	2017.1 MIU
<i>Warranty</i>	AP Invoice Report - Project information was not being included when running in Detail mode.	NA	2017.1 MIU
<i>Warranty</i>	AP Invoice Entry - Received an error when validating an AP invoice entry batch with contracts: "This transaction has caused the contract to exceed its revised amount."	5958418	2017.1 MIU
<i>Warranty</i>	AP Payment Edit Listing - Invoices were not sorting	5963222	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	alphabetically.		
Warranty	AP Payment Edit Listing - Voided invoices incorrectly appeared twice on the listing.	5987803	2017.1 MIU
Warranty	AP Invoice Report - G/L Account and Project section headers were incorrectly repeating for each G/L Account and Project row.	6034522	2017.1 MIU
Warranty	AP Invoice Entry Batches - When attempting to post p-card batches, users received an error indicating that the system could not create off-setting G/L entries.	6074716	2017.1 MIU
Warranty	Accounts Payable - Invoice Entry Batch - When creating invoices while using the select PO tab, the remittance address was defaulting to the secondary address, even when the PO was the primary address.	524648	2017.1 MIU
Warranty	AP Invoice Payment Batch Validation - When the validation calculates discounts and the amount calculated is zero, a zero will no longer be inserted as the discount amount on the AP Invoice header.	524921	2017.1 MIU
Warranty	AP Invoice Entry - Inventory Reorder Batches -	2090265	2017.1 MIU

Accounts Payable			
Type	Description	Case Number(s)	Fix Version(s)
	When paying through AP using the select shipper page, the page was incorrectly allowing users to change the quantity.		
<i>Warranty</i>	Payment for Vendors report - Temporary Vendors were incorrectly all summed up together under the first temporary vendor.	524803	2017.1 MIU
<i>Warranty</i>	AP P-Card Import - When invoice transactions were associated with purchase orders, encumbrances were not always created correctly.	525250, 2259845	2017.1 MIU
<i>Warranty</i>	Accounts Payable Invoice Report was cutting off the last department/bank account in the report criteria area.	5650015, 40913	2017.1 MIU

Annual Budget Processing

Annual Budget Processing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	Budget Worksheet - Budget Transactions - The Number of Units was only displaying two decimal places where the screen displays four.	NA	2017.1 MIU
<i>Warranty</i>	Budget Maintenance by G/L Account - The Account Number column was not wide enough for the maximum number of	525428	2017.1 MIU

Annual Budget Processing			
Type	Description	Case Number(s)	Fix Version(s)
	characters, and since it couldn't be expanded, users could not see the entire account number.		
Warranty	Annual Budget Processing Reports - Budget Worksheet - Worksheet columns - When multiple worksheet columns appeared next to each other on the report, column breaks were being used instead of one long line across all columns.	524798	2017.1 MIU
Warranty	Annual Budget Import - The Import for Annual Budget reads "Accounts Payable Invoice Import Results" instead of "Annual Budget Import Results."	5522689	2017.1 MIU
Warranty	Budget Transaction Report - The report was not sequencing correctly by account number.	5527440, 5541992, 524136	2017.1 MIU
Warranty	Budget Worksheet - Biennial - Added an option to include Year 2 transaction amounts on the report (similar to the Budget Transaction report).	5528344, 5542000, 5635569, 411095	2017.1 MIU
Warranty	Budget Maintenance by G/L Account - Bread-crumbs returning to the wrong location and taking over a minute to get there.	5707285	2017.1 MIU

Annual Budget Processing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Budget Maintenance - Mass Change - When an authorized user clicked this button, they were navigated to a page with a message stating they do not have authority to the page.	NA	2017.1 MIU
<i>Warranty</i>	Budget Worksheet - When running the report for all organizations and accounts, the report would time out.	5827500, 5880818	2017.1 MIU
<i>Warranty</i>	The Budget Worksheet report had a performance issue.	5548263, 5526970	2017.1 MIU
<i>Warranty</i>	Annual Budget - The Print button was disappearing on the budget maintenance page.	5744220	2017.1 MIU

Asset Management

Asset Management			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Asset Transaction Report - In some instances, the report was taking a long time to complete.	525258, 2223701, 2259832	2017.1 MIU
<i>Warranty</i>	Asset Service - The search was modified so that errors do not occur when a large number of Responsible Departments exist.	525429, 2251994	2017.1 MIU
<i>Warranty</i>	Asset Transfer - When an Asset was transferred	515429	2017.1 MIU

Asset Management			
Type	Description	Case Number(s)	Fix Version(s)
	from one Accounting Category to another after Depreciation had already been done, the Accounting Category on the Write Off Depreciation Transaction was the new Accounting Category, when it should have been the old one.		
Warranty	Depreciate Assets - Manual adjustments to the Additional Depreciation field are not saving properly.	5689724, 5782167	2017.1 MIU
Warranty	Asset Depreciation - Validation - The process has been modified to improve performance.	5997481	2017.1 MIU

Bank Reconciliation

Bank Reconciliation			
Type	Description	Case Number(s)	Fix Version(s)
R&D	Bank Account Journal - When a note was attached to a journal and a notification was sent to a user, the system would incorrectly allow users to edit posted journals after they clicked on the hyperlink to the Bank account journal.	522795	2017.1 MIU
R&D	Returned Checks - Added the ability to exclude returned check transactions from Bank Recon-	NA	2017.1 MIU

Bank Reconciliation			
Type	Description	Case Number(s)	Fix Version(s)
	ciliation.		
<i>R&D</i>	The Reconcile Bank Account batch will now allow a negative entry for the initial balance.	5546897, 503733	2017.1 MIU
<i>R&D</i>	Receipt Deposit Batch Groups - Added the ability to flag these transactions so they are excluded from Bank Reconciliation.	NA	2017.1 MIU
<i>R&D</i>	Bank Account Journal Transactions - Added the ability to exclude these transactions from Bank Reconciliation.	NA	2017.1 MIU
<i>Defect</i>	Treasurer's Daily Statement - The icon to finalize a statement was not visible.	NA	2017.1 MIU
<i>Warranty</i>	Receipt Deposit Batch - When the applied for check amount was \$0.00, the page would not save and indicated "Number of checks must be zero if Check Amount Deposited is zero."	525407	2017.1 MIU
<i>Warranty</i>	Bank Account Activity Report and Bank Account Inquiry - The date range was not pulling the confirming Receipt Deposit Batch transactions accurately.	525399	2017.1 MIU
<i>Warranty</i>	Bank Account Activity Report - The Date of	525398	2017.1 MIU

Bank Reconciliation			
Type	Description	Case Number(s)	Fix Version(s)
	deposit was not displaying any data.		
Warranty	Bank Account Inquiry - Unreconciled Balances - If a check/payment was voided in a subsequent month, the amount was incorrectly removed from the previous months' unreconciled balances.	523664	2017.1 MIU
Warranty	Receipt Deposit Batch - The Confirming Receipt Deposit Batch description was not coming across to the Bank Reconciliation module.	524437, 5548635	2017.1 MIU
Warranty	Payment Register Report - Results on the report were ignoring the selected date range when Employee was selected as Payee Type.	525471	2017.1 MIU
Warranty	Removing a Bank Account Journal did not Remove the myTask, and the Journal could be accessed from myTasks and edited, validated, and approved, but didn't appear in the Bank Account Journal List.	398996	2017.1 MIU
Warranty	Open Payment Report - The report was not returning values when Employee was selected as the Payee Type.	515092	2017.1 MIU
Warranty	Reconcile Bank Accounts - Amounts paid by Check-	5530067	2017.1 MIU

Bank Reconciliation			
Type	Description	Case Number(s)	Fix Version(s)
	/EFT were doubled and causing reconciliation mis-matching.		
<i>Warranty</i>	Receipt Deposit Batch - The Deposit Date and Override G/L Date fields were not saving correctly in certain time zones.	5523378, 5523408	2017.1 MIU
<i>Warranty</i>	Receipt Deposit Batches - In some cases, Service Fee amounts collected on credit card payments were preventing the user from posting the batch.	5894467	2017.1 MIU

Contract Accounting

Contract Accounting			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	Alter Contracts - Users were able to edit the Track Retainage flag from this page, but the change was not being saved. Modifications to this flag should only be allowed via the Amend Contract Process. The flag has been disabled.	NA	2017.1 MIU
<i>Warranty</i>	Contracts - The link in the e-mail notification for a Contract Preparation Checklist Note was taking users to the home page instead of the contract itself.	5576598	2017.1 MIU
<i>Warranty</i>	Contract Amendment - The New button was	5524287	2017.1 MIU

Contract Accounting			
Type	Description	Case Number(s)	Fix Version(s)
	grayed out, preventing the user from adding a new milestone to Contracts.		
Warranty	Contract Inquiry was displaying Prenotes as Payments when viewing associated AP Invoices.	5564599	2017.1 MIU
Warranty	Retainage on contract was including amounts from voided invoices, causing the contract to run out of the retainage cap.	5544731, 5548511, 5808900	2017.1 MIU
Warranty	Contract Inquiry - The print icon was not available on this page.	5859784	2017.1 MIU

ePayments

ePayments			
Type	Description	Case Number(s)	Fix Version(s)
R&D	Updated menus to consolidate ePay options.	525170	2018.1
R&D	Updated the ePay Settings page.	525170	2018.1
R&D	Created the ePay Monitor page.	525170	2018.1
R&D	Removed asynchronize processing with the gateway provider (BridgePay, OpenEdge, and Authorize.NET) for RCC.	525170	2018.1
Warranty	The MerchantAccountCode was no longer specified in	525439, 2263395	2018.1

ePayments			
Type	Description	Case Number(s)	Fix Version(s)
	transactions; instead, BridgePay's auto merchant look-up with provided credentials was specified.		
<i>R&D</i>	Enhancements made to retrieve and save wallet key and token information in enrollment token column.	NA	2017.1 MIU
<i>R&D</i>	Updated which token is sent during RCC payment.	NA	2017.1 MIU
<i>Warranty</i>	For Recurring Credit Card and eSuite payments, the OpenEdge gateway is now TLS 1.2 compliant.	NA	2017.1 MIU
<i>Warranty</i>	Corrected an issue with Utility Management recurring credit card transactions where the wrong "Industry Tran Code" was being sent to the BridgePay gateway.	525195, 2259101	2017.1 MIU
<i>Warranty</i>	Authorize.NET - TLS 1.2 upgrade.	525564	2017.1 MIU
<i>Warranty</i>	Active Authorize.NET tokens were sometimes made inactive in New World ERP. When the UM Account holder tried to re-enroll, they received an error message saying an active enrollment already existed in Authorize.NET. This has been corrected.	5639964	2017.1 MIU
<i>Warranty</i>	Periodically, duplicate act-	5524574	2017.1 MIU

ePayments			
Type	Description	Case Number(s)	Fix Version(s)
	ive BridgePay RCC enrollments existed for a single UM RCC customer. When viewed, the two active enrollments were identical. The system only expects one active RCC enrollment per UM Account at a single time, so having duplicates created issues when the RCC transmittal file was generated.		
Warranty	In some cases where the credit card holder's name included an ampersand (&), the transaction was processed correctly by the gateway, but no receipt was created in the New World ERP Revenue Collection application. This has been corrected.	5677814	2017.1 MIU
Warranty	When saving the BridgePay eProvider Settings, the value defined as the "Site ID" was not being saved properly in the table that stores the Merchant ID associated with the Provider. As a result, customers could not complete RCC enrollment processing in 2017.1. This has been corrected.	5659428, 5753512, 5781238	2017.1 MIU
Warranty	When an eUtilities customer tried to enroll in RCC in 2017.1, the enrollment process was not	5659428, 5753512, 5781238	2017.1 MIU

ePayments			
Type	Description	Case Number(s)	Fix Version(s)
	passing the Site ID defined for the ePay Provider (BridgePay). As a result, a token was not being issued. This has been corrected.		
<i>Warranty</i>	In some cases, credit card payments processed in eSuite, specifically in eUtilities, where the consumer made a partial payment, were charged a percentage-based service fee, and the service fee was calculated on the full balance of the consumer's account, not just on the portion of the balance they were paying. This issue has been fixed.	5832341	2017.1 MIU
<i>Warranty</i>	Implemented TLS 1.2 security protocol on OpenEdge Transactions.	NA	2017.1 MIU
<i>Warranty</i>	ePay Configuration - Merchant Set Up - Using the Test button on the Merchant Information page returned the following message: "Invalid Response."	5522855, 5994208	2017.1 MIU
<i>Warranty</i>	No longer specifying MerchantAccountCode in transaction; using BridgePay's auto merchant look-up with provided credentials.	525439	2017.1 MIU
<i>Warranty</i>	Convenience Fees were not being passed to	524641	2017.1 MIU

ePayments			
Type	Description	Case Number(s)	Fix Version(s)
	BridgeComm correctly.		
Warranty	Customers on the 9.5C SP1 code stream could not process BridgePay ePayments via WebLINK.	524656	2017.1 MIU
Warranty	In BridgePay Integration, issues occurred with the Authorization Code not loading when the AdandonedTransaction service was used, so a receipt was not generated in New World ERP.	6058528	2017.1 MIU

Financial and Budgetary Reporting

Financial and Budgetary Reporting			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Fund Equity Changes Report. There was a performance issue with the report when all funds were selected. Work was done to improve the performance of the report.	525508, 2261556	2018.1
R&D	Comparative Balance Sheet - User received an error in MyReports. This occurred in both Summary and Detail modes.	NA	2017.1 MIU
Warranty	Dynamic Reports would not work when there were only three org set levels defined in the settings. When the Report Layout button was clicked, the message "The given key was not present	520332	2017.1 MIU

Financial and Budgetary Reporting			
Type	Description	Case Number(s)	Fix Version(s)
	in the dictionary" would display.		
<i>Warranty</i>	Budget Amendment Report - The "Amended Balance as of Date" was showing the Report To date when it should have shown the Report From date.	5522861, 504901	2017.1 MIU
<i>Warranty</i>	Budget Exception Report - The report was incorrectly excluding G/L accounts when the Budget amount was \$0, the Actual amount was greater than \$0, and the Threshold was set to 100% above budget.	5526902, 5528482, 5530091, 524143	2017.1 MIU
<i>Warranty</i>	When generating a "Print Selected Transactions" report, the bottom account was getting cut off on the Accounts tab.	5635783	2017.1 MIU
<i>Warranty</i>	Accumulated Transaction Report - Modifications were made to improve report performance.	5622171	2017.1 MIU
<i>Warranty</i>	Budget by Organization Report - User Based Security - Was incorrectly looking at Annual Budget Processing sub-ledger instead of General Ledger.	402082	2017.1 MIU
<i>Warranty</i>	Budget Amendments Report - The Fiscal Year shows the "Amended Bal-	5524356	2017.1 MIU

Financial and Budgetary Reporting			
Type	Description	Case Number(s)	Fix Version(s)
	ance as of" amount to be the amended balance from the Previous Fiscal Year instead of the Current Fiscal Year.		

FM Maintenance

FM Maintenance			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	Clicking the Print button on the Department List page was triggering a "Combo Error."	NA	2017.1 MIU
<i>Defect</i>	Compliance Type entry page (Maintenance > Procurement > Vendor Service) - Reset functionality was not working properly.	NA	2017.1 MIU
<i>Warranty</i>	Vendor Merge - Not all tables were being updated as part of the vendor merge process, which caused the merge to fail.	NA	2017.1 MIU
<i>Warranty</i>	Maintenance - Vendor Service - The Vendor could not be deleted immediately after it was created.	5611990	2017.1 MIU
<i>Warranty</i>	Account List - In certain circumstances, users were not able to delete accounts that were not associated with a G/L account.	5785573	2017.1 MIU

FM Maintenance			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Delete functionality was not working on the Vendor Compliance Type page in Vendor Service.	NA	2017.1 MIU

Grant Management

Grant Management			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Grant Category Budgets were displaying the wrong amounts when a user attempted to make edits and cancel.	5523405	2017.1 MIU
Warranty	Grant Management - The approval process was not working properly, preventing a grant from being awarded.	5855303	2017.1 MIU

Inquiries

Inquiries			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	G/L Account Inquiry - Detail Tab - Override Function field was incorrectly displaying the Function code and not the description.	NA	2017.1 MIU
Warranty	G/L Transaction Inquiry - Sub-ledger Detail - MB Adjustment Post transactions were incorrectly appearing multiple times.	5546914, 5546914, 525212	2017.1 MIU
Warranty	The sub-ledger detail in the G/L Transactions Inquiry for a Revenue Col-	5654863, 5523899	2017.1 MIU

Inquiries			
Type	Description	Case Number(s)	Fix Version(s)
	lections negative receipt was not displaying, even though all the sub -ledger detail could be seen when clicking the G/L Transaction Detail.		
<i>Warranty</i>	G/L Transaction Inquiry - Revenue Collections Sub Ledger Detail records were not appearing on the G/L account if the environment was not set up to "Use Receipt Deposit" batches, and the DR account on the receipt G/L distribution was not flagged as a Cash Account.	524816	2017.1 MIU
<i>Warranty</i>	G/L Transaction Inquiry - In some instances, the Search Journal feature was timing out.	5803139	2017.1 MIU

Inventory Control

Inventory Control			
Type	Description	Case Number(s)	Fix Version(s)
<i>Product Improvement</i>	The Inventory Transaction Report has been enhanced to break down net activity on inventory items to display Issue Adjustment separately from the transaction. The Adjustment Reason will also be displayed.	5545985	2017.1 MIU
<i>Software Suggestion</i>	Inventory Issue page - Added the ability to view	524011	2017.1 MIU

Inventory Control			
Type	Description	Case Number(s)	Fix Version(s)
	the quantity on hand from this page.		
<i>Defect</i>	Inventory Transaction - Adjustments - Standard adjustment was not allowing for a negative adjustment.	NA	2017.1 MIU
<i>Warranty</i>	Inventory Control Journal Batch Processing - When there were multiple effective dates for this process, the batch would appear multiple times on the Approval list page.	5527201	2017.1 MIU
<i>Warranty</i>	Receipt Adjustments was incorrectly creating an additional transaction row instead of updating the existing row.	NA	2017.1 MIU
<i>Warranty</i>	Inventory Transfer Adjustment - Added a business rule check to prevent users from entering a negative transfer amount.	NA	2017.1 MIU
<i>Warranty</i>	Counting physical inventory in receipt unit of measure when the receipt unit of measure is different than the issue unit of measure, and then posting the physical inventory batch, was causing the quantity in Facility Inquiry to be incorrect.	NA	2017.1 MIU
<i>Warranty</i>	The Inventory Value report was calculating totals incorrectly.	5545886	2017.1 MIU

Inventory Control			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	The Inventory Worksheet wasn't printing in numerical order.	5545843	2017.1 MIU
<i>Warranty</i>	Inventory Reorder Batch list - Wasn't retaining the G/L account number in the Inventory Reorder Transaction Maintenance Menu.	5524152	2017.1 MIU
<i>Warranty</i>	The auto-print feature for Inventory Issue was not working; the screen just refreshed to a new Issue and printed nothing.	5583456, 5809039, 5873379, 5902671	2017.1 MIU
<i>Warranty</i>	Inventory Journal Batch - When there was a large number of transactions in a batch, the validation was timing out while attempting to validate the budget.	5747419	2017.1 MIU
<i>Warranty</i>	Inventory Control - Physical Inventory Batch - The sorting of Inventory Location has been changed to sort by Sequence Number.	5867553	2017.1 MIU
<i>Warranty</i>	Inventory Value Report - The item number has been added to this report.	NA	2017.1 MIU
<i>Warranty</i>	Inventory Summary Report - The item number has been added to this report.	NA	2017.1 MIU
<i>Warranty</i>	Inventory Reorder Report - The item number has	NA	2017.1 MIU

Inventory Control			
Type	Description	Case Number(s)	Fix Version(s)
	been added to this report.		
Warranty	Inventory Control - Checking boxes for Requested Inventory in an order other than first-to-last in sequential order was keeping the inventory in the list and not removing it from the list of inventory requests for filling the order.	524409	2017.1 MIU
Warranty	Inventory Value Report - When creating a PDF, the header underline was incorrectly extending to the next page, causing the report to insert a blank page.	6084949, 6162604	2017.1 MIU

Journals

Journals			
Type	Description	Case Number(s)	Fix Version(s)
Defect	Journals - In some instances, the general page error was displaying.	NA	2017.1 MIU
Warranty	Journals - The Execute All function was timing out and failing to post when processing a journal in the journal list.	5711099	2017.1 MIU
Warranty	The Journal List page was generating internal error messages that were not being displayed to the user.	NA	2017.1 MIU

Journals			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Journal Import - When transactions had the same amount, project, and G/L associations, source information from the Sub Ledger Type and Sub Ledger Description fields were incorrectly being duplicated.	5546291	2017.1 MIU
<i>Warranty</i>	Journal Detail page - When attempting to edit this page on a BA journal, the system was issuing an incorrect error message: "A Project is not allowed with this G/L Account."	524139	2017.1 MIU

Miscellaneous Billing

Miscellaneous Billing			
Type	Description	Case Number(s)	Fix Version(s)
<i>R&D</i>	Miscellaneous Billing Invoice Report - When selected to include Billing Code or Transactions, all the invoice details were listed under the first Customer.	525532	2017.1 MIU
<i>Defect</i>	The Adjustment Edit Listing page would not load to allow the user to print the Edit Listing.	NA	2017.1 MIU
<i>Defect</i>	Received an object reference error when merging MB Customers.	NA	2017.1 MIU
<i>Warranty</i>	Miscellaneous Billing Invoice Form - Negative amounts entered in a Miscellaneous billing invoice were showing	511256	2017.1 MIU

Miscellaneous Billing			
Type	Description	Case Number(s)	Fix Version(s)
	up with a comma on the printed invoice.		
<i>Warranty</i>	Miscellaneous Billing Invoice Import - For Recurring Invoices - The import was not setting the Apply Late Fees flag correctly.	524222	2017.1 MIU
<i>Warranty</i>	There were overlapping check numbers when refunding a customer undesignated balance after a payment batch had been processed.	5564219	2017.1 MIU
<i>Warranty</i>	Miscellaneous Billing Adjustments - Error on post - Could not insert duplicate key row in object 'dbo.ReportUserCriteriaName' with unique index 'IX_ReportUserCriteriaName'.	5562148, 5625305, 5660567, 5647503	2017.1 MIU
<i>Warranty</i>	Miscellaneous Billing Invoice Entry - The Memo Billing check box was not displaying when Invoice Type was selected at the Batch level.	524999	2017.1 MIU
<i>Warranty</i>	The Miscellaneous Billing Adjustment Edit Listing was not showing accurate totals in the transactions section. The finance charge adjustments were not showing up.	5546639, 525209	2017.1 MIU
<i>Warranty</i>	MB Adjustments - Using the function "Reverse a Transaction Adjustment Method for Memo Invoices" would not reverse the Memo Relief transaction.	402668, 515630	2017.1 MIU
<i>Warranty</i>	Miscellaneous Bad Debt - The	523567	2017.1 MIU

Miscellaneous Billing			
Type	Description	Case Number(s)	Fix Version(s)
	system was loading a large amount of data in the bad debt batch without a problem, but when selections were made and submission attempted, an error would display: "Application uses a value of the wrong type for the current operation."		
Warranty	Miscellaneous Billing Invoice Entry - The Memo Billing check box was incorrectly being retained when Save/New was selected.	524130	2017.1 MIU
Warranty	Miscellaneous Billing Invoice Types - Users were unable to change the form type defined on late notices.	5904694	2017.1 MIU

Payment Processing

Payment Processing			
Type	Description	Case Number(s)	Fix Version(s)
Product Improvement	Positive Pay Export - Added fields to the Invoice Detail portion of this file for net invoice amount, sales tax, freight, discount, and retainage.	5725610	2017.1 MIU
Warranty	Payment Inquiry - Incorrect results were returned when searching by Check-/EFT number.	5549019, 5549019, 524398	2017.1 MIU
Warranty	Payment Transaction Inquiry was not displaying the correct Cash account.	5800863	2017.1 MIU

Payment Processing			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	The hyperlinks in the myTasks area for 3rd Party Payments did not have complete URL information. The URLs for other myTasks specify a page, whereas the URL for TPP specified a directory.	5522733	2017.1 MIU

Process Manager

Process Manager			
Type	Description	Case Number(s)	Fix Version(s)
Defect	Process Manager - Purchasing (and others) - An error would display when the user clicked the Approval Routing Rules icon and then selected New.	NA	2017.1 MIU
Warranty	The system carried forward the Exceptions for Routing Rules for Modified Departments when Copy Effective Date was applied on the process.	5771164, 5774749, 5822651, 5832799, 5837673	2017.1 MIU
Warranty	System was looking at the Effective End Date instead of the Effective Start Date for displaying Routing Rules and Exceptions for Modified Departments.	5771164, 5774749, 5822651, 5832799, 5837673	2017.1 MIU
Warranty	Process Manager - In some cases, duplicate effective dated rows were being created for a department/process.	5774749	2017.1 MIU

Project Accounting

Project Accounting			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	Project Maintenance - G/L accounts from one project code were being incorrectly attached to new project codes.	NA	2017.1 MIU
<i>Defect</i>	The Project Listing report had a long-running script.	NA	2017.1 MIU
<i>Defect</i>	The Project Listing Report in 2017.1 was not behaving as it did in 9.5 SP1 in regard to the Search Criteria option.	NA	2017.1 MIU
<i>Warranty</i>	Was unable to filter by projects in Project Transaction Report. In some instances, users were unable to filter by projects.	NA	2017.1 MIU
<i>Warranty</i>	Project Journals - Object reference was not set to an instance of an object error received in approval.	5546656	2017.1 MIU
<i>Warranty</i>	Project Maintenance - Documents - When attaching a document to a project, the system was assigning the wrong project identifier to the document.	524535	2017.1 MIU
<i>Warranty</i>	Project Journal - Documents - User was unable to attach documents due to incorrect security permission.	524919	2017.1 MIU

Purchasing

Purchasing			
Type	Description	Case Number(s)	Fix Version(s)
<i>R&D</i>	Email PO Notifications - Added the ability to specify whether to send Fully Approved and/or Posted Internal notifications.	NA	2017.1 MIU
<i>Defect</i>	Purchase orders with multiple items included only the amount from one item in the email.	NA	2017.1 MIU
<i>Defect</i>	Purchase order notifications were emailing inactive users.	NA	2017.1 MIU
<i>Warranty</i>	Purchase Order Entry - Contract Items - If the PO description included a "#" symbol, the user was getting an error message.	525393	2017.1 MIU
<i>Warranty</i>	When a PO with only one item was brought into the Change PO Process and the Item was completed, and then a "Contract Item" was added to the PO, the entire PO was voided.	5671165	2017.1 MIU
<i>Warranty</i>	Change PO - When making modifications to a PO, the Reason Code text box will now require users to save their changes prior to adding information to this box.	5523387	2017.1 MIU
<i>Warranty</i>	Purchase Order Report - When exporting to excel, the amount fields were incorrectly including an extra decimal.	5584641	2017.1 MIU

Purchasing			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	If a Purchase Order with multiple line items was printed, multiple versions of the form were generated with each line item printing multiple times. For example, if a Purchase Order with three line items were printed, instead of getting one PO with the three line items, the user was getting three copies of the purchase order, and each of the three line items printed three times on the purchase order. This problem has been corrected.	5878581, 5878581, 5878734, 5879682, 5881291, 5882165, 5883931, 5884649, 5884907	2017.1 MIU
Warranty	Change Purchase Order - The "Complete PO" process was incorrectly relieving the full carried-forward Budget Adjustment amount instead of the remaining balance on soft closed purchase orders.	5550136	2017.1 MIU

Receipt of Goods

Receipt of Goods			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Receipt of Goods - Enhancements were made to better display shipper records on the Receipt of Goods page.	5889936	2017.1 MIU

Requisition Processing

Requisition Processing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Requisition Inquiry - Total Cost and Amount Encumbered incorrectly included canceled items.	5526962, 5530327	2017.1 MIU
<i>Warranty</i>	Purchasing - Requisition - Approval process created Multiple entries showing in myTasks for the same task when Approval Routing is used. It was fixed to display only one entry per Requisition for all the items included in the requisition.	524531	2017.1 MIU

Revenue Collections

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Revenue Collection - Print Receipt - When convenience fees were collected on a credit card payment, two credit payments were recorded in the ReceiptPayment table.	NA	2018.1
<i>Product Improvement</i>	Revenue Collection Station Maintenance page - Added the Check Validation Vertical Spacing field.	5523456, 5528911, 5529847, 5530426, 5533988, 5542299, 5546731, 5548865, 5636006, 5805811, 6006072, 507348, 5529847, 5805811	2017.1 MIU
<i>Product Improvement</i>	Revenue Collection Station Listing - Added the Check Validation Vertical Spacing control to this report.	5523456, 5528911, 5529847, 5530426, 5533988, 5542299, 5546731, 5548865, 5636006, 5805811,	2017.1 MIU

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
		6006072, 507348, 5529847, 5805811	
<i>Product Improvement</i>	Receipt Entry - Slip printer - Modified the check validation print to look at the new control to determine the vertical spacing.	5523456, 5528911, 5529847, 5530426, 5533988, 5542299, 5546731, 5548865, 5636006, 5805811, 6006072, 507348, 5529847, 5805811	2017.1 MIU
<i>R&D</i>	Added the Receipt Transaction description to the interface.	5688092	2017.1 MIU
<i>R&D</i>	Fixed errors on the Tyler Cashiering Payment Codes page that occurred when saving a valid EnerGov Cashier.	5688092	2017.1 MIU
<i>Defect</i>	Import Revenue Collections Receipts - If multiple Receipt Import Types existed, the import would pull all of them into the process to determine the mapping configuration, not just the mapping configuration from the specific receipt import being processed. Unless the receipt import being processed was the first one on the list, the mapping applied to the import was incorrect.	NA	2017.1 MIU
<i>Defect</i>	Could not see Change Receipt in the drop-down list after giving permissions.	NA	2017.1 MIU

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	The request filtering module was configured to deny a request where the query string is too long. Error when processing Change Receipts.	NA	2017.1 MIU
<i>Defect</i>	The Change Receipt Edit and Post Listings showed different data when they should have been the same.	NA	2017.1 MIU
<i>Defect</i>	Change Receipt - On the first printing, the Edit Listing came up unauthenticated.	NA	2017.1 MIU
<i>Defect</i>	Received the message "Not authorized to this page" when adding a Change Receipt with certain license keys.	NA	2017.1 MIU
<i>Defect</i>	Change Receipt Edit Listing - "Received From" was misspelled "Received From."	NA	2017.1 MIU
<i>Defect</i>	Change Receipt Editing Listing pop-up window - Project Information was added as a column on the transaction line.	NA	2017.1 MIU
<i>Defect</i>	Revenue Collection Station Listing - When converted to PDF, the column header line and first line of data had no spacing between them.	NA	2017.1 MIU
<i>Defect</i>	A warning was displaying when a user edited an	NA	2017.1 MIU

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
	existing Collection Station for Slip Printer and clicked Save/New.		
<i>Defect</i>	The header and footer values were not being retained when a user would create a new Collection Station for Slip Printer and click Save/New.	NA	2017.1 MIU
<i>Defect</i>	Receipt Entry Slip Printer Check Validation - When the Check Validation Alignment was set to Left, it was printing Left and Centered, and was not printing from the Left.	NA	2017.1 MIU
<i>Defect</i>	Receipt Entry Slip Printer Check Validation - When using the maximum character limit, the first eight or so characters were being cut off.	NA	2017.1 MIU
<i>Defect</i>	Revenue Collection Batch - Summary Tab - Wire Transfer was renamed EFT.	NA	2017.1 MIU
<i>Warranty</i>	Re-assigning an IP address on a collection station to an existing IP address was causing the collection station to be renamed to the collection station with the same IP address.	5525368	2017.1 MIU
<i>Warranty</i>	The Change Receipt Edit Listing and Pop-up Win-	NA	2017.1 MIU

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
	dow - The Current Project Information was listing the same information as the to, after the to was changed.		
Warranty	An error message would display when a user attempted to change the G/L Distribution on a receipt through the Change Receipt Process.	5656349	2017.1 MIU
Warranty	Revenue Collections Slip Receipt for non Sub Ledger Receipts was not printing the Transaction Description field.	5546445, 5750618, 5798270, 5813885, 5826916, 5844825, 5860501	2017.1 MIU
Warranty	Revenue Collections - Print Receipt - In some cases, receipts were being generated without displaying the service fee amount collected.	5523148, 5546086, 5745367	2017.1 MIU
Warranty	Revenue Collections - Slip Printer Receipts - The UM Remaining Balance was taking up multiple lines on the receipt.	5529075, 5530859, 5547909, 5638155, 5694072	2017.1 MIU
Warranty	Change Receipt - User was unable to delete G/L distributions. Check box was disabled.	5838728	2017.1 MIU
Warranty	Payment Codes - In some cases, when users maintained a "Third Party Receivables" type code, the Third Party Process field entry was incorrectly	5539609	2017.1 MIU

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
	overridden with another entry that existed on the list, which was not already associated with another payment code.		
Warranty	Receipt Entry - Deposit Batch Type - The size of the "Payment Code" column has been increased to display the full code and description.	5545982, 5902781, 5545920, 404820	2017.1 MIU
Warranty	Revenue Collection - Receipt Entry - When adding multiple transactions using a Barcode form, the user received a "Navigate away" pop-up for all transactions after the first.	5544854	2017.1 MIU
Warranty	Revenue Collection Receipt page - The tab order on the Receipt page wasn't flowing the way it used to, for example, the cursor seemed to get lost after entering a payment code. There was similar behavior in the Payments section.	5544854	2017.1 MIU
Warranty	A Revenue Collection Receipt with a Payment Code that has a Service Fee was not calculating the Service Fee if it had cents in it, and only worked if the Transaction Amount was a whole amount.	524671	2017.1 MIU

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Receipt Entry - When editing a receipt with multiple transactions and payments, the system was issuing a "General Error" message when the user attempted to save.	524738	2017.1 MIU
Warranty	Print Receipts - Pass through service fees were not printing on the receipt.	524949	2017.1 MIU

Special Assessments

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
R&D	SA Billing - Added the ability to generate bills for External Districts.	NA	2018.1
R&D	Added the ability to view the payoff amount calculation for External Districts.	NA	2017.1 MIU
R&D	Prep Roll District - Improved the performance issue that occurred when there was a large number of parcels on the district.	525620	2017.1 MIU
R&D	Prep Roll District - Enhancements have been made to display a validation error message when any parcel in the district has an assessment amount less than or equal to \$0.00. Also, the G/L Distribution entries are now	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
	being created accurately when a Prep Roll District is posted.		
R&D	Special Assessment Listing Report - The report now displays the district and parcel information accurately for External Districts.	NA	2017.1 MIU
R&D	SA Prep / Active Roll External District - Removed the Assessment Per Unit Measure section on Parcel Entry page.	NA	2017.1 MIU
R&D	SA Prep Roll District - Added a validation error message that will display when Assessment Amount on parcel is not equal to the Assessment Amount for one or more parcels.	NA	2017.1 MIU
R&D	Added the ability to cancel changes on the confirmation message that displays when a user wants to cancel the changes for a First Bill Date, Assessment Start Date, Number of Installments, or Billing Frequency for an External District.	NA	2017.1 MIU
R&D	SA District/Parcel Inquiry - Enhancements were made to make the Unbilled Interest Amount for External District	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
	update based on the Installment Schedule.		
<i>R&D</i>	SA Adjustments Form Letter - Corrected an issue with the amount displayed for the Principal Balance column.	NA	2017.1 MIU
<i>R&D</i>	SA Prep Roll District - Enhancements were made to make the Total Assessment Amount for the parcel equal the total of Principal amounts entered in the Installment Schedule.	NA	2017.1 MIU
<i>R&D</i>	SA Prep Roll External District - Added the ability to cancel the changes on the confirmation message if the user changes the number of installments after entering the installment schedule.	NA	2017.1 MIU
<i>Defect</i>	The Special Assessments Delinquent Interest Calculation was inaccurate when more than one payment installment was past due.	NA	2017.1 MIU
<i>Defect</i>	The parcel mask was applied throughout the SA application to all the pages that showed the parcel number, but none of the reports, listings, or form letters were updated.	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	The tab order on the Special Assessments entry pages (both Prep Roll and Active Roll entry) were incorrect.	NA	2017.1 MIU
<i>Defect</i>	The Prep Roll District Delinquent Interest Rate couldn't be 100.00 per-cent.	NA	2017.1 MIU
<i>Defect</i>	The Special Assessments General Ledger Distribution Report Page Break Level was not working.	NA	2017.1 MIU
<i>Defect</i>	Special Assessments Inquiry - Special Assessments Billing - Delinquent interest was not calculating accurately.	NA	2017.1 MIU
<i>Defect</i>	The tab order was incorrect on the Special Assessments Prep Roll and Active Roll entry pages.	NA	2017.1 MIU
<i>Defect</i>	Users could save the Total Number of Installments field value without an entry on External District, which resulted in "1-" being displayed and an error generated in the parcel.	NA	2017.1 MIU
<i>Defect</i>	Adjustments were combining principal and interest amounts on one line for External Districts.	NA	2017.1 MIU
<i>Defect</i>	On Parcel entry, when a user changed the Assess-	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
	ment Amount and clicked Save, a "Navigate away from page" message displayed, and the change did not appear to be saved.		
<i>Defect</i>	The External District Installment Schedule total amounts for Parcel entry was not right-aligned like the other money columns.	NA	2017.1 MIU
<i>Defect</i>	Adjustments Reverse Transaction - User was unable to update the Parcel ID.	NA	2017.1 MIU
<i>Defect</i>	Adjustments - Filtering in Invoice and Receipt Number does not work for last step.	NA	2017.1 MIU
<i>Defect</i>	Users were unable to search by parcel on the District/Parcel Inquiry page.	NA	2017.1 MIU
<i>Defect</i>	Delinquent Type - No error message displayed when a user attempted to delete a Delinquent Type that was in use.	NA	2017.1 MIU
<i>Warranty</i>	Delinquent Batch - Edit and Post Listing Report - The waived District-Parcel roles were filtered out of the report.	NA	2017.1 MIU
<i>Warranty</i>	Delinquent Fee Type - Added the ability to select whether a percentage	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
	based fee will apply to the full bill amount or the unpaid remaining balance.		
Warranty	Fixed performance issue pertaining to districts with more than 5,000 parcels.	525620	2017.1 MIU
Warranty	Adjustments - The Adjust Customer Undesignated Balance feature was adding the Adjusted value instead of the Net Change value.	NA	2017.1 MIU
Warranty	Special Assessments - Parcel Inquiry pop-up page - The Notes and Documents icons were not working properly.	NA	2017.1 MIU
Warranty	Adjustments - User was not able to select an invoice while reversing a payment transaction.	NA	2017.1 MIU
Warranty	Add Adjustments - The Reverse Transactions grid was displaying consolidated information for the transactions associated with the payment.	NA	2017.1 MIU
Warranty	The Notes and Documents icons were not working on the Parcels List grid on the District/Parcel Inquiry page.	5562540	2017.1 MIU
Warranty	Listing Report - Enhancements were made to exclude unposted parcels	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
	that were added through Adjustments.		
<i>Warranty</i>	Adjustments Reverse Transaction Payment - Step 2 - Receipt drop-down was not showing the proper data.	NA	2017.1 MIU
<i>Warranty</i>	Special Assessment Add Adjustments - The Reverse Transactions grid will display consolidated information for the transactions associated with the payment.	NA	2017.1 MIU
<i>Warranty</i>	Added the ability to save the Adjustment Reason.	NA	2017.1 MIU
<i>Warranty</i>	Adjustments - The Edit and Post Listing reports were not displaying the transactions accurately when returning a payment that paid multiple invoices.	NA	2017.1 MIU
<i>Warranty</i>	Special Assessments - Delinquent Notice Forms - The Last Invoice Account Fee was incorrectly displaying as "0" (zero) and was not included in the Payoff Amount.	NA	2017.1 MIU
<i>Warranty</i>	SA District/Parcel Inquiry - Enhancements have been made to display on the Transactions grid the payment allocations to multiple Fees and Penalties being applied to the parcel.	NA	2017.1 MIU

Special Assessments			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Enhancements have been made to display billed and unbilled interest correctly for dynamic districts for various billing frequencies and calculation time.	NA	2017.1 MIU
<i>Warranty</i>	SA District/Parcel Inquiry - Enhancements have been made to correctly display the Unbilled and Billed Interest for Dynamic districts when Billing and calculation frequencies are different.	NA	2017.1 MIU
<i>Warranty</i>	Special Assessments - Find & Create Bills in District Billing List was timing out. Users were unable to create bills.	6118758	2017.1 MIU
<i>Warranty</i>	On the Active Roll District Edit page, the user had the ability to modify the Default Assessment Amount per Parcel field, but the field should have been grayed out.	NA	2017.1 MIU

Tyler Cashiering

Tyler Cashiering			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	Tyler Cashiering - The New World ERP web service was modified to accept receipts where the tender amount is greater than the sum of the trans-	NA	2018.1

Tyler Cashiering			
Type	Description	Case Number(s)	Fix Version(s)
	action amounts.		
<i>Warranty</i>	In some cases, not all outstanding license renewals were available to be paid in Tyler Cashiering. If the license renewal was previously paid in full and subsequently adjusted in a way that an outstanding balance remained, the license renewal could no longer be paid in Tyler Cashiering. This issue has been corrected.	5801390	2017.1 MIU

Tyler Forms

Tyler Forms			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Tyler Forms - Certain forms were printing two ampersands (&) when the text contained a single ampersand.	NA	2017.1 MIU

Voucher Requisitions

Voucher Requisitions			
Type	Description	Case Number(s)	Fix Version(s)
<i>Defect</i>	Voucher requisition was showing up under the Purchase Requisition Approvals page and vice versa.	NA	2017.1 MIU
<i>Warranty</i>	Voucher Entry - Commodity contracts with a specific item price per unit (1K of a dollar) was	5907866	2017.1 MIU

Voucher Requisitions			
Type	Description	Case Number(s)	Fix Version(s)
	causing the resulting voucher to not validate.		

Work Orders

Work Orders			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Work Orders - Job Codes - All the data entered in the G/L org set fields were not displayed.	5545923	2017.1 MIU
Warranty	UDF information was not showing on Work Order Listing Report.	5523423	2017.1 MIU
Warranty	Work Orders - Create Request for Action and Create Work Order - If a request or work order was created and linked to an asset associated with a parcel, the parcel information was not being recorded on the request or work order. As a result, the requests and work orders were not visible in the GIS/Mapview of Requests or Work Orders.	NA	2017.1 MIU
Warranty	In GIS Mapping, only work orders and RFAs specifically associated with a Parcel ID are mapped.	NA	2017.1 MIU

Year-End Processing

Year-End Processing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Federal/State Compliance</i>	Added support for corrected and omitted Vendor 1099 forms.	408252	2017.1 MIU
<i>Federal/State Compliance</i>	2017 - 1099 Import File changes for 1099-S - The file import has been modified. A new check box has been added as box 5 to report the transfer of real estate by a foreign person. The previous box 5, namely Buyer's Part of Real Estate Tax, is now box 6.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	2017 - 1099 Transmittal File - Added changes for the state of Vermont.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	2017 - 1099 import file warnings and errors have been updated to be more consistent.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	1099 Processing - Updates for 2017 forms.	NA	2017.1 MIU
<i>Defect</i>	Soft Close PO G/L Entries Edit Listing - The G/L account Description was including the Org set levels, when it should only display the Base/Detail account description.	NA	2017.1 MIU
<i>Defect</i>	2017 - 1099 Company List Page - Clicking Save/New from the 1099 Types tab was taking users to a new, blank 1099 Types page instead of the General tab.	NA	2017.1 MIU

Year-End Processing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	CAFR Statement Builder Export - When an override function exists at the G/L account level, the export was not overriding the G/L org function as it should.	NA	2017.1 MIU
<i>Warranty</i>	CAFR Statement Builder Export: Add Reclass Journal amounts to the Beginning Balance for Balance Sheet accounts.	NA	2017.1 MIU
<i>Warranty</i>	2017 - 1099 Import - When Merge With Existing 1099s is checked, a Vendor was not being associated with the 1099 record when using a Payee Identification Number Type other than 1 (Vendor Number).	5527272	2017.1 MIU
<i>Warranty</i>	1099 Transmittal page - At certain resolutions, when checking the Combined Federal/State reporting box, a user was unable to scroll to display the buttons.	NA	2017.1 MIU
<i>Warranty</i>	2017 - 1099 Company List Page - The Reporting Company was not being saved when it was included on the 1099 Company.	NA	2017.1 MIU
<i>Warranty</i>	2017 - Form 1099-R Copy 2 Backer - An option was missing from the print forms drop-	5989127	2017.1 MIU

Year-End Processing			
Type	Description	Case Number(s)	Fix Version(s)
	down.		
Warranty	2017 - 1099 Transmittal File - The Only Include Box 7 and Exclude Box 7 options were not filtering correctly.	5990070	2017.1 MIU
Warranty	2017 - 1099 Transmittal File - In certain situations, when the Exceeding Minimum check box was selected, the export file was not including any records.	NA	2017.1 MIU
Warranty	Vendor 1099 Processing - When attempting to print forms for and prior to 2015, users were receiving an error in myReports.	6011637	2017.1 MIU
Warranty	Vendor 1099 Register - User received an error when attempting to create a report for Tax Year 2015 or earlier.	6022429	2017.1 MIU

Human Resources

The tables below contain descriptions of the Human Resources items that are part of the 2018.1 release of new world ERP.

To get software enhancements to our customers at the earliest possible availability, we provide new enhancements via MIU patches that can be downloaded and installed between releases. These enhancements are essentially “next release” enhancements delivered early. They are identified in the release notes with the previous release number and the “MIU” identifier.

For details on new features and enhancements to existing features, see "[What's New in Human Resources](#)."

Benefits Administration

Benefits Administration			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The benefit plan Enrollment button needed a better message.	NA	2017.1 MIU
<i>Warranty</i>	<i>Override</i> has been changed to <i>Employee Contribution</i> on HSA enrollment in Workforce.	5590555	2017.1 MIU
<i>Warranty</i>	HSA bank account information will be carried over to the new enrollment year during the open enrollment process. It also will be pulled into eBenefits with the new enrollment period.	5853705	2017.1 MIU
<i>Warranty</i>	HSA bank account information will be pulled into eBenefits with the new enrollment period.	5853705	2017.1 MIU
<i>Warranty</i>	The <i>Override</i> field in HSA is the limit for the employee contribution only. The year-to-date limit will use the check date to determine the year period for the limit.	5862637, 5531766	2017.1 MIU
<i>Warranty</i>	The HSA year-to-date limit will use the check date instead of the period-end date to identify the year-to-date limit.	5879138, 5949538	2017.1 MIU
<i>Warranty</i>	When multiple HSA categories exist, the year-to-date limits will not be combined across categories. Each category will use the year-to-date limit assigned at the category/plan/employee level.	5938656	2017.1 MIU
<i>Warranty</i>	Life insurance benefit plans will allow the user to toggle the <i>Age as of Date</i> between Period End Date and Specific Date without error.	6031233	2017.1 MIU
<i>Warranty</i>	If a benefit plan coverage, start or enrollment date is greater than one year from today's date, a warning is generated when the record is saved.	NA	2017.1 MIU
<i>Defect</i>	When the benefit plan is HSA, January is default-	NA	2017.1

Benefits Administration			
Type	Description	Case Number	Fix Version
	ted in the <i>YTD Limit Start Month</i> , and the field is disabled.		MIU
<i>Defect</i>	The Benefits Administration Future Enrollment Report did not include <i>Decline</i> employees.	NA	2017.1 MIU
<i>Defect</i>	The STD premium amount was not pulling into the enrollment batch from eBenefits.	NA	2017.1 MIU

eAdministration

eAdministration			
Type	Description	Case Number	Fix Version
<i>Defect</i>	Custom content for the Direct Deposit Deactivation Message was not working.	NA	2017.1 MIU

eBenefits Administration

eBenefits Administration			
Type	Description	Case Number	Fix Version
<i>Warranty</i>	Benefit plans will use the check date to determine the year-to-date limit.	5526672, 5527863	2017.1 MIU
<i>Warranty</i>	<i>Deductible</i> was spelled incorrectly on the HSA enrollment page.	5826342	2017.1 MIU
<i>Warranty</i>	In eBenefit Plan Enrollment, the HTML code for ampersand (&) is repeated in the plan name when saved.	5840410	2017.1 MIU
<i>Warranty</i>	eBenefit enrollment will allow for first time elections into LTD/STD benefit plans.	5841900	2017.1 MIU
<i>Warranty</i>	eBenefits no longer generates an error when an employee ends a qualifying HSA plan and enrolls in a qualifying FSA plan in the same enrollment batch.	5862790	2017.1 MIU
<i>Defect</i>	Enrollment in HSA plans no longer is affected by enrollment in dental or vision.	NA	2017.1 MIU

eBenefits Administration			
Type	Description	Case Number	Fix Version
<i>Defect</i>	The eSuite Benefit Confirmation Statement was missing a name in 2017.1.	NA	2017.1 MIU
<i>Defect</i>	Enrollment did not use the over age 55 catchup max for HSA.	NA	2017.1 MIU
<i>Defect</i>	An error occurred when an employee did not have enrollment categories in the New World ERP batch.	NA	2017.1 MIU
<i>Defect</i>	When prior HSA enrollment information was not available, the bank account was not populated on the HSA enrollment page, generating an error.	NA	2017.1 MIU

eEmployee

eEmployee			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The eEmployee module supports federal W-4 change requests. More .	NA	2018.1
<i>Product Improvement</i>	The Accrual Information page has been enhanced to show time off history and the aggregate number of hours taken. More .	NA	2018.1
<i>Product Improvement</i>	An <i>Upload Documents</i> option has been added to the MY HR menu. More .		
<i>Product Improvement</i>	A document upload feature has been added to eDirect Deposits to let employees attach direct deposit slips or voided checks to direct deposit change requests. More .	NA	2018.1
<i>Product Improvement</i>	The benefits, deductions and taxes pages have been modified to display active information by default, with inactive or unused data collapsed under a history heading. More .	NA	2018.1
<i>Product Improvement</i>	Check boxes have been added to the Print W-2 Forms and Print 1095-C Forms pages in eSuite MY HR to give employees with primary email addresses set up in Workforce Administration	NA	2018.1

eEmployee			
Type	Description	Case Number	Fix Version
	the option to have their forms delivered electronically. More .		
<i>Software Suggestion</i>	The ability to select <i>Allow Disable Direct Deposit</i> has been added to eAdministration and MyHR Direct Deposit. More .	NA	2018.1
<i>Warranty</i>	The NWS user was being used for Workforce Administration-Dependent Security.	5540874	2017.1 MIU
<i>Warranty</i>	Requests for direct deposit can be approved.	5649914, 5593714, 5611965	2017.1 MIU
<i>Warranty</i>	Reissued checks were showing the original bank information.	5720147	2017.1 MIU
<i>Warranty</i>	The Position and Pay Rate section in eHR will display the employee hire date accurately in Workforce.	5893252	2017.1 MIU
<i>Warranty</i>	Paperless flags were not saving when SSL was used.	5934445	2017.1 MIU
<i>Warranty</i>	In Personal Information, a name with special characters resulted in a runtime/server error when a change was submitted.	5970402	2017.1 MIU
<i>Warranty</i>	Approving with multiple levels will no longer create duplicate records.	6034040	2017.1 MIU
<i>Warranty</i>	An address change from eSuite correctly will set an address to primary.	NA	2017.1 MIU
<i>Warranty</i>	Duplicate email addresses and phone numbers were created when a request was submitted from eSuite.	NA	2017.1 MIU
<i>Defect</i>	Adding an <i>Emergency Contact</i> in 2017.1 defaults a <i>Birth Date</i> .	NA	2017.1 MIU
<i>Defect</i>	Printing 1095-Cs in eSuite generated a "Missing PDF file" error message.	NA	2017.1 MIU
<i>Defect</i>	<i>Check Amount</i> and <i>Reissued Check Amount</i> have been added.	NA	2017.1 MIU

eEmployee			
Type	Description	Case Number	Fix Version
Defect	eSuite Print Paycheck was not refreshing the cache, causing the wrong employee to be selected.	NA	2017.1 MIU
Defect	The eSuite HR Security components needed to be synchronized.	NA	2017.1 MIU

eHR

eHR			
Type	Description	Case Number	Fix Version
Warranty	eAdministration was not enabling the paperless flags correctly.	5960888	2017.1 MIU

Employment Event Tracking

Employment Event Tracking			
Type	Description	Case Number	Fix Version
Defect	Grievance Arbitration could not be added due to a permission failure.	NA	2017.1 MIU

eTimesheets

eTimesheets			
Type	Description	Case Number	Fix Version
Warranty	The <i>Project</i> drop-down needed to display up to 244 characters.	NA	2017.1 MIU
Defect	Selecting All Departments with All Statuses in time approvals caused a server error message.	NA	2017.1 MIU
Defect	Load Schedule was not validating premium time.	NA	2017.1 MIU
Defect	Future-dated employees caused an error on the submission of eTimesheets.	NA	2017.1 MIU

Inquiries

Inquiries			
Type	Description	Case Number	Fix Version
Product Improvement	To show clearly what stage a paycheck is in, Reissued, Not Reconciled and Reconciled statuses have been added to the <i>Status</i> column of the Payments History grid. More .	NA	2017.1 MIU
Product Improvement	Employee Change Requests has been added as a function on the User-Based Security page. More .	NA	2018.1
Warranty	The entries in Hours History are now sorted in descending order.	5539170	2017.1 MIU
Warranty	An error occurred during the attempt to view employee check information after a reissue.	6024477	2017.1 MIU
Warranty	The general ledger detail was showing double entries for every employee who had a longevity (separate) check.	NA	2017.1 MIU
Warranty	The general ledger detail was double the amount of the payroll transaction posted.	NA	2017.1 MIU
Defect	Partial direct deposits were not showing in Employee Payment Inquiry.	NA	2017.1 MIU
Defect	A reissued EFT showed the direct deposit information twice on the reissued check.	NA	2017.1 MIU
Defect	<i>Check Amount</i> has been added to the payment.	NA	2017.1 MIU
Defect	<i>Check Amount</i> was using four decimals instead of two.	NA	2017.1 MIU

Maintenance

Maintenance			
Type	Description	Case Number	Fix Version
Product Improvement	<i>Employee Change Requests</i> has been added as a <i>Function</i> on the User-Based Security page. More .	NA	2018.1
Warranty	The Position page in Position Control displayed	5523070	2018.1

Maintenance			
Type	Description	Case Number	Fix Version
	the following error when there were at least two G/L distributions: "Organization set is required."		
Defect	On benefits that are a percent of deductions, only the selection of deductions not in a benefit plan is allowed.	NA	2018.1
Product Improvement	» An option for Percent of Deduction has been added to the benefit calculation methods. » The Benefit Listing has been updated to include the Percent of Deduction calculation method. » The payroll calculation has been updated to calculate a benefit as a percent of a deduction. More.	5550023	2017.1 MIU
Warranty	On the Pay Batch List page, the Delete button was disabled unless the status was Uninitialized .	5522687	2017.1 MIU
Warranty	The Accrual Profile page displayed an error saying a payoff hours code was required when it already was selected.	5523101	2017.1 MIU
Warranty	Grade steps without sequence numbers were causing errors in the RabbitMQ log.	5528875	2017.1 MIU
Warranty	The calculate accruals percent was incorrectly using the the step-qualifying end date value instead of the actual hours based on the end date value.	5550362	2017.1 MIU
Warranty	The benefits, deductions, taxes and hours codes export function is working properly.	5680625, 6038210	2017.1 MIU
Warranty	The Job Events page adds records with the correct validations without replacing existing records.	5701812	2017.1 MIU
Warranty	The employer tax was allowing a save when the account and full general ledger account were	NA	2017.1 MIU

Maintenance			
Type	Description	Case Number	Fix Version
	used, causing an error in payroll validation.		
Warranty	The Human Resources Reporting Maintenance installation has been updated to deploy the Audit Report, Initial Measurement and Standard Reporting.	NA	2017.1 MIU
Warranty	The forward/backward arrows for the shift code <i>Effective Date</i> field did not navigate correctly.	NA	2017.1 MIU
Warranty	A future effective pay grade could not be used on a new position.	NA	2017.1 MIU
Defect	The export data function from the Position List did not generate a pop-up to download and save the position data.	NA	2017.1 MIU
Defect	Printing the Frequency List generated a JavaScript error.	NA	2017.1 MIU
Defect	Printing the Hours Category List generated a JavaScript error.	NA	2017.1 MIU
Defect	Create Event displayed the following error on Personnel Action Codes: "At least one section in Personnel Action Sections must be selected for edit."	NA	2017.1 MIU
Defect	The new Job Event Maintenance grid was allowing a <i>Job Event Reason ID</i> to be selected.	NA	2017.1 MIU
Defect	The following error occurred: "Data has been changed by {User}. Click Reset to load the data from the most current record."		2017.1 MIU
Defect	On benefits that are a percent of deductions, only the selection of deductions not in a benefit plan is allowed.	NA	2017.1 MIU

Non-Employee

Non-Employee			
Type	Description	Case Number	Fix Version
Warranty	Non-Employee Service required an email address if the user tried to remove one.	5524848, 5549293	2017.1 MIU
Warranty	In Non-Employee Service, a secondary address could not be deleted when it was nor primary or required.	5858511	2017.1 MIU
Warranty	When an employee retired and was added to Non-Employee Service, the benefit group was not saved properly.	NA	2017.1 MIU
Defect	A non-employee could not be added to an open enrollment batch due to a permission failure.	NA	2017.1 MIU
Defect	A non-employee benefit plan could not be copied in 2017.1.	NA	2017.1 MIU

Payroll Administrator Tasks

Payroll Administrator Tasks			
Type	Description	Case Number	Fix Version
Warranty	Import Deduction Data and Import Benefit Data did not import negative deductions.	5649485	2017.1 MIU
Warranty	Errors occurred in the import hours process of Adjustment Processing.	5686653	2017.1 MIU
Defect	The deduction import would not handle an import file if all fields were not represented by commas.	NA	2017.1 MIU
Defect	The Import Benefit Edit Listing <i>Amount</i> had too many decimals. It should have only 2.	NA	2017.1 MIU

Payroll Hours

Payroll Hours			
Type	Description	Case Number	Fix Version
Warranty	When holiday time is created, the pay rate used will be the pay rate as of the holiday.	5539173	2017.1 MIU
Warranty	In Hours Code Hours Entry, the percentage hours	5611657	2017.1

Payroll Hours			
Type	Description	Case Number	Fix Version
	code disappeared after an accrual balance override warning message.		MIU
Warranty	In Employee Hours Entry-Quick Entry, the Customize button could not be used when the <i>Employee Pay Rate</i> override had been turned off in User-Based Security.	NA	2017.1 MIU
Warranty	In Hours Entry, uploaded retro pay could be deleted by an employee, even if the employee did not have access to use the code.	NA	2017.1 MIU

Payroll Processing

Payroll Processing			
Type	Description	Case Number	Fix Version
Federal/State Compliance	FLSA-eligible earnings may be set up to exclude hours.	NA	2017.1 MIU
Warranty	The payroll calculation will use the correct calculation method from the deduction/benefit code after it has been changed.	5524060, 5526978, 5541349	2017.1 MIU
Warranty	Other percent type hours codes now allow four-decimal entries in the <i>Default Percent</i> field.	5528583	2017.1 MIU
Warranty	General ledger accounts were not split correctly when employees did not share the same distributions for the same deduction and vendor in HR disbursements and AP disbursements.	5530625	2017.1 MIU
Warranty	Time entry would not save unless an available shift code was selected from the drop box.	5546594	2017.1 MIU
Warranty	FLSA codes that are no longer active will not display as options when FLSA is assigned to the employee jobs.	5548770	2017.1 MIU
Warranty	The HSA employee deduction did not stop at the employee override limit.	5692469	2017.1 MIU
Warranty	The Payroll Hours Register displayed an error that an employee did not have a job.	5717353	2017.1 MIU

Payroll Processing			
Type	Description	Case Number	Fix Version
Warranty	The general ledger account did not populate on deduction items in HR Disbursements.	5786407	2017.1 MIU
Warranty	The accrual calculation generated an error when a plan that earns by hours worked was run.	5965710, 5979314, 5973467	2017.1 MIU
Warranty	Payroll calculations will look at the work day, not the period end date, to determine the number of days in the calendar year when using annual grades.	5977631	2017.1 MIU
Warranty	The number of pays per year may be overridden in the imputed income calculation. More .	6069964	2017.1 MIU
Warranty	Flat percent deduction and benefit codes will not be allowed to calculate based on taxable only hours codes.	6098272	2017.1 MIU
Warranty	Flat amount one-time overrides on a percentage-based deduction code will produce a correct GL distribution on the Journal Register.	6098272, 6135367	2017.1 MIU
Warranty	The pay check stub will not duplicate records in the withholdings and deductions section.	6107567, 6153894	2017.1 MIU
Warranty	Percent-based deductions and benefits will be calculated based on Tax Only hours codes.	6325291, 6338513, 6343168	2017.1 MIU
Warranty	Payroll calculation employee rates were not including special assignments with the shift differential.	NA	2017.1 MIU
Warranty	The Payroll Hours Register did not page break correctly.	NA	2017.1 MIU
Warranty	Changing an hours code from being set up with a debit account to being set up with a full debit general ledger account caused an error when payroll was validated.	NA	2017.1 MIU
Warranty	The performance of the Create Payment Register process has been improved.	NA	2017.1 MIU
Warranty	When a pay batch is uninitialized, retro pay	NA	2017.1

Payroll Processing			
Type	Description	Case Number	Fix Version
	hours loaded to the pay batch will become available to be uploaded to another pay batch.		MIU
Defect	The payroll calculation has been updated to calculate a benefit as a percent of a deduction.	5550023	2017.1 MIU
Defect	A garnishment record cannot be saved if it is missing a case number or an amount/percent.	NA	2017.1 MIU

Personnel Actions

Personnel Actions			
Type	Description	Case Number	Fix Version
Warranty	Personnel Action forms printed <i>mm/dd/yyyy</i> instead of the UDF date value.	5523104, 5546601	2017.1 MIU
Warranty	The employee full name tag in email notifications will display the employee name on a new hire personnel action code.	5546332	2017.1 MIU
Warranty	Department and benefit group will display on the header data of a New Hire Personnel Action form when printed.	5546335	2017.1 MIU
Warranty	Users have the ability to enter a personnel action on an employee with an active contract.	5759391, 5921416	2017.1 MIU
Warranty	A new event will not do a conversion on SecurityRoleid when it populates the PAcodedetailsecurityrole table.	5773060	2017.1 MIU
Warranty	Personnel actions that did not allow editing after approval now may be edited if they have been returned to the submitter.	5796022, 5818130	2017.1 MIU
Warranty	An approved personnel action could not be edited, even when the code allowed for the editing of approved actions.	6010486	2017.1 MIU
Warranty	The Personnel Actions Demographics section returned the following error: "Line #159 (): 'Is 1095CPaperless' is undefined."	NA	2017.1 MIU

Personnel Actions			
Type	Description	Case Number	Fix Version
Warranty	The new rate for employees who had a grade without steps did not display correctly on the Personnel Action Form.	NA	2017.1 MIU

Position Budgeting

Position Budgeting			
Type	Description	Case Number	Fix Version
Warranty	Budget Year Maintenance will allow for the calendar to populate a date.	5523001, 5546647	2017.1 MIU
Warranty	The percent annual will use the number of check dates in the calculation instead of the number of pay batches in Position Budgeting.	5547030	2017.1 MIU
Warranty	The following Position Budgeting error was received: "Cannot Insert the value Null."	5561948	2017.1 MIU
Warranty	The Position Budgeting calculation has been enhanced to include when the schedule has only the first day of pay on it.	5581885	2017.1 MIU
Warranty	The following Position Budgeting error message was received during a position calculation: "Cannot insert duplicate key in object 'dbo.PBPayrollEarnings' with unique index..."	5675456	2017.1 MIU
Warranty	In Position Budgeting, selecting to Add All Budgeted Positions brings in the currently listed vacant positions schedule again.	NA	2017.1 MIU
Defect	The new Percent of Deduction benefit calculation method has been added to the position budget calculation. More .	5550023	2017.1 MIU
Defect	The percent of annual calculation has been updated.	NA	2017.1 MIU

Reports

Reports			
Type	Description	Case Number	Fix Version
Product Improvement	An Employee Setup Error Report has been added to the Employee Reports menu. More .	NA	2018.1
Product Improvement	Summary-Employee-Excel and Detail-Employee-Excel options have been added to the Hours Analysis Report. More .	2237661	2017.1 MIU
Product Improvement	The Deduction Register and Benefit Register have been enhanced to include separate check codes. More .	5526856	2017.1 MIU
Product Improvement	W-2 Paperless and 1095-C Paperless are hidden on the Employee Information Report if the user is not licensed to eSuite.	NA	2017.1 MIU
Warranty	The Payroll Validation Setup Error Report included errors for employees who were out of position.	2217207	2017.1 MIU
Warranty	The performance of the Position Audit Report has been improved.	5524310, 5537279	2017.1 MIU
Warranty	The employee number was wrapping across two lines.	5525230	2017.1 MIU
Warranty	The Deduction Register <i>Amount to Date</i> showed double the current deduction amount when separate checks were used.	5526856, 5531832	2017.1 MIU
Warranty	The Employee Pay Rate Report was not using the <i>Apply Shift Amount to Certification</i> flag in Company HR Settings.	5682168	2017.1 MIU
Warranty	The EEO-4 Report was showing employees twice, once as FT and once as other than FT.	5687201, 5770442	2017.1 MIU
Warranty	An error occurred when the Payroll Hours Register was generated.	5690754, 5696239	2017.1 MIU
Warranty	The EEO-4 Part Time section was showing the categories multiple times. The title also was missing, and totals were not always showing.	5737963, 5753087	2017.1 MIU
Warranty	Certifications that expire are not displaying on the Employee Pay Rate Report.	5766587	2017.1 MIU

Reports			
Type	Description	Case Number	Fix Version
Warranty	The Benefit Register and Deduction Register from the Pay Day History menu will display voided checks at the time the report is run. The totals will reflect the actual totals at the time the pay batch was posted.	5798184	2017.1 MIU
Warranty	The Hours Analysis Report will now summarize by benefit group when <i>Select By</i> is Benefit Group .	5811829	2017.1 MIU
Warranty	Employee status has been added to the Employee Position Report to let the user view positions that have been filled by inactive employees. More .	5845566	2017.1 MIU
Warranty	The Payroll Hours Register will display the base rate and effective rate.	5861124	2017.1 MIU
Warranty	The Employee Pay Rate Report was showing the primary job rate on all jobs. The ability to run the report for one employee has been added. More .	5878904, 59630575	2017.1 MIU
Warranty	Pay rates will display on the Payroll Hours Register only when <i>Include Standard Pay Rate</i> is flagged.	5983894, 5993542, 6020152	2017.1 MIU
Warranty	The Hours Analysis Report type Detail-Employee-Hours Codes did not show Work Date, Hours Code and Week Day.	6059014	2017.1 MIU
Warranty	The Benefit Register no longer prints with blank pages.	6073915, 6101087	2017.1 MIU
Warranty	The Benefit History Report follows Process Manager rights for departmental inquiry.	6179942	2017.1 MIU
Warranty	The Payroll Hours Register gross, pay rate and shift amounts were incorrect.	NA	2017.1 MIU
Warranty	On the Employee Information Report, <i>Certification Pay Rate</i> does not include all other rates when <i>Apply Shift Amount to Certification</i> is applied.	NA	2017.1 MIU

Reports			
Type	Description	Case Number	Fix Version
Warranty	When the Position Audit Report was sent to myReports, the distribution information overlapped into two pages.	NA	2017.1 MIU
Warranty	The Shift Time and Attendance Report now includes the hours code used next to the hours listed in the <i>ABS Hours</i> column.	NA	2017.1 MIU
Warranty	The performance of the Position Audit Report has been improved.	NA	2017.1 MIU
Defect	The standard and initial measurement period reports were not saving changes made to existing saved reports.	NA	2017.1 MIU
Defect	A saved Employment Status Report could not be run in 2017.1, even if it was created in 2017.1.	NA	2017.1 MIU
Defect	The EEO-4 (Form 164) Report was reporting secondary jobs, even if the EEO fields were blank.	NA	2017.1 MIU
Defect	The EEO Report web help needed to be updated.	NA	2017.1 MIU
Defect	The EEO-4 Error Report failed if <i>Function</i> was blank, although the field was not required.	NA	2017.1 MIU
Defect	In the EEO report, if the secondary job had an EEO setup different from that of the primary job, the salaries combined and showed multiple times on the report.	NA	2017.1 MIU
Defect	TylerForms <i>Employee Benefit Plan Option ID</i> has been added as Column 8.	NA	2017.1 MIU
Defect	The EEO4 from 164 report cannot be overridden by a custom report.	NA	2017.1 MIU

Roster Cards

Roster Cards			
Type	Description	Case Number	Fix Version
Warranty	A syntax error occurred during the Roster Cer-	5523494	2017.1

Roster Cards			
Type	Description	Case Number	Fix Version
	tification batch process.		MIU
Warranty	The Roster Card Report wrapped the eighth and ninth position on the position number when sent to myReports.	5546539	2017.MIU
Warranty	A new business rule requires that a non-county roster employee position start date must be at least the roster position start date.	5546922	2017.1 MIU
Warranty	» The Roster Card Position non-county head count was incorrect when multiple events occurred on the same day. » The <i>Employee</i> column on the Roster Position List is showing "Multiple" when there are multiple events on a roster employee position.	5549248	2017.1 MIU
Warranty	The Roster Card Employee Position returned an error: "Property ArtificialPrimaryKey has no setter when deleting."	5584282	2017.1 MIU
Warranty	The Roster Card Report will display the current employee name after a name change.	5764361	2017.1 MIU
Warranty	Roster agency will display as the agency the budget position was tied to as of the <i>Position Effective Date</i> .	5805365	2017.1 MIU
Warranty	The <i>Roster Class Specification</i> will not expand.	5824615	2017.1 MIU
Warranty	Comments from the Roster Card section on the Job tab will be moved to the Roster Employee List. If comment do not exist there, the comments from the Job Detail section on the job will be used.	5939942	2017.1 MIU
Warranty	The roster position rate was incorrect and rounded differently for a county position.	NA	2017.1 MIU
Warranty	The Roster Employee List now shows all county employees, even when their most recent job events do not have job event reasons or are not civil service actions.	NA	2017.1 MIU

State Requirements

State Requirements			
Type	Description	Case Number	Fix Version
Product Improvement	System Settings Maintenance has been added to Arizona PSPRS. More .	5529403, 5545750, 5545780	2017.1 MIU
Product Improvement	The North Carolina Annual Withholding Reconciliation, transmittal file, and PDF reports have been created. More .	5547466, 5547469	2017.1 MIU
Federal/State Compliance	Nevada PERS provides the ability to override the status code from earnings code for an employee, view and edit PERS pay period information and print and create a transmittal for employers reporting multiple agencies. More .	5523298	2017.1 MIU
Federal/State Compliance	The Arizona PSPRS has been updated to support the new layout. More .	5529403, 5545750, 5545780	2017.1 MIU
Federal/State Compliance	Users are now able to run the Virginia Unemployment Report using SUTA tax.	5530208	2017.1 MIU
Federal/State Compliance	The Kentucky retirement reporting ER number in field 5-9 of the header record is left justified and right filled with spaces.	5535657	2017.1 MIU
Federal/State Compliance	Contribution details for Wisconsin retirement reporting are identified by each employee record.	5544890, 5546929	2017.1 MIU
Federal/State Compliance	The Alabama RSA Report has been added to support the new transmittal file requirements. More .	5548979	2017.1 MIU
Federal/State Compliance	The Mississippi Quarterly Wage Report and transmittal file have been created. More .	5826552	2017.1 MIU
Federal/State Compliance	Users have the ability to create separate PSPRS reports based on plan type.	5967355	2017.1 MIU
Federal/State Compliance	Additional Earnings records for the ILMRF report will have subject wages populated.	6114127	2017.1 MIU
Federal/State Compliance	The South Carolina Quarterly Contribution and Wage Report layout has been updated to meet	6168098	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
	the changes made by the state.		
<i>Federal/State Compliance</i>	RE record position 8-16 will use the <i>Employer Number</i> that is supplied in the UI for the South Carolina Quarterly Wage Report.	6168098	2017.1 MIU
<i>Federal/State Compliance</i>	Contribution codes can be assigned to benefit codes for Alaska PERS and SBS retirement on the Benefit Contributions tabs.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Alaska Retirement List page has been created to identify all employees who have AK PERS/SBS contributions and will be included in AK retirement reporting.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Menu items allow for the updating and processing of Alaska retirement data.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Contribution tabs have been created to display Alaska retirement reporting data.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Wages tab details the hours type, hours and amount for each Wisconsin retirement reporting record. These entries may be edited.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Contribution codes can be assigned to deduction codes for Alaska PERS and SBS retirement on the Deduction Contributions tabs.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Data may be included or excluded manually from the employment and events tab on the Alaska PERS personnel data file.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	A data grid has been added to the Contributions tab for reviewing employee and employer contribution details.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Member, Employment and Event tabs have been created to display Alaska retirement reporting data.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	For Alaska PERS, any current job event moved to the selected job event box will be used to trigger an employment record in the personnel file when the value is supplied during a create event on the Jobs tab in Workforce.	NA	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
<i>Federal/State Compliance</i>	Errors were displayed when the Nevada PERS was run.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Arkansas PERS transmittal file changes are submitted each payroll.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	California Government Compensation Medicare Gross needed to be adjusted to exclude certain hours codes. More .	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Service tab will hold data pertaining to the service hours associated with the pay period being reported.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	W-2 Ohio RITA added four new municipalities that needed to be added to the W-2 transmittal file.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Future work dates are included in the current pay period for Alaska PERS.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Indiana New Hire Report has been added to the Indiana State Requirements menu. More .	NA	2017.1 MIU
<i>Federal/State Compliance</i>	In Kentucky Retirement Maintenance, the <i>Default Employer Code</i> has been changed to a drop box attached to validation set 545.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Kentucky Retirement List detail lets users change and save the employer code value.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Data fields have been added to the Member Data tab that will allow users to edit and flag data to be included in the personnel file.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Selected records can be deleted from the Alaska Retirement list.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Data fields have been added to the Employment Data tab, allowing users to edit and flag data to be included in the personnel file.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The event type will allow users to report the significant events and dates related to an employee's employment status for Alaska retirement purposes.	NA	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
<i>Federal/State Compliance</i>	The Michigan New Hire Report provides a way to include employees not paid in 60 days, then paid as rehires. More .	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Certain employment statuses remove the employee from a paid status. When it happens, a date of last pay must be provided. This flag identifies any status where a date of last pay is required and notifies the user when the Wisconsin Retirement System transmittal is generated.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Employees may be selected and deleted from the Wisconsin retirement reports.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Users of Wisconsin retirement reporting have the ability to create a record manually if they want to update the employment status or allocate wages not processed through payroll.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	For the Wisconsin Retirement System print process, select the information and the format for reviewing.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The transmittal file is used to upload Wisconsin retirement data directly to the ETF website.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Contributions to the Wisconsin Retirement System are detailed according to contribution type. These fields are fully editable.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Hours and wages are displayed here from the Wisconsin retirement reporting create process. They are fully editable, and the adjusted hours column is visible if the employee benefit group has been selected for adjustment in system settings.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	For Wisconsin Retirement System reporting, the Payroll Data tab identifies the number of records that are being reported for the employee. It contains additional detail hidden within the <i>Check Date</i> hyperlink.	NA	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
<i>Federal/State Compliance</i>	Wisconsin Retirement System employment data defines the employment status, work status and job category for each employee.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Wisconsin Retirement System create process pulls the data as of the period end date of the record and populates the employee personal information.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Wisconsin Retirement System Employment tab contains data that is editable with regard to any information about the employee job category, work status, employment status and the dates surrounding any changes to these fields.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Non-standard hours will be added to the total number of hours reported on the Wisconsin Retirement System transmittal file.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	For Wisconsin retirement reporting, the contract change flag indicates that the employment status the employee is moving to is considered a new employment record. New employment records are generated with new employees, change in job category, and work status changes.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Add a member to the Wisconsin Retirement List by selecting the New button.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Details of contributions for the Wisconsin Retirement System are identified by each employee record.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Wisconsin Retirement System error report will identify any missing or invalid data that has been generated on the transmittal file.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Review the summary or detail data created for Wisconsin retirement reporting.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Service Type codes can be assigned to hours codes for Alaska PERS and SBS retirement wage	NA	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
	selection on the Service Types tab.		
<i>Federal/State Compliance</i>	Alaska PERS service hours will reflect the type and amount of hours worked for the payroll.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Employment status event will be used to trigger a reportable event for Alaska retirement reporting. Map existing employment status events to the corresponding Alaska-defined employment events for reporting purposes.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Leave balances for selected hours categories can be reported to Alaska PERS through the use of the Leave Balance tab.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Data that needs to be reported on the payroll transmittal file for Alaska may be added and updated manually within the Contributions tab.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Alaska PERS Service tab allows for the reporting of hours worked and hours submitted while on workers' compensation.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Alaska PERS Leave Balance tab displays and allows editing of the cumulative total of selected leave hours available for an employee.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Employees can be added to the Alaska Retirement List if they were removed or paid from a different manual pay batch.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The date range will identify any check dates in the time frame and will use this pay batch(es) to generate Wisconsin Retirement System data.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	When a benefit group has not been selected for <i>Adjust Hours</i> and an hours code flagged as "adjust hours" is paid, adjustment calculations are not made for these hours, and they are reported in the <i>Posted</i> column on the UI. These hours also translate to the Wisconsin Retirement System transmittal file as such.	NA	2017.1 MIU
<i>Warranty</i>	The California Quarterly Report can be run for different wage codes and will use the cor-	5529050, 5534345,	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
	responding wage codes on the transmittal file.	5538316	
Warranty	The Arkansas PERS transmittal file has been updated to use the correct format.	5543337	2017.1 MIU
Warranty	Wisconsin System Settings Maintenance lets users define the company specific data that needs to be reported on the Wisconsin Retirement System transmittal file.	5544890, 5546929	2017.1 MIU
Warranty	» Wisconsin System Settings Maintenance lets users define the reporting criteria for the Wisconsin retirement transmittal data. » A record for an employee may be removed. More.	5544890, 5546929	2017.1 MIU
Warranty	Calendar and fiscal year hours will be adjusted according to Wisconsin retirement reporting requirements.	5546932	2017.1 MIU
Warranty	A new field to create the Michigan ORS lets users pull contract data based on a different date range instead of the check date range.	5579376	2017.1 MIU
Warranty	The UDF at the hours code level is flagged to remove the hours from being reported to the Wisconsin Retirement System.	5596733	2017.1 MIU
Warranty	A general error message was received when the Pennsylvania Create Unemployment Tax Data was run for the second quarter of 2017.	5601125	2017.1 MIU
Warranty	» Position number 296-302 on the old Wisconsin Retirement System (WRS) transmittal file is filled with zeros. » Populate a value of PT at the deduction code UDF and these contributions will be reported under the <i>Pre-Tax Contributions</i> for WRS on the transmittal file. » The first and last name on the old WRS transmittal file are left justified.	5673727	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
	» The WRS PDF report will display the new field for pre-tax contributions. » Calendar and fiscal year hours are now reported on the transmittal file out to two decimal places.		
Warranty	The Washington DRS Report only pulls in demographic changes (create an M record) when an event has been created on the employee name or address with an effective date that is equal to or between the create data process dates.	5684953	2017.1 MIU
Warranty	» List of employees who have a record for Mississippi retirement reporting. » Create MS data using from and through dates. Reporting date is used to supply month and year of the report. » MS Retirement list, edit, add and delete employee records. » Retirement system settings for Mississippi. » Mississippi PERS Transmittal file. » Mississippi PERS data. » Maximum reportable wages for the year is specified with this field. Also allows for any wages over this limit to be overridden with a specific wage code.	5740703	2017.1 MIU
Warranty	Manual checks are added to the Wisconsin Retirement System Report correctly without duplicate records and doubled wages.	5759165	2017.1 MIU
Warranty	The Alabama RSA-1 contributions are no longer prorated between wage types on the new RSA report.	5761482	2017.1 MIU
Warranty	Other amounts that are subject to Wisconsin retirement reporting needed to be converted	5779032	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
	into reportable hours. Other amount wages are divided by the employee hourly rate, and the calculated hours are added as reportable on the Wisconsin Retirement System Report.		
Warranty	The Oregon tax change has been removed from the Oregon state tax calculation.	5792318	2017.1 MIU
Warranty	Employees who do not have a state tax will display as FL in field 92 of the Florida Quarterly Wage transmittal.	5836502, 5798495, 5852492, 5896839	2017.1 MIU
Warranty	In Iowa PERS, an error occurred in the create data process when duplicate social security numbers existed. » Use the record with the greatest <i>First Date of Employment</i> as the permanent record. » Use all the data related to this record for all fields except the <i>Period Wages</i> field. » Remove the remaining (or other) records from the transmittal and sum the period wages. » Override the period wages on the permanent record to be a sum of all amounts reported in the <i>Period Wages</i> field for all records that contain the same SSN and occupation code.	5845680	2017.1 MIU
Warranty	The CalPERS create data was only removing up to 500 of the previously created records before it created the new data. Now it will remove all records previously created when new data is created.	5881825	2017.1 MIU
Warranty	The Michigan REP Report salary amount was not showing in the transmittal file.	5898212	2017.1 MIU
Warranty	The KRS transmittal file no longer has duplicated records.	5975844	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
Warranty	The Kentucky Quarterly Tax and Wage Transmittal S record needs excess wages.	5992931, 6196959	2017.1 MIU
Warranty	Employees with zero wages for the quarter may be removed from the Indiana Quarterly Tax and Wage Report.	6013227	2017.1 MIU
Warranty	The employer account number will right justify and zero fill on the Iowa Retirement transmittal file.	6057189, 6037460	2017.1 MIU
Warranty	The <i>Year</i> and <i>Month</i> were not populating on the footer record in the Iowa Retirement transmittal.	6062928	2017.1 MIU
Warranty	The Indiana 100R was using an extra day in the date range.	NA	2017.1 MIU
Warranty	RSC transaction types will no longer display a pay rate and pay rate type in accordance with the new CalPERS update.	NA	2017.1 MIU
Warranty	For New York PERA, tier 5 and 6 employees who do not contribute will now have their salary reported.	NA	2017.1 MIU
Warranty	The ability to report wages and not hours is available in the new 2018 Wisconsin retirement reporting. More .	NA	2017.1 MIU
Warranty	The retirement list displays all the employees who will have a record created for Wisconsin retirement reporting.	NA	2017.1 MIU
Warranty	The Wisconsin Retirement System (WRS) requires the employer to report the day an employee becomes effective/eligible to participate in the retirement system. A new field allows the employer to define the date used for the WRS coverage effective date.	NA	2017.1 MIU
Warranty	Contribution types may be mapped to deductions and benefits for Wisconsin retirement reporting.	NA	2017.1 MIU
Warranty	Employee personal data used for Wisconsin retirement reporting is displayed.	NA	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
Warranty	Select any benefit group that needs to have hours adjusted to meet the "full time hours" that need to be reported to the Wisconsin Retirement System.	NA	2017.1 MIU
Warranty	Indicate which hours codes are subject to Wisconsin retirement wage reporting and the wage category they are classified under. The check box allows users to select the hours that are subject to the Wisconsin retirement hours adjustment for full-time employees who work fewer than 40 hours per week.	NA	2017.1 MIU
Warranty	Employer reporting identification and billing location identification have been added to Wisconsin retirement reporting.	NA	2017.1 MIU
Warranty	Select to create Payroll Only, Personnel Only or a combination of Payroll and Personnel data for Alaska PERS.	NA	2017.1 MIU
Warranty	Employment events may be mapped to the required employment events that need to be reported to the Wisconsin Retirement System.	NA	2017.1 MIU
Warranty	An Alaska PERS PDF is generated for payroll contributions. The report contains detailed information and summarized totals.	NA	2017.1 MIU
Warranty	A CVS transmittal file is generated for Alaska personnel and payroll data.	NA	2017.1 MIU
Warranty	An Alaska PERS PDF is generated for personnel information. Member, event and employment data are included.	NA	2017.1 MIU
Warranty	The Alaska PERS event data will display all qualifying events that occurred within the last 12 months and be included on the personnel data file transmittal.	NA	2017.1 MIU
Warranty	The Alaska PERS Employment tab will identify the qualifying employment or job changes/updates that have occurred within the last 12	NA	2017.1 MIU

State Requirements			
Type	Description	Case Number	Fix Version
	months and report them on the personnel data transmittal file.		
Warranty	The Member Data tab displays personal information that will be used to create the Alaska PERS personnel transmittal file.	NA	2017.1 MIU
Warranty	The Alaska PERS create function allows users to create a personnel file only, a payroll file only or a combination of the personnel and payroll files.	NA	2017.1 MIU
Warranty	The Alaska PERS Contribution tab displays the type of contribution for a specific payroll and the amount contributed. These are the exact amounts that will be reported on the payroll transmittal file.	NA	2017.1 MIU
Warranty	Adjustments are excluded from the Wisconsin retirement reporting create function.	NA	2017.1 MIU
Warranty	A new Wisconsin retirement reporting field lets the user identify the Report Gen Type according to pay group.	NA	2017.1 MIU
	The New York PERA Report was not including gross that came from manual checks for Tier 1-4 employees. Note: Additional setup will be required. Validation set 10 (Pay Groups) will need an alternate value set up on manual checks. <i>Usage Type: NWS Pay Group Value: Biweekly, Weekly, Monthly or Yearly.</i>	NA	2017.1 MIU
Defect	The Indiana Retirement List page did not allow 50 characters in the last name.	NA	2017.1 MIU
Defect	The Alaska Retirement List search results were missing the employee numbers.	NA	2017.1 MIU
Defect	The Nevada PERS Workforce UDF names were too long. They now may be <i>NV PERS Employee Group</i> and <i>NV PERS Part Time</i> .	NA	2017.1 MIU
Defect	The Arizona PSPRS System Settings Maintenance security component was missing.	NA	2017.1 MIU
Defect	A CALPERS submission was rejected by the State	NA	2017.1

State Requirements			
Type	Description	Case Number	Fix Version
	of California.		MIU
<i>Defect</i>	The South Carolina Quarterly Contribution transmittal file was showing incorrect addresses and totals.	NA	2017.1 MIU
<i>Defect</i>	The Arizona Public Safety PRS Report was missing the header record on the CSV transmittal layout.	NA	2017.1 MIU

Time Off Requests

Time Off Requests			
Type	Description	Case Number	Fix Version
<i>Warranty</i>	The user name upon login is no longer case sensitive when a time off request is submitted.	6071635	2017.1 MIU
<i>Defect</i>	The Time Off Request page loading spinner did not disappear when accrual hours were not set up for the employee accrual plan.	NA	2017.1 MIU

Workforce Administration

Workforce Administration			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	<i>Paperless W-2 and Paperless 1095-C</i> check boxes have been added to the Demographics section of the employee's Workforce Administration Personal tab. The selections here update the paperless selections in eSuite. More .	NA	2017.1 MIU
<i>Product Improvement</i>	<i>Paperless W-2 and Paperless 1095-C</i> are hidden on the Personal tab if the user is not licensed to eSuite.	NA	2017.1 MIU
<i>Product Improvement</i>	In the Benefit Plan Detail section for HSA plans, the Override column of the Plan Cost grid has been renamed Employee Contribution. The amount in this column refers to the employee	NA	2017.1 MIU

Workforce Administration			
Type	Description	Case Number	Fix Version
	contribution only.		
Warranty	Workforce garnishment was saving without the case number and amount.	5621114	2017.1 MIU
Warranty	Users can create future events for future-dated new employees without error.	5680176	2017.1 MIU
Warranty	The schedule returned and error when the hours code had an event date after the schedule event.	5692056, 5710263	2017.1 MIU
Warranty	In Workforce, a job future event could not be deleted when an eTimesheet had currently entered time.	5934666, 5971679, 5988797, 5984373	2017.1 MIU
Warranty	Taxes for Indiana did not show the <i>Dependent Exemption</i> field when there was a future-dated tax event in maintenance.	NA	2017.1 MIU
Warranty	A new direct deposit did not default as active, showed amount instead of percent, and the <i>Amount</i> field was disabled.	NA	2017.1 MIU
Warranty	The WFA <i>Certification Pay Rate</i> did not include all other rates when <i>Apply Shift Amount to Certification</i> was applied.	NA	2017.1 MIU
Defect	When the user navigated to another employee, the cursor was missing from the New Deduction or New Benefit pop-up.	NA	2017.1 MIU
Defect	The Workforce search did not display new employees with a pending status.	NA	2017.1 MIU
Defect	Creating events on benefit plans will no longer generate the "Index is out of range" error.	NA	2017.1 MIU
Defect	Despite view-only rights for benefit plans, edit rights to benefit credits remained available.	NA	2017.1 MIU
Defect	The Workforce longevity adjust rate is not correct.	NA	2017.1 MIU

Year-End Processing

Year-End Processing			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	A drop-down field has been added to the W-2 Employee List page so the search may include paperless, not paperless or both.	NA	2017.1 MIU
<i>Product Improvement</i>	In 1095-C Employee, a column called <i>Paperless</i> has been added to the grid.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	In eEmployee, Print 1095-C Forms displayed "helppppp" after the <i>Tax Year</i> was switched.	5523364	2017.1 MIU
<i>Federal/State Compliance</i>	The W-2 create transmittal process has been updated for 2017.	5529586	2017.1 MIU
<i>Federal/State Compliance</i>	W-2 Processing required an upload to the city of Flint.	5544430	2017.1 MIU
<i>Federal/State Compliance</i>	The W-2 create process has been updated for 2017.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	W-2 forms for the U.S. have been updated for 2017.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	W-2 forms for Guam have been updated for 2017.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	For W-2 Setup, code FF has been added to Box 12. More .	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Create W-2 process for 2017 has been updated to include code FF .	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Box 12 code FF has been added to the W-2 Register Detail and W-2 Adjustment.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	Print W-2 Z-fold form for employee.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	A <i>Box 9 Verification Code</i> field has been added to W-2 Employee. More .	NA	2017.1 MIU
<i>Federal/State Compliance</i>	1095-C transmittal files were tested with the IRS.	NA	2017.1 MIU
<i>Federal/State Compliance</i>	The Missouri W-2 transmittal, custom RS and RV records have been updated.	NA	2017.1 MIU
<i>Warranty</i>	An error occurred in the Create W-2 process when the state was MI with no local tax.	5949974	2017.1 MIU

Year-End Processing			
Type	Description	Case Number	Fix Version
Warranty	The W-2 transmittal for Illinois was rounding amounts on the RV record.	5986430	2017.1 MIU
Warranty	New 1095-C employees will display in the 1095-C list.	5999344	2017.1 MIU
Warranty	The W-2 for Indiana needed to be blank in RS 193-203.	6031099	2017.1 MIU
Warranty	The W-2 transmittal file for Iowa was rejected because the RV record is to have only the count of the IA RS records.	NA	2017.1 MIU
Warranty	W-2 Ohio Transmittal Rita changes.	NA	2017.1 MIU
Defect	In the Create W-2 process, a more instructive error message is displayed if the Type of Tax is not selected for all localities having the same code.	NA	2017.1 MIU
Defect	Utilities were written to update web.config files at year end.	NA	2017.1 MIU
Defect	Print 1095-C Forms did not print for those added to the 1095-C Employee List.	NA	2017.1 MIU
Defect	The Flint W-2 transmittal only identified a local code of FL and not FLINT to be included on the transmittal. More .	NA	2017.1 MIU
Defect	The Missouri W-2 transmittal was reporting federal tax withholding in the local tax withholding fields.	NA	2017.1 MIU
Defect	Corrections were made to the 1095-C Validation Error Report.	NA	2017.1 MIU

Utility Management

The tables below contain descriptions of the Utility Management items that are part of the 2018.1 release of new world ERP.

To get software enhancements to our customers at the earliest possible availability, we provide new enhancements via MIU patches that can be downloaded and installed between releases. These enhancements are essentially "next release" enhancements delivered early. They are identified in the release notes with the previous release number and the "MIU" identifier (e.g., 2017.1 MIU).

For details on new features and enhancements to existing features, see "[What's New in Utility Management](#)."

Account

Account			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Enhancements have been made to improve the way payment plans apply payments against ongoing charges and plan installments. For more information, see Payment Plan Enhancements in 2018.1 .	5528795, 5527340, 5527333	2017.1 MIU
Warranty	Some utilities may have a small number of accounts for which the overall balance is known and correctly displayed on most screens, while in other specific screens there exists a small discrepancy between the total balance and the balance displayed at the charge category/line-item detail level. This sometimes occurs due to software defects that have since been resolved. Enhancements have been made to correct this issue. For more information, see	NA	2017.1 MIU

Account			
Type	Description	Case Number(s)	Fix Version(s)
	<u>Correcting Bad Transaction Data</u>		
Warranty	Fields related to the device Location were not being displayed completely.	524184	2017.1 MIU
Warranty	In some instances, new payment plans could not be created as a programming error was issued.	5547031, 5529827	2017.1 MIU
Warranty	If an account with only one meter was shared by water and sewer services, the transaction grid would show an icon instead of billed consumption. This has been corrected to look at the number of meters instead of the number of services.	5543544	2017.1 MIU
Warranty	When adding or maintaining a meter either directly or through work orders, the user can enter meter reader notes. There is a limit on the length of the notes, but no feedback was given to the user on that limit, the extra text was truncated without the users knowledge. Now the user receives feedback if they enter text that is too long.	5547245, 5545899	2017.1 MIU
Warranty	There are two types of account messages, cus-	5544064, 5546446, 5530642, 5546294	2017.1 MIU

Account			
Type	Description	Case Number(s)	Fix Version(s)
	tomor and user. User messages are manually added and manually removed. For accounts with multiple user messages, when one was end-dated, they were all end-dated.		
<i>Warranty</i>	Single installment payment plans were not working correctly. These represent extensions not payment plans. The customer is not agreeing to catch up to their current balance, they are agreeing only to pay a certain portion of their past due to avoid cut off. Single installments have been corrected to properly support this concept.	5767201	2017.1 MIU
<i>Warranty</i>	When creating single installment payment plans, the single installment was created with the plan start date rather than the due date entered by the user.	5767201	2017.1 MIU
<i>Warranty</i>	Meter Reader notes can now include numeric values.	5776471	2017.1 MIU
<i>Warranty</i>	For inactive accounts, the Customer Service Transaction screen was incorrectly showing NA in the consumption column. This has been corrected.	5824319, 5893732, 5890751, 5886833, 5828619	2017.1 MIU
<i>Warranty</i>	In some instances, the	5977420, 5986895	2017.1 MIU

Account			
Type	Description	Case Number(s)	Fix Version(s)
	Transactions grid in Customer Service was displaying a consumption of NA even when the bill had consumption. This has been corrected.		
Warranty	The option in Customer Service Transactions to reverse a payment would crash on payments that were converted from a legacy system. The page no longer crashes. Instead, it issues an error message indicating that converted transactions cannot be reversed.	5995742	2017.1 MIU
Warranty	Enhancements have been made to give administrators the option of including or excluding billing adjustment information from the Consumption Trend Report (UM) and Consumption Analysis page (eSuite). For more information, see Consumption Reporting & Billing Adjustments .	5954331	2017.1 MIU
Warranty	The Consumption Trend Report was incorrectly including adjustments that are not bill related. It now only includes bill related adjustments.	5954331	2017.1 MIU
Warranty	NSF processing and credit card enrollment were fail-	5954189, 5955726, 5957028, 5962603,	2017.1 MIU

Account			
Type	Description	Case Number(s)	Fix Version(s)
	ing. This has been corrected.	5963562, 5964766, 5962317, 5970158, 5970968	
<i>Warranty</i>	The system can be configured to automatically create a Move Out when a Move In is created. In some rare instances, the Move Out account had historic Move Out bills from the conversion or a Move Out followed by a reinstate service. In these instances the automatic creation of a Move Out would fail. This has been corrected.	5528467, 5716432, 5921255	2017.1 MIU
<i>Warranty</i>	When a Move In was canceled, a subsequent Move In would require extra effort to assure the meters were accurately set to fuel any metered services. This fix is a data script to scrub old canceled move ins so the problem will not occur if fresh move ins are performed on the account.	6059669	2017.1 MIU
<i>Warranty</i>	Recurring credit cards using American Express cards showed as Discover card in the system. They charged out correctly against the correct card but showed incorrectly on the RCC enrollment page.	6018990	2017.1 MIU
<i>Warranty</i>	Accounts were missing	6059669	2017.1 MIU

Account			
Type	Description	Case Number(s)	Fix Version(s)
	meters on Move In. Data has been cleaned up.		

Adjustments

Adjustments			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	In some very rare instances, when adjustment amounts were spread to the charge categories, a penny rounding issue could occur and result in an account that reports two slightly different balances in the system.	NA	2017.1 MIU

Billing

Billing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Product Improvement</i>	The meter read history available on the bill export and printing can now include up to two years of history.	523478	2017.1 MIU
<i>Product Improvement</i>	The read history that can be included on the bill export and print now includes the billing date in addition to the meter read date. This can be more intuitive to the consumer as the billing date relates directly to the bills they received, whereas the meter read date may be significantly off from	525413	2017.1 MIU

Billing			
Type	Description	Case Number(s)	Fix Version(s)
	that date.		
<i>Product Improvement</i>	The bill export now includes the email address of the primary account holder.	5529308	2017.1 MIU
<i>Product Improvement</i>	The following fields were added to the AMR Export: Meter Set Date, the complete Billing Address, and separate Customer First and Last Name. To see these fields in your export, your custom export must be modified.	NA	2017.1 MIU
<i>Warranty</i>	In some situations, the Unbilled Accounts report that is produced by the calculation process would incorrectly list accounts that should be billed. This happened when non-metered units were changed and future-dated. This has been corrected.	5887135, 5701496, 5738551	2017.1 MIU
<i>Warranty</i>	Accounts that have no rates associated with non-metered services now correctly show on the unbilled accounts report.	523725	2017.1 MIU
<i>Warranty</i>	On utility bills, the city, state, and zip code were on multiple lines in the XML data. This only affects customers using Tyler Forms.	NA	2017.1 MIU

Billing			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	On refund checks, the nwERP XML data from UM and MB was returning the city, state, and zip code on multiple lines. This only affects customers using Tyler Froms.	NA	2017.1 MIU
Warranty	During the billing process, the Non-Billable Accounts report lists the accounts that are not configured correctly to bill. Previously, it was not including accounts that were not properly configured to bill non-metered services. It was changed to include those issues, but was producing false hits as well. These false hits were preventing some valid accounts from billing. This has been fixed.	5656948, 5656941	2017.1 MIU
Warranty	In some rare instances, posting exception bills would remove the non-metered units from random accounts in cycle bills. This has been corrected.	5849192, 5727617	2017.1 MIU
Warranty	The AMR export includes audit high and low reads. These are used by some AMR equipment to warn the reader if the read looks too large or too small. When the most recent read was an ini-	5547044	2017.1 MIU

Billing			
Type	Description	Case Number(s)	Fix Version(s)
	tialize/meter reset, these values were not set correctly and would not produce meaningful warnings. They are now correct.		
<i>Warranty</i>	A change was made to correct the high and low audit thresholds in the AMR export. In some instances that change caused the number of decimals on the audit to be incorrect. This has been corrected.	5830017	2017.1 MIU
<i>Warranty</i>	In some situations, the account address or meter test circle values were truncated in the exported data. This has been corrected.	5955355, 6062561, 6042963	2017.1 MIU

Delinquent Processing

Delinquent Processing			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	Delinquency processing has been enhanced to prevent simultaneous runs from different users.	5540106, 5533990, 5523274	2017.1 MIU
<i>Warranty</i>	Mailing addresses with commas or invalid zip-plus-4 values were breaking the delinquent statement print function. This has been corrected.	5538452	2017.1 MIU
<i>Warranty</i>	In certain very rare instances, the delinquent	5530262	2017.1 MIU

Delinquent Processing			
Type	Description	Case Number(s)	Fix Version(s)
	identify process would error out and would not identify any accounts.		
Warranty	If an NSF was performed on an account that was in an open bad debt batch, the bad debt batch would crash when you attempted to work with it.	5588732, 5528219, 5661626, 56969585	2017.1 MIU
Warranty	A device was not showing in device inventory.	524172	2017.1 MIU
Warranty	In certain very rare situations, running a delinquent event produced the error message "Failed to build statement history."	5527021, 5525288	2017.1 MIU
Warranty	The Bad Debt Report now properly honors the user's security settings.	5525356	2017.1 MIU
Warranty	The Current Balance column has been added to the Bad Debt Edit Listing.	NA	2017.1 MIU
Warranty	The Bad Debt Edit Listing and Post Listing were not fitting on one page.	6007127	2017.1 MIU
Warranty	When sent to myReports rather than being displayed in the pop-up, every other page of the Bad Debt Edit report was blank. This has been corrected.	6007127	2017.1 MIU

Device Inventory

Device Inventory			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	A device was not showing in device inventory.	524172	2017.1 MIU

Forms

Forms			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	In certain situations, some customers were receiving the error "Cannot insert the value NULL into column 'UTConsumptionHeaderID'". This error could occur on various forms.	5523518, 5542420, 5542719, 5529634, 5542678, 5547489, 5535136, 5528551, 5528521	2017.1 MIU
Warranty	When using the Echo form for exception bills, the bills were not printing in account number order. This has been corrected.	5527945	2017.1 MIU
Warranty	On utility bills, the customer mailing address was cut off when address lines 2/3 existed. Also, double ampersands appeared in the customer name.	NA	2017.1 MIU
Warranty	On UM refund checks, double ampersands displayed for Payee Name.	NA	2017.1 MIU
Warranty	If a field contained an ampersand (&), it would appear twice when pulled into Tyler Forms.	NA	2017.1 MIU

eSuite eUtilities

eSuite eUtilities			
Type	Description	Case Number(s)	Fix Version(s)
<i>Software Improvement</i>	Enhancements have been made to eSuite user authentication functionality. These enhancements give the user a more typical login experience, making it easier for them to log into eUtilities, create and save their sign-in credentials, and, should they ever forget them, recover their sign-in credentials. For more information, see eSuite Authentication .	NA	2017.1 MIU
<i>Warranty</i>	The eSuite landing page includes a balance at last billing value, and it associates a due date with that value. The value is now always the due date of the most recent bill. Previously, if a customer was in arrears, the due date was from the oldest outstanding bill.	5578729, 5530114, 5549756, 5548828, 5549734, 5527325	2017.1 MIU
<i>Warranty</i>	Enhancements have been made to give administrators the option of including or excluding billing adjustment information from the Consumption Trend Report (UM) and Consumption Analysis page (eSuite). For more information, see Consumption Reporting & Billing Adjustments .	5954331	2017.1 MIU

eSuite eUtilities			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	In some instances, the due date would display incorrectly in eSuite. It now displays correctly.	5930139, 5931559, 5971258	2017.1 MIU

Receipts

Receipts			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	A confusing error message displayed when posting an ACH batch and no new cycles existed.	5522920	2017.1 MIU
Warranty	In some rare instances, the Total line at the bottom of the ACH file produced for the bank or clearing house was off by a penny from the actual sum of the detail drafts. This has been corrected.	5923854	2017.1 MIU
Warranty	If a consumer makes multiple payments on the same day, the IVR payment history API now reports them in the correct order.	5772488	2017.1 MIU

Reporting

Reporting			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	In some instances, the Account Status Report incorrectly listed the state on the address column of the report.	5546953, 5523343, 5547603	2017.1 MIU
Warranty	If there was a history of a	5670652	2017.1 MIU

Reporting			
Type	Description	Case Number(s)	Fix Version(s)
	billing item type, i.e., the same billing item billed at different times over the life of the account, then whenever the line item was displayed in the Billing Item Charges Report, it would be duplicated. The issue has been fixed.		
Warranty	» The Consumption Trend Report was improved in regards to how adjustments are handled. The consumption trend report shows the relationship between consumption and bills. It should never show payment adjustments as those represent corrections to payments not bills. Additionally, it now shows billing adjustments based on a setting in the system settings. » The Consumption Trend Report and eUtilities Consumption History page were changed to only include	5954331	2017.1 MIU

Reporting			
Type	Description	Case Number(s)	Fix Version(s)
	billing adjustments to raise or lower the balance when the intent of those adjustments is clear. The adjustments need to point to a bill using the reference transaction, or have an activity date that matches the activity date of a bill. Note: Both items above should be installed to achieve the desired result.		

Revenue Collections

Revenue Collections			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	Clearing bad debt by taking payments in from Revenue Collections was not properly logging a transaction date in the bad debt ledger.	5646420	2017.1 MIU

Work Orders

Work Orders			
Type	Description	Case Number(s)	Fix Version(s)
Warranty	The work order result page and direct meter maintenance page no longer issue false errors on the length of the meter location entry.	5629005	2017.1 MIU

Work Orders			
Type	Description	Case Number(s)	Fix Version(s)
<i>Warranty</i>	The third party work order interface was not passing the primary customer name to the third party. This now works correctly.	NA	2017.1 MIU

System-Wide

The tables below contain descriptions of the system-wide items that are part of the 2018.1 release of new world ERP.

To get software enhancements to our customers at the earliest possible availability, we provide new enhancements via MIU patches that can be downloaded and installed between releases. These enhancements are essentially "next release" enhancements delivered early. They are identified in the release notes with the previous release number and the "MIU" identifier.

For details on new features and enhancements to existing features, see "[What's New System-Wide](#)."

Base-Other

Base-Other			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The New World ERP software has been revised and modernized to function with multiple web browsers and provide the user with a smooth processing experience. As part of this project, all grids have been updated to provide the same features, such as sorting, filtering, managing columns and saving configurations.	NA	2018.1
<i>Product Improvement</i>	The eSuite email process has been upgraded to support email templates. All emails, instead of being sent directly from eSuite, are sent through the Notification Service. More .	NA	2018.1
<i>Product</i>	A global search field has been added to all	NA	2018.1

Base-Other			
Type	Description	Case Number	Fix Version
<i>Improvement</i>	pages of the software. More .		
<i>Product Improvement</i>	The New World ERP home page has been updated with a more modern, intuitive layout that makes it easy to find, review and act on information. More .	NA	2018.1
<i>Product Improvement</i>	Security has been enhanced through the implementation of the Tyler-wide Tyler Identity (TID) product supporting single sign-on (SSO) across Tyler applications. A new sign-in screen reflects this enhancement. The sign-in is shared between Tyler Hub and New World ERP. After signing in once via Hub or ERP, you will not have to sign in again to access the other application. View new sign-in screen .	NA	2018.1
<i>Product Improvement</i>	The My New World icon now takes users to the New World ERP section of TylerTech.com.	5722845	2017.1 MIU
<i>Warranty</i>	Hovering on the my activities grid locked up the browser.	5680439	2017.1 MIU
<i>Warranty</i>	An IE memory leak has been resolved. Memory no longer in use is released.	5752796	2017.1 MIU

Base-Suite

Base-Suite			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	The Approval Manager has been redesigned to provide a smoother, more intuitive workflow in the creation and management of approval processes. More .	NA	2018
<i>Warranty</i>	The attempt to attach a link that contained a prefix other than <i>http</i> or <i>https</i> using the new document viewer changed the link to <i>http://</i> .	NA	2017.1 MIU

Community Development

Community Development			
Type	Description	Case Number	Fix Version
Warranty	Community Development Systems Settings has been updated to validate licensing correctly. The page failed if a customer was not licensed to Human Resources.	5526631	2017.1 MIU
Warranty	The pop-ups for the inspection worksheet, schedule and results reports and the active stop work report now have the Send to myReports button.	5689405	2017.1 MIU

eSuite

eSuite			
Type	Description	Case Number	Fix Version
Product Improvement	The Password Reset page provides a message to alert the user of an expired password.	NA	2017.1 MIU
Defect	The Create eHR User Account page had a broken HTML tag at the top.	NA	2017.1 MIU
Defect	A log-in with an expired eHR account showed a successful log-in record.	NA	2017.1 MIU

Financial Management

Financial Management			
Type	Description	Case Number	Fix Version
Warranty	The performance of the Contract Inquiry page has been improved.	5686888	2017.1 MIU
Defect	Purchase order forms were printing incorrectly.	NA	2017.1 MIU
Defect	The <i>Requisition Number</i> on the TylerForm was using the <i>Resolution Number</i> field from within New World ERP.	NA	2017.1 MIU
Defect	Printing a Change PO did not indicate it was a Change PO, even if the box to show the change watermark was selected.	NA	2017.1 MIU

Financial Management			
Type	Description	Case Number	Fix Version
Defect	Purchase order addresses appeared on two lines.	NA	2017.1 MIU
Defect	Requisitions did not include department descriptions.	NA	2017.1 MIU
Defect	The ampersand (&) was doubling in item descriptions.	NA	2017.1 MIU
Defect	Requisition addresses appeared on one line.	NA	2017.1 MIU
Defect	Requisitions were showing full state names instead of abbreviations.	NA	2017.1 MIU
Defect	Accounts Payable invoice numbers showed incorrectly as EFT.	NA	2017.1 MIU
Defect	The <i>Payer Address</i> appeared on multiple lines.	NA	2017.1 MIU
Defect	The following appeared on multiple lines in the New World XML data: » Miscellaneous Billing Customer Statement customer name, city, state and zip » Invoice number	NA	2017.1 MIU
Defect	The XML data from Miscellaneous Billing was doubling ampersands (&) in customer names.	NA	2017.1 MIU
Defect	The Accounts Payable bank address appeared on multiple lines.	NA	2017.1 MIU
Defect	The requisition vendor and contact name needed to be changed.	NA	2017.1 MIU
Defect	A long department name did not fit on a purchase order.	NA	2017.1 MIU

Licensing

Licensing			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	New World ERP has been updated to read SC to Feature details from a new mapping file.	NA	2017.1 MIU

myInspections

myInspections			
Type	Description	Case Number	Fix Version
<i>Product Improvement</i>	Users are prevented from logging into myInspections without a device ID.	NA	2017.1 MIU
<i>Product Improvement</i>	Logging has been added to the event tracker so Apple Push Notifications, errors, report generation and connection attempts can be tracked.	NA	2017.1 MIU
<i>Warranty</i>	Users were logged out sporadically or after losing a connection.	5920665	2017.1 MIU
<i>Defect</i>	The result report was not received when an inspection was completed with a Conditional Pass status.	NA	2017.1 MIU