

Document: 15.717.765 - Exact e-Synergy - North America Release Notes ES372



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North America Release Notes Exact e-Synergy Release ES372

Announcing Exact e-Synergy Release ES372

Product: Exact e-Synergy

Release: ES372

Release Date: June 12, 2007

Exact Software is pleased to announce the release of Exact e-Synergy ES372.

e-Synergy Release ES372 incorporates a wide range of enhancements and powerful new features that have been designed to simplify tasks and provide you with extended flexibility and management tools.

Important Update Information

It is important to note that once you update to e-Synergy ES372, you will be unable to revert to a previous batch.

Important Field Service Note: At this time, Exact Field Service has not been certified for compatibility with e-Synergy Release ES372. Customers who are using any version of Exact Field Service should NOT update to Exact e-Synergy Release ES 372.

Exact e-Synergy Release ES372 is available to customers with the following installations:

Depending upon your back office application, there may be a specific sequence or procedure that will need to be followed for a successful update. Click the links below to view detailed e-Synergy upgrade information regarding integration with each back office application.

- [Standalone Exact e-Synergy Installation](#)
- [Exact Globe Enterprise Integrated Installation](#)
- [Exact Macola ES Integrated Installation](#)
- [Exact JobBOSS versions 9.0, 9.1 and 10.0](#)
- [Exact Macola Progression](#)

General Functional Changes and Enhancements

Recruitment Management

Recruitment management has been enhanced to provide your HR professionals with an effective system to manage the recruitment process. With this release, resources are now automatically notified of new vacancies and applicants instead of having to manually search the system for them. You can now view all applicant and vacancy information in one place during any stage of the application process. You can also track all documentation that is related to a resource from the moment they enter the recruitment process.

Competency Management

Release 372 has augmented the competency management function to accommodate almost any competency management system that is available in the market today. You can create nearly any type of rating scale that you need be it a graded or numbered system. You can create as many competencies as you require, and you can also create sub-layers within each competency to provide a more comprehensive evaluation. Comparison tools have been added that enable you to easily compare a resource to any part of the job system to see how that resource compares to the Job group, activity or title.

Workflow-to-Workflow Process

The workflow-to-workflow process has been enhanced to enable you to create a process flow with up to 5 different request types. You can now predefine a template for the necessary process flow and include all of the required request types and each associated status. By defining the process ahead of time, you only need to select the process template to begin the process flow. As you work through the process, each subsequent request is automatically generated as it is needed.

e-Synergy Release ES372 Release Note Details

The following enhancements debuted in e-Synergy Release 370 and are included in the e-Synergy ES372 release. They are sorted by module. Click on the individual links provided to view specific information regarding the enhancement.

System

1. [Really Simple Syndication \(RSS\)](#)
2. [Downloading 'Internal use' releases for SDK partners](#)
3. [Product Updater to Detect .NET Framework](#)
4. [Extra parameter for HRBGjobs to search domain 'Administrator' account](#)
5. [Localize processing of generating XML schema](#)
6. [Exact e-Synergy exchange changes - add a reminder setting](#)

HRM

1. [Ability to recode resource ID](#)
2. [New copy functionality for vacancy](#)
3. [Prorating of entitlement based on 'Full Time Equivalent'](#)
4. [New settings in maintenance of Request type](#)
5. [Multiple Applicants and Vacancies](#)
6. [New Vacancy Overview](#)
7. [User definable - Free definable form layout](#)
8. [User definable - Form layout listing](#)
9. [New Exam Overview in e-Synergy](#)
10. [Copy function for Process type](#)
11. [Generation of request via HR process cockpit](#)

12. [Setup of process type in intelligent process flow management](#)
13. [Setup of process request in intelligent process flow management](#)
14. [Competency management in Resource card](#)
15. [Defining & categorizing competencies into group](#)
16. [Defining field type for Competency management](#)
17. [Finding double resources](#)
18. [User Definable Form Layout](#)
19. [New copy function at resource card](#)
20. [Auto generate MRS when creating new resource](#)
21. [New fields in resource card \(US legislation\)](#)
22. [New competency copy / link functionality](#)
23. [Cost price for absence entitlement in e-Synergy](#)
24. [New filter field in resource search screen](#)
25. [New Type filtering option in maintaining payroll components per resource screen](#)
26. [Possible to link existing document from Exact e-Synergy for attachments](#)
27. [Setting of page size in log overview](#)
28. [Effective date setting at division level](#)
29. [Resource budget by division and cost center](#)
30. [Pivot Analysis for Assets in HRM](#)
31. [Interface changes on close period and regenerate entitlement](#)
32. [Calculation of entitlement based on financial period](#)
33. [Support of pro forma calculation in contract](#)
34. [Implementation of security check for vacancy resource in organization chart](#)
35. [Enhanced interface and functionality for Vacancy](#)
36. [Displaying of absences information based on type of duration](#)
37. [Enhanced interface and functionality in Multiple documents for Applicant](#)
38. [New layout on absence statistics report](#)
39. [Enhancement on anniversary overview](#)
40. [More information added to Division card](#)
41. [Enhanced interface and functionality for Applicant in e-Synergy](#)
42. [Additional Parameters have been Added to the Division Card](#)
43. [Re-arranging HRM Maintenance menu](#)
44. [Relocation of user control rights for competency field](#)
45. [Location selection in reports and search functions](#)
46. [Mail merge button made invisible in employee self service portal](#)
47. [Some changes on multiple attachments in Applicant card](#)
48. [Enhanced security checks for creation of new employee](#)
49. [Wage Scale functionality is implemented for Non-Processing Payroll](#)
50. [Removing of obsolete and redundant data in HUMRES table](#)

51. [New applicant overview](#)
52. [Prompt message displayed when overwrite MRS](#)
53. [Adjustment of FTE and MRS based on resource work schedule](#)
54. [Enable the HR role to edit Usernames](#)
55. [Overview for resource's family and reference details](#)
56. [Enhancement on employee search screen in Exact e-Synergy](#)
57. [Enhancement on free section for employee search](#)
58. [Enhancements in headcount report](#)
59. [Enhancement on focus field in the resource card](#)
60. [New selection fields in column at employee search](#)
61. [Indicator for HR authorized changes field in resource card](#)
62. [Enhancement on payroll entries report](#)
63. [New User Interface for Payroll Journal Entry report](#)
64. [Changed function rights access in resource card for payroll and payroll data page](#)
65. [Home address setting added to postal address](#)
66. [Payroll contract for contract supported countries only](#)
67. [Improvements to the log overview](#)
68. [Organization Hierarchy Charts](#)
69. [New tags added in mail merge help document](#)
70. [Customize link added to employee self-service portal](#)

Customers

1. [Reset password for Customer contact](#)
2. [Create Multiple requests from Contact Search Result](#)
3. [Improvement on CRM Contact Card](#)
4. [Display accounts that are linked when deleting an open request](#)
5. [Cleaning up of accounts](#)
6. [New Address Type](#)
7. [" NEW: Employer" button in account card](#)
8. [Contract prolongation by running price list](#)
9. [Addition of Cost center and Security level to CRM Search](#)
10. [Add project to customer pivot analysis](#)
11. [Show where an account is linked to prior to deleting it](#)
12. [Merging of accounts with GUID and Number free field](#)
13. [Description and Heading fields have been extended to a maximum 60 characters](#)
14. [Batch update of security level for customer account card](#)
15. [Improved functionality for CRM search](#)
16. [Account and contact free fields in workflow search](#)
17. [Main Icon added to Contact card](#)

18. [Synchronizing all portal access granting and notification](#)
19. [Extra validation on resource maintain language field](#)
20. [Merging of contact persons includes the ability to copy important information](#)
21. [Batch update of contacts](#)

Logistics

1. [New functionality Export data to MS Excel](#)
2. [Bill Of Materials \(BOM\) at Exact e-Synergy](#)
3. [BOM Planning in Exact e-Synergy](#)
4. [Creating Exact Globe Enterprise sales order from Exact E-Synergy](#)
5. [New functionality - BOM Report](#)
6. [New field Classification \(Tax\) to Item Maintenance when settings Use tax module is ON](#)
7. [Maintain Item - to add in country specific tax legislation](#)
8. [Price lists based on item assortment](#)
9. [Item card customization](#)
10. [Display invoice details at Contract Card](#)
11. [Changes in the data display in Serial Number Report](#)
12. [Ability to Define the Highest Release Available for Customers to Download](#)
13. [Recode / Promote Assortment Releases](#)
14. [Work In Progress \(WIP\) In Exact e-Synergy](#)
15. [Serial/Batch Number Column in Exact e-Synergy Realization](#)
16. [Fulfillment / receipt rights control in Exact e-Synergy](#)
17. [Additional Filter options have been added to the "To Purchase" report](#)
18. [Allow selection of supplier division in purchase request](#)
19. [Invoice request type for 'Request - Shopping'](#)
20. [Additional option for item assortment movement](#)
21. [Functional Change in Repository Clean up](#)

Projects

1. [Realization - Reject hour entry with task request generation](#)
2. [Job Activity Report \(1\)](#)
3. [Job Activity Report \(2\)](#)
4. [Entry Report](#)
5. [Productivity Report](#)
6. [Interactive Balance Report in Exact e-Synergy](#)
7. [Project transaction report](#)
8. [Project Function Right 525 - Authorize hour entry](#)
9. [Material Requirements Planning \(MRP\) in Exact e-Synergy](#)
10. [Pegging report in Exact e-Synergy](#)
11. [Changes to 'My projects'](#)
12. [Project Planning Enhancement](#)
13. [Project card - Financial & budget section moved to Financial button](#)

14. [All resources for cost center and resource planning report](#)
15. [Project planning report sorting](#)
16. [Expense Claim via Hour Entry](#)

Workflow

1. [New manual entry functionality for absence labor hour entry](#)
2. [Process flow](#)
3. [SFA pipeline and sales funnel management](#)
4. [Time zone in Calendar request type](#)
5. [Time fields in request form](#)
6. [Enhancement on workflow pivot analysis](#)
7. [Pivot analysis - Enable filtering criteria using free fields](#)
8. [Security level in Task for rejected document](#)
9. [Improved functionality for Workflow search](#)
10. [Workflow to Workflow module](#)
11. [Workflow mail merge](#)
12. [Customer request merge](#)
13. [MRP Request in Exact e-Synergy](#)

Documents

1. [Validation when deleting a document](#)
2. [Changes in document](#)
3. [Extending RSS function for e-document](#)
4. [Consistency check for web repository components](#)
5. [Finding documents via quick search for all users](#)
6. [Sending document to email](#)
7. [Directly displaying document attachment](#)
8. [Related requests to include GUID document field](#)

Cash Flow

1. [New "Created bank files report" functionality in Cashflow](#)
2. [Currency code added in cash instrument recode page](#)
3. [Editable fields in Cash instrument maintenance](#)
4. [Cash flow instrument maintenance](#)
5. [Checking on bank account number](#)
6. [Maturity Date added to the Cash Flow entry screen](#)
7. [Credit card type has been added as a filter option](#)

Financials

1. [Improve paging option when viewing a report](#)
2. [New features for "Budget Scenario Maintenance" in Financials](#)
3. [Use tax module: Maximum number of 5 tax codes for all legislations except Netherlands](#)
4. [Maintain Tax Schedule application](#)
5. [Maintain Tax code - add the country specific tax functionalities](#)
6. [Batch update for tax schedule](#)

7. [New Tax Exemption Number field in Customer Card](#)
8. [Expand or collapse default view for Balance Sheet and Profit & Loss](#)
9. [New "Balance list" functionality in Financial s](#)
10. [Enhancement on Customer and Supplier Cards in Financials](#)
11. [Enhancements on Employee transaction card](#)
12. [Extra filters for Balance List, Realization and Resource reports](#)
13. [Ability to Replicate an Entire Financial Year, or Period](#)

Assets

1. [e-Synergy Low Value Asset](#)
2. [Asset Write Off](#)
3. [Creating financial entry from fixed asset maintenance](#)
4. [Ability to Sell a Fixed Asset](#)
5. [Asset Balance List Report - Alignment of Exact Globe functionality with Exact e-Synergy](#)
6. [Asset List Report - Alignment of Exact Globe functionality with Exact e-Synergy](#)
7. [Asset Depreciation Plan Report - Alignment of Exact Globe functionality with Exact e-Synergy](#)
8. [Asset Transaction Button and Transaction Linking/Unlinking](#)

SDK

1. [New properties and submit method added to CSSDKBuildASP](#)
2. [SDK Custom Button Can Be Added To BDDocument.asp](#)
3. [New Add-on fields search in e-Synergy](#)
4. [SDK Custom Field Can Be Added To EPRequest.asp](#)

Mobile

1. [New layout for e-Mobile start page](#)
2. [New layout for e-Mobile workflow](#)
3. [Outlook Change in Request Type List for Mobile Application](#)
4. [e-Mobile: Additional buttons for requests](#)

ESS Portal

1. [New employee self-service section in HRM settings](#)

Microsoft Office Add-In

1. [New uninstall feature for Microsoft Office Add In](#)
2. [Download a single resource at one time](#)

Documentation - Articles, Document: 15.717.765



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