Sage 300 People

Release Notes
22.1.1.0

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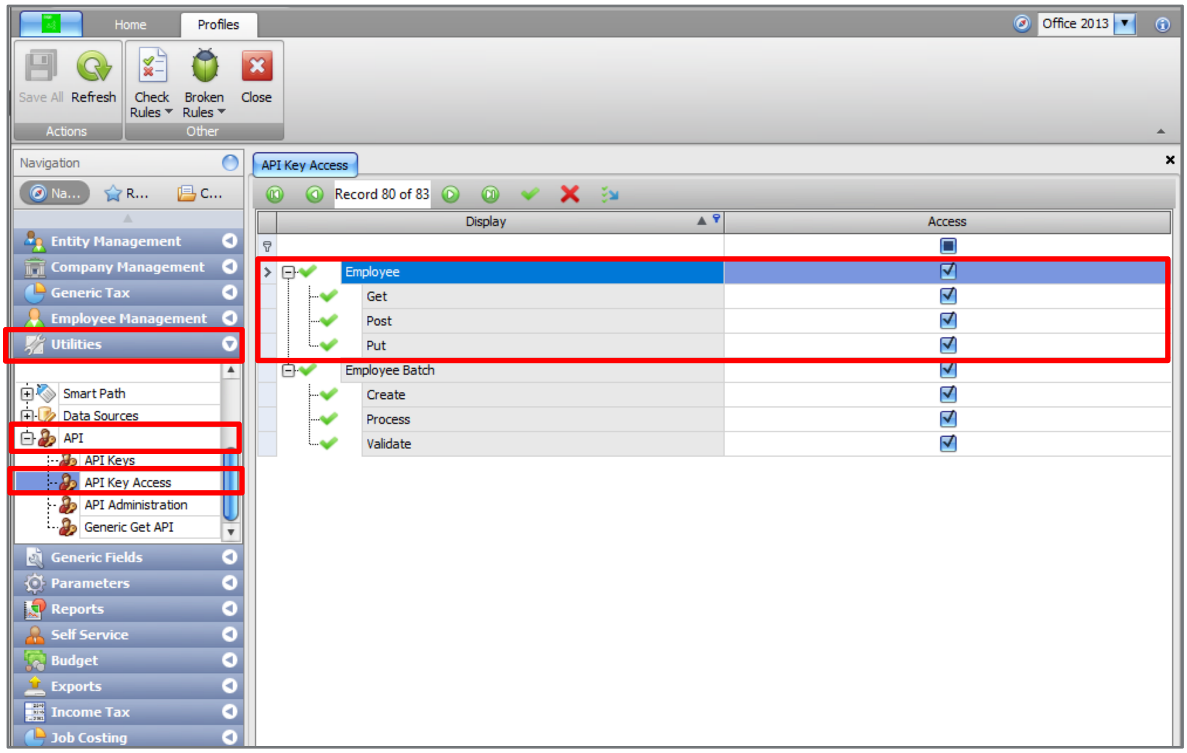
1.0 API

1.1 New API available

1.1.1 New Single Header Employee API

A new API was added to create and update employee details in one call. The data will also process directly to the database and will not follow the route of the existing APIs to Create the Header and Line, Validate and Process.

The existing Employee API is still available and was renamed to Employee Batch.



1.2 Update on existing APIs

1.2.1 Create Lines

The following two API's were updated to allow a user to "Create Lines"

- Update Payslip – Definition
- Update Payslip – Line Amount

If the Payroll Definition does not exist on the employee's Payslip Definition screen, and CreateLine = True, the definition will be added to the employee's record via the API. If this is set as false, an error will display, indicating that the information could not be processed as the line/s do not exist.

The Payroll definition must exist on Company Management | Payroll Definitions under the applicable type.

1.2.2 Generic Get Parameters

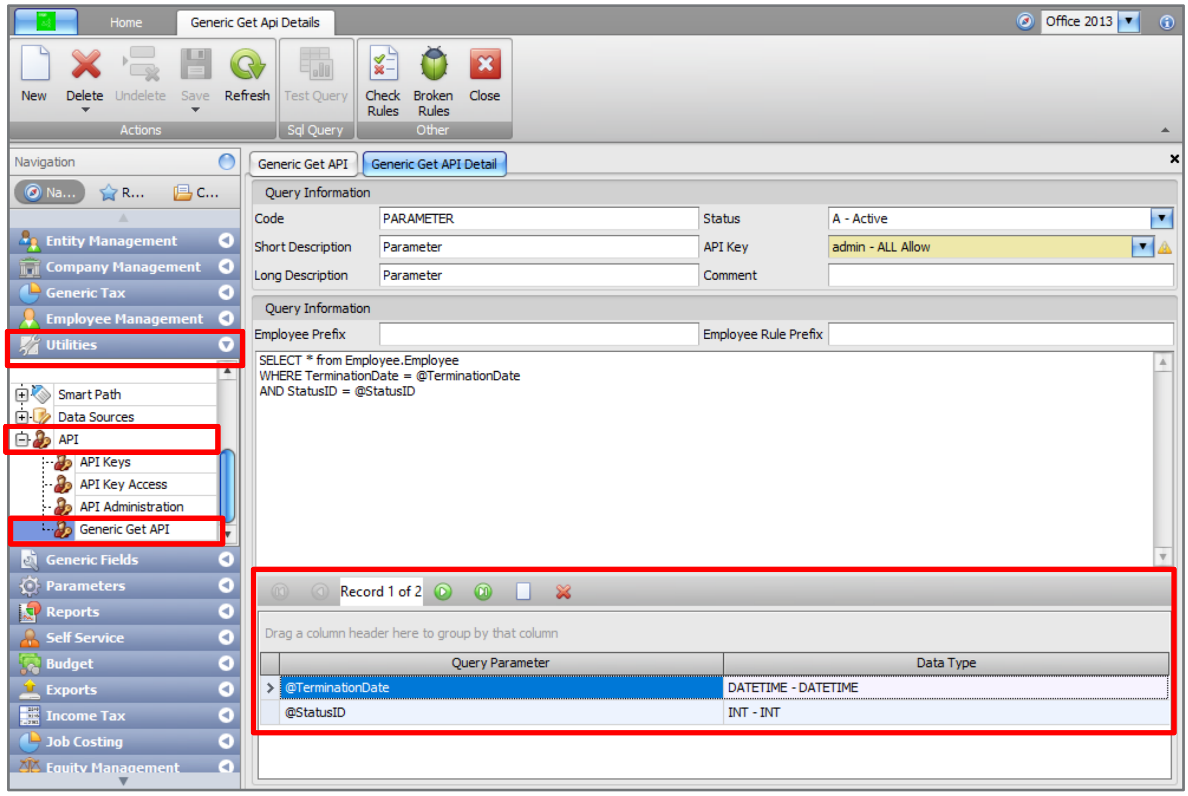
Parameters can now be added to the SQL query for the Generic Get

On the Navigation pane:

Expand **Utilities**

Expand **API**

Double-click on **Generic Get API**



As parameters are specified in the query detail section, the parameter will be added automatically to the grid on the bottom of the screen to be configured. A data type must be completed per parameter. The data types will define the expected input from the API call.

The following types of data is available:

Code	Description
INT	Integer
DECIMAL	Decimal
VARCHAR	Varchar
BOOLEAN	Boolean
DATETIME	Date Time
UNIQUE	Unique Identifier

The parameters set in the SQL query must match the parameters configured in the grid.

The parameters set and configured in the query will be used in API to pass the actual values:

```json
{
    "QueryParameterList": [
        {
            "QueryParameterString": "@TerminationDate",
            "ParameterValue": "2021/12/31"
        },
        {
            "QueryParameterString": "@StatusID",
            "ParameterValue": 3
        }
    ]
}
```

When a parameter is added to the query detail the "Test Query" button in the top ribbon will be disabled.

Refer to the updated API Documentation for more detail.

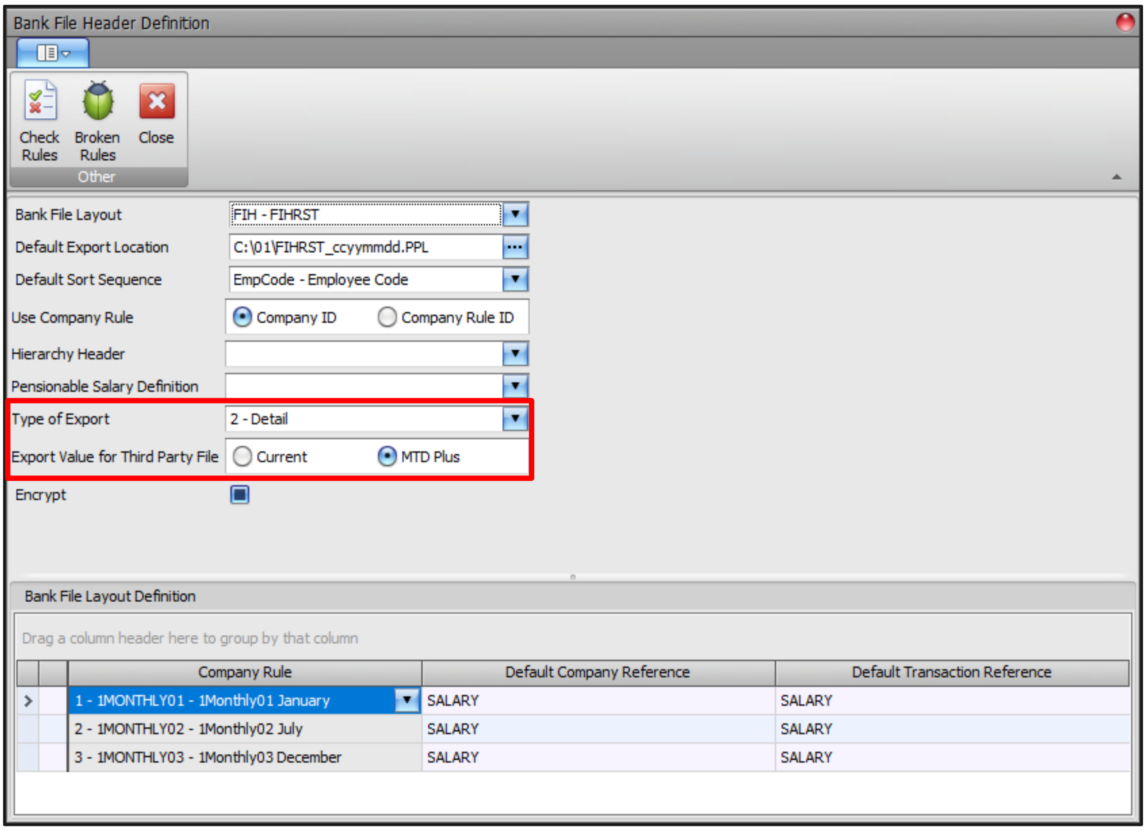
2.0 Bank Files

2.1 FIHRST Bank File – added option to export MTD+ values

FIHRST Bank requested that we add the option to export MTD+ values for third party payments for non-monthly company rules.

On the Bank File Header Definition screen you now have the option to select if Current or MTD+ values must be exported for non-monthly company rules – this is only applicable to the Third Party/Beneficiary export option when you have selected the 'Detail' option for 'Type of Export'. The option to export MTD+ values does not apply when exporting net pay amounts.

The MTD+ values to export are applicable on all financial value fields, e.g. earnings, standard deductions, external payment deductions, loans & savings deductions, company contributions, RFI, Pensionable Salary, etc.

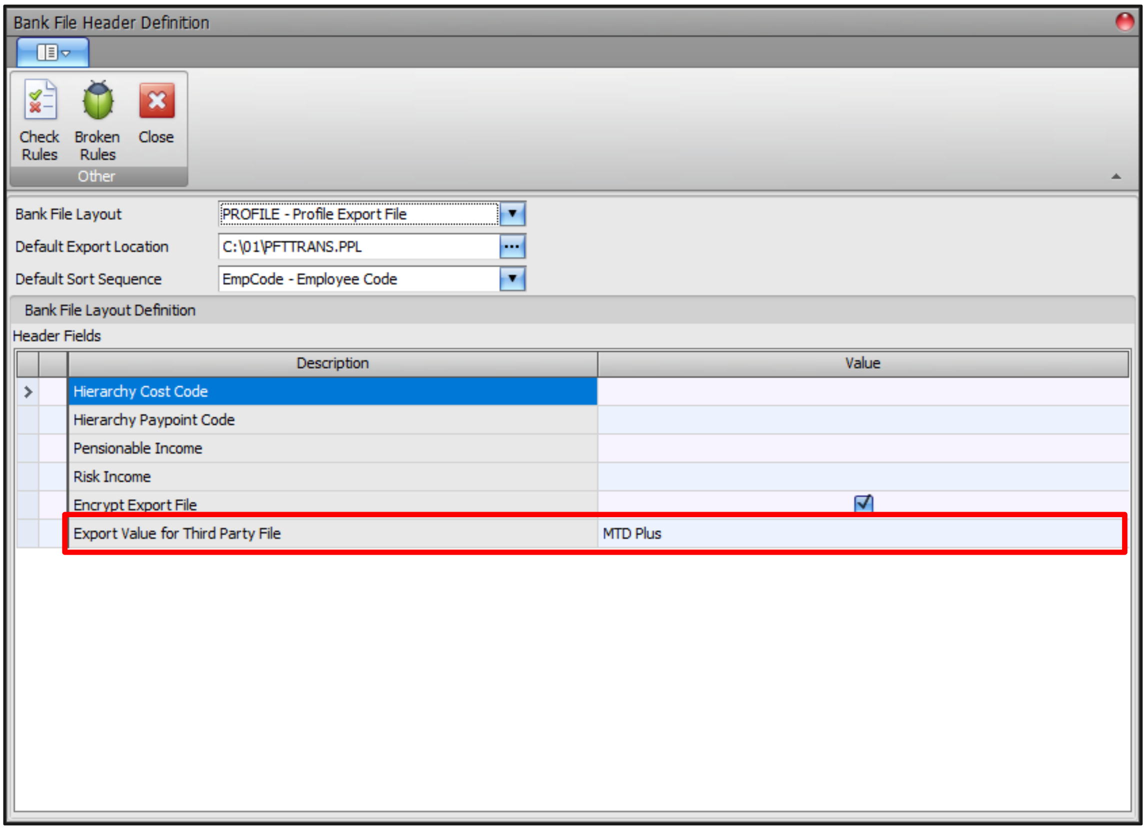


2.2 Profile Bank File – added option to export MTD+ values

Profile Bank requested that we add the option to export MTD+ values for third party payments for non-monthly company rules.

On the Bank File Header Definition screen you now have the option to select if Current or MTD+ values must be exported for non-monthly company rules – this is only applicable to the Third Party/Beneficiary export option. The option to export MTD+ values does not apply when exporting net pay amounts.

The MTD+ values to export are applicable on all financial value fields, e.g. earnings, standard deductions, external payment deductions, loans & savings deductions, company contributions, RFI, Pensionable Salary, etc.



3.0 Batches

3.1 ESS User Take-On Batch

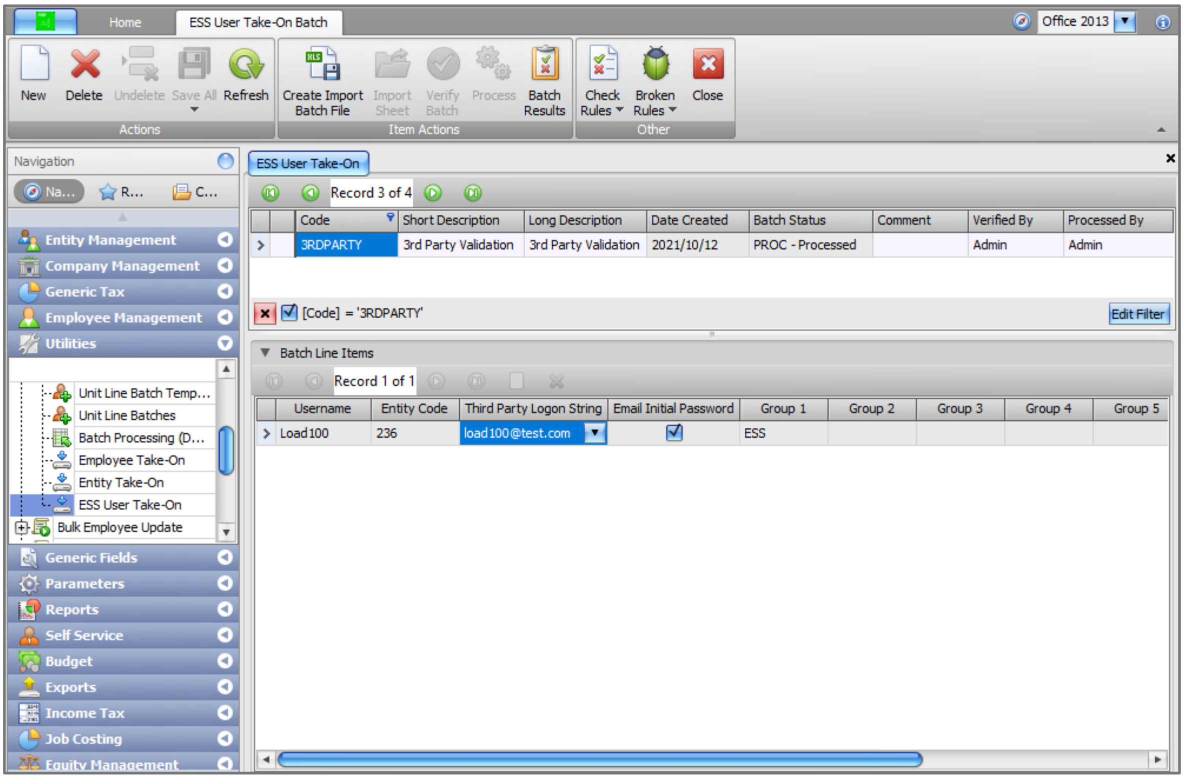
On the Navigation pane:

Expand **Utilities**

Expand **Batches**

Double-click on **ESS User Take-On**

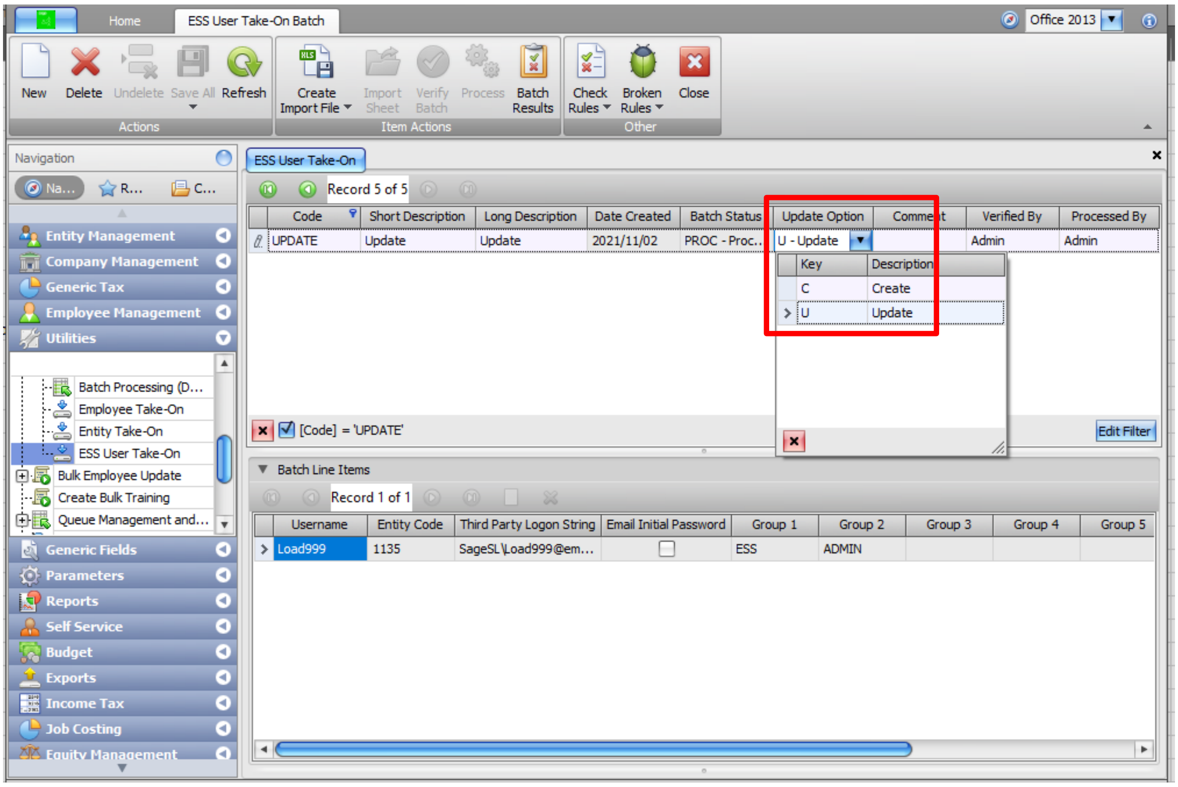
The Third Party Logon String field can be processed with or without specifying a domain.



Changes were made to the batch to update existing users. When creating a new ESS User Take-on batch the user can now select to:

- C – Create
- U – Update

When the user selects to Update, data in the import sheet will override the data on the system.



The user can also select to Create Import File:

- Create blank file
- Create file with data

The following validations will apply when updating existing users:

Field	Table subtitle
VIPUserName	If the user has not attempted to login with their username and password, this field can be updated. If a user tried to login, this field cannot be changed.
EntityCode	If the user has not attempted to login with their username and password, this field can be updated. If a user tried to login, this field cannot be changed.
ThirdPartyLogonString	Enter third party logon string details if applicable
EmailInitialPassword	Data in this column cannot be updated – leave blank
Group1	Specify linked group details
Group2	Specify linked group details
Group3	Specify linked group details
Group4	Specify linked group details

Group5	Specify linked group details
InitialPassword	Data in this column cannot be updated – leave blank
FinancialAccess	Specify the financial access

3.2 Medical Aid System Batch

The Medical Aid system batch was improved to include the start date, previously when processing medical aid via the batch, the start date was defaulting to the employee's date engaged.

Now when a new medical aid plan is processed, the previous medical aid plan will update to inactive and the end date will default to a day before the new medical aid start date.

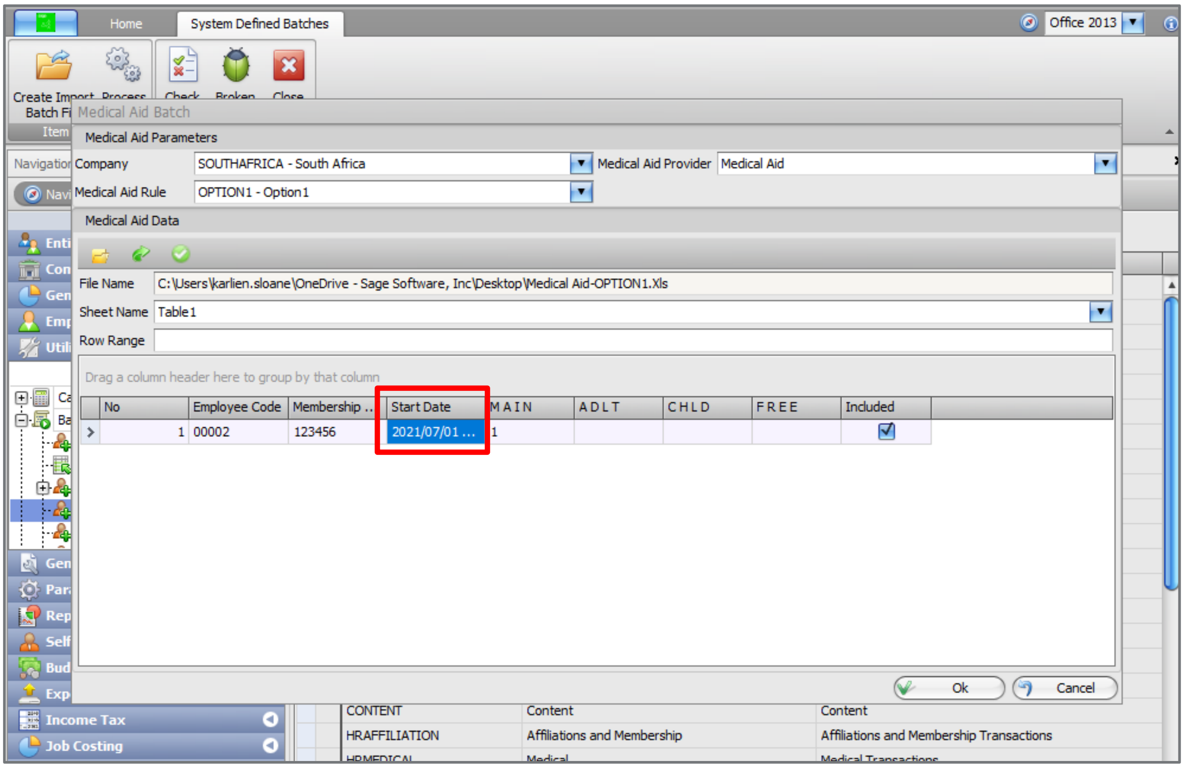
On the Navigation pane:

Expand **Utilities**

Expand **Batches**

Double-click on **System Defined Batches**

Select **Medical Aid**



4.0 General

4.1 Audit Detail – Security Users

On the Navigation pane:

Expand **System Tools**

Expand **Audit**

Double-click on **Audit**

Create, update, Insert and delete on Security | Users, are now recorded on the Audit Detail.

4.2 Employee: Increases

An Increase Type field was added to the employee increases functionality to indicate whether the increase is an amount or percentage type.

On the Navigation pane:

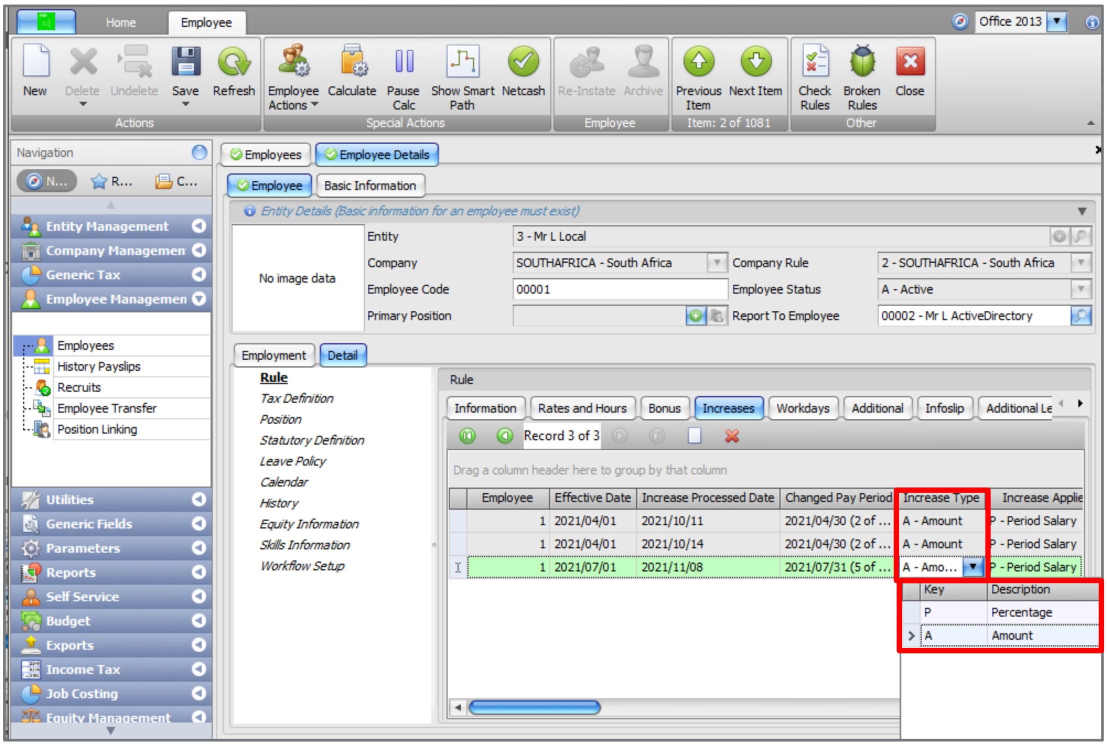
Expand **Employee Management**

Double-click on **Employees**

Double-click on **the applicable employee**

Select **Detail**

Click on **Increase**



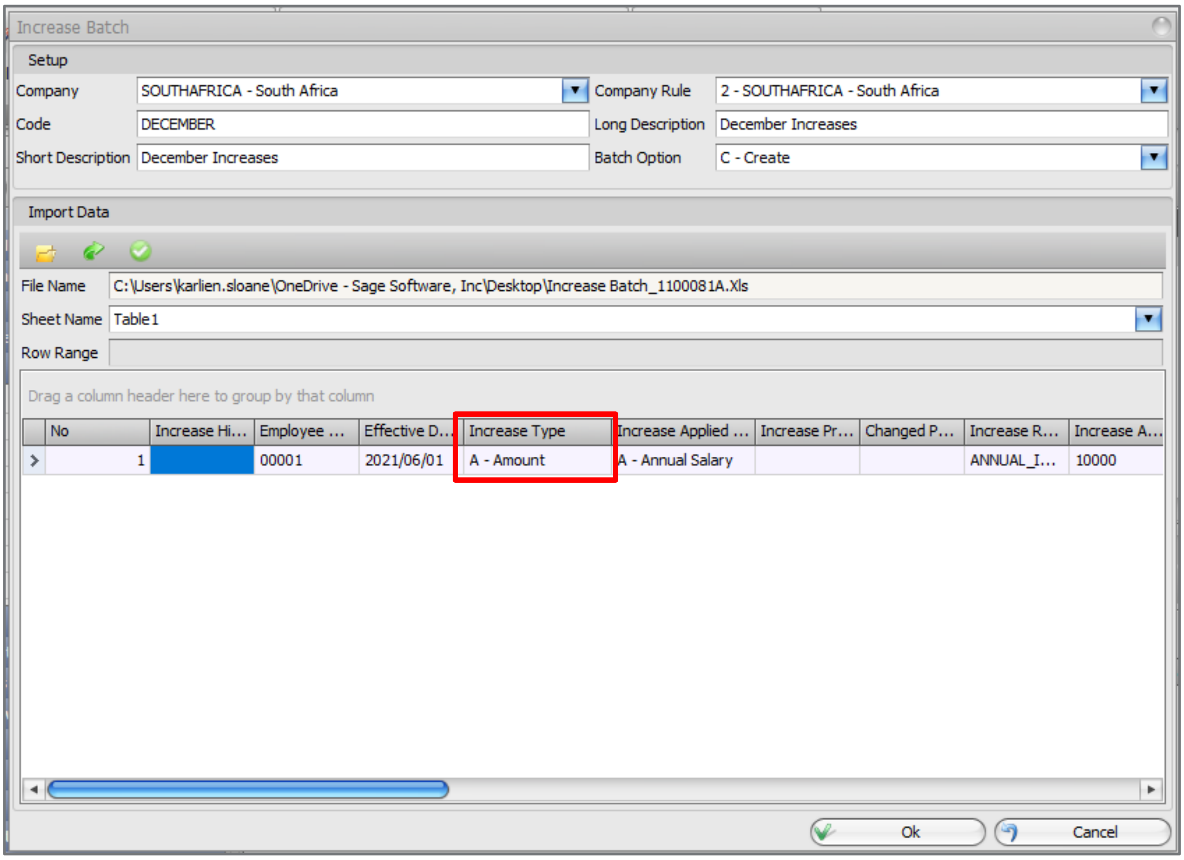
On the Navigation pane:

Expand **Utilities**

Expand **Batches**

Expand **System Batches**

Double-click on **Increase Batch**

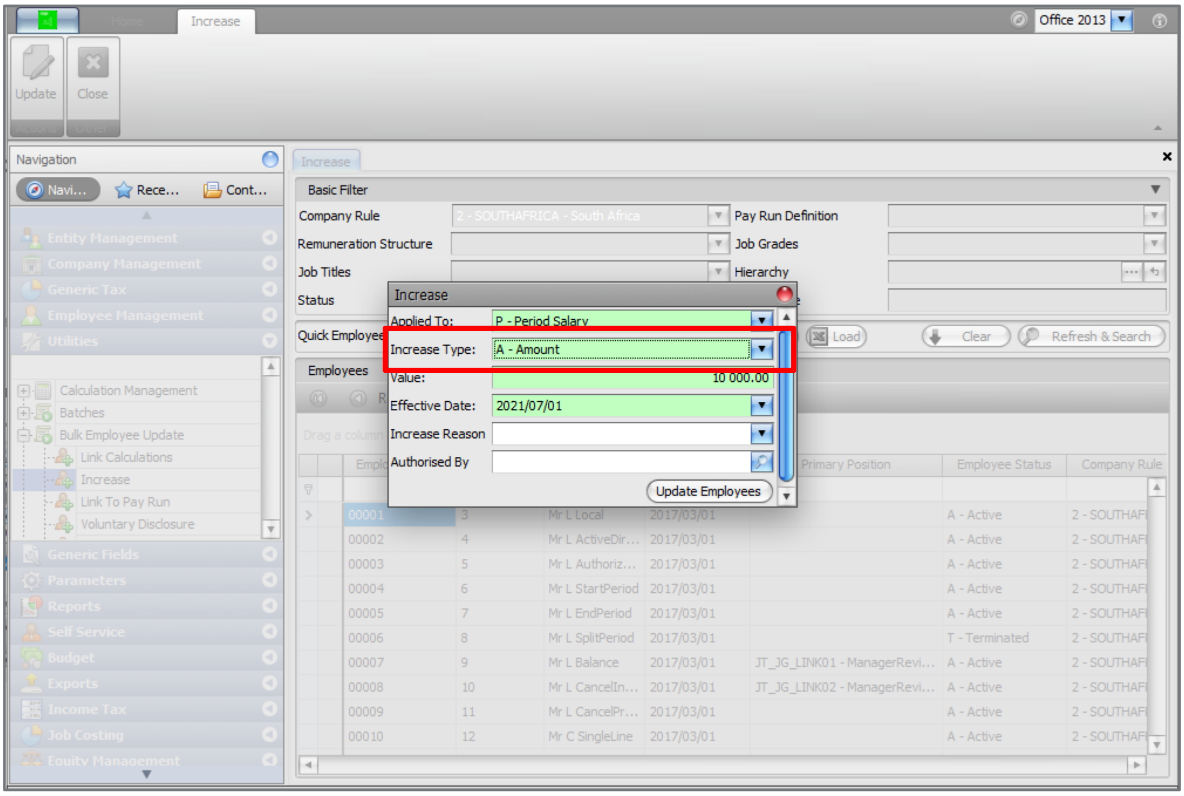


On the Navigation pane:

Expand **Utilities**

Expand **Bulk Employee Update**

Double-click on **Increase**

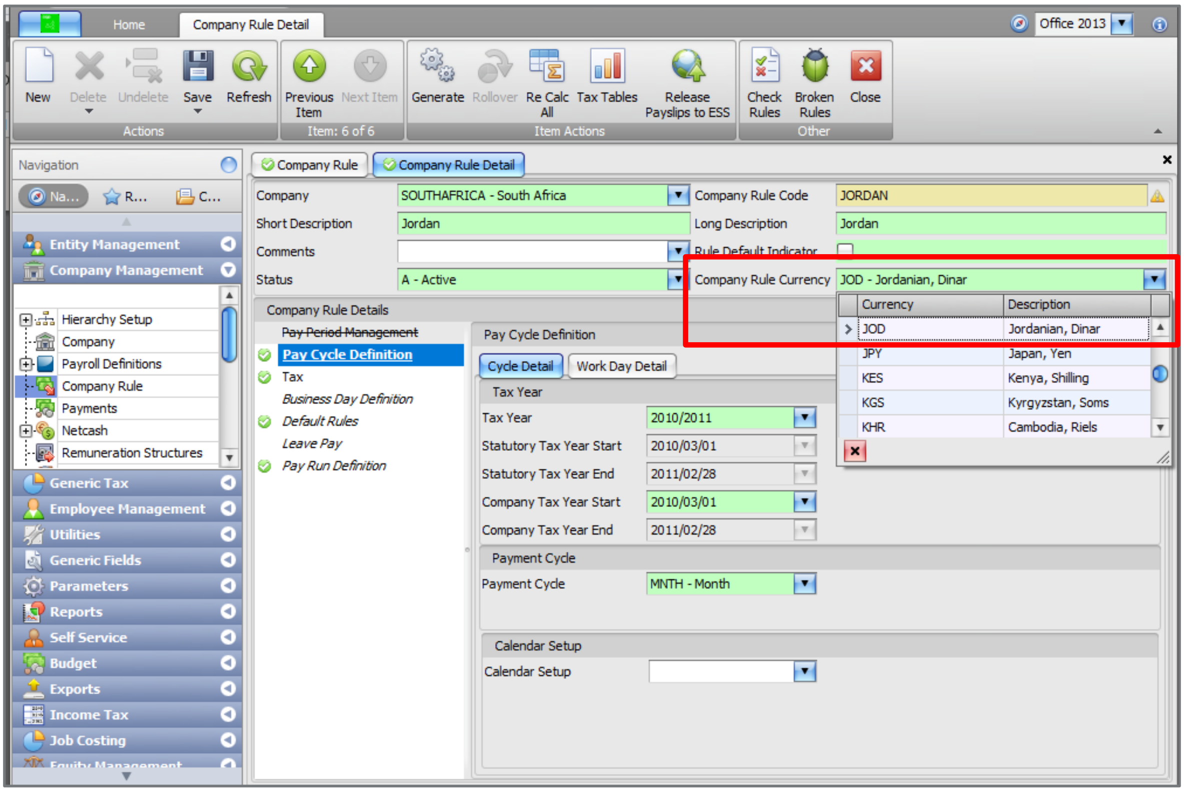


4.3 Jordan Currency

On the Navigation pane:

> Expand **Company Management**
> Double-click on **Company Rule**
> Select to **Create New Company Rule**

The Jordanian Dinar is available to select as a Company Rule Currency.



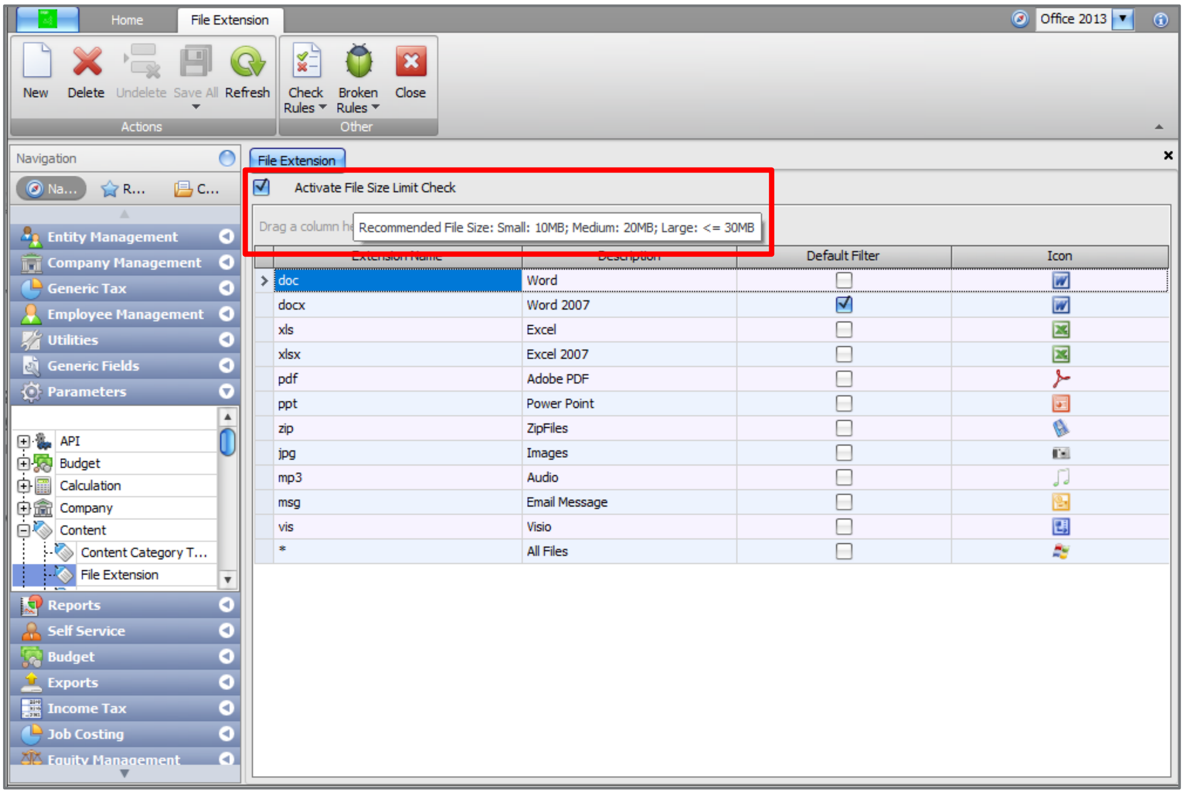
4.4 Limit File Size

On the Navigation pane:

Expand **Parameters**

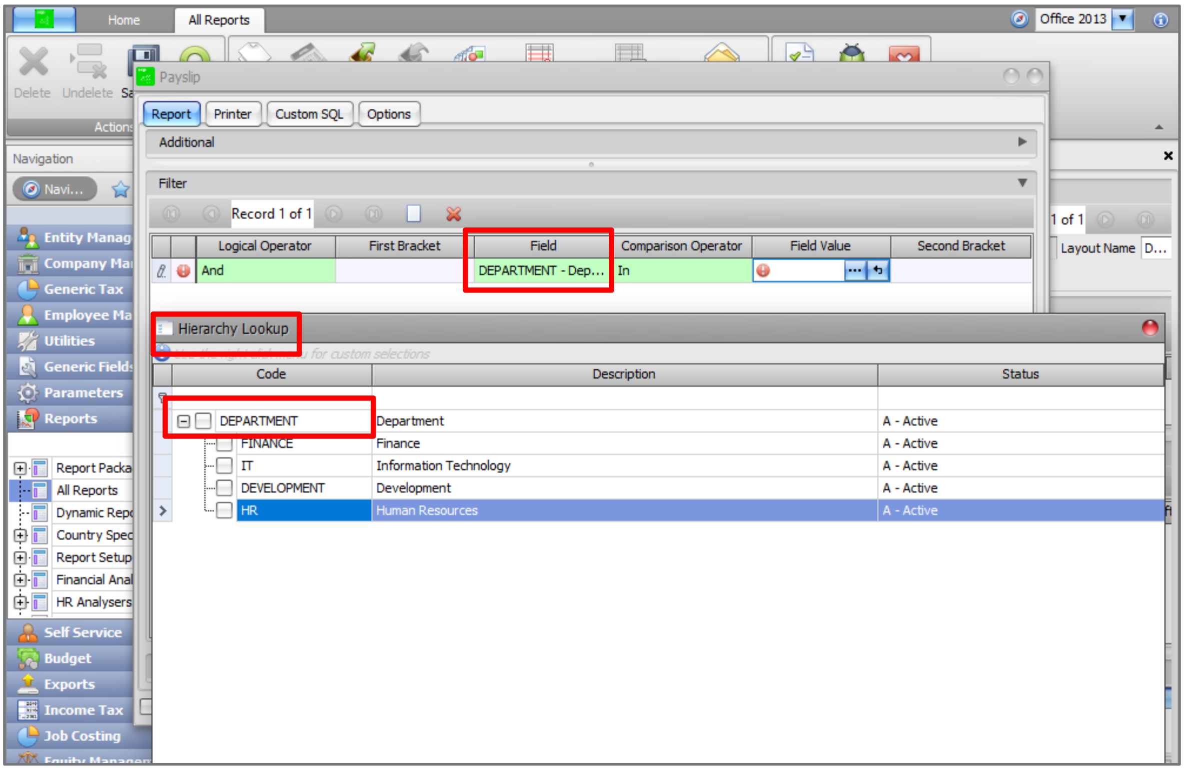
Expand **Content**

Double-click on **File Extension**



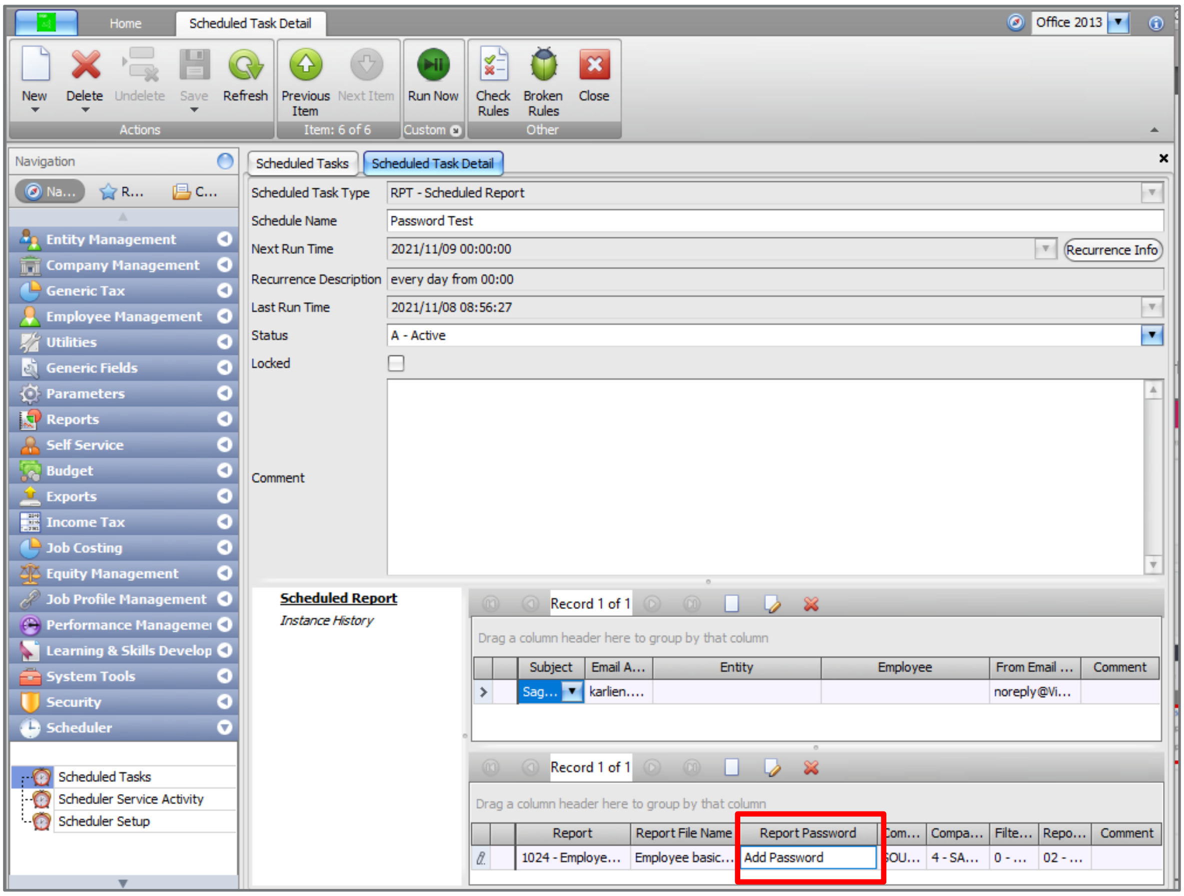
4.5 Reports: Hierarchy Filters

The report filters were enhanced to only show the selected hierarchy/ies in the hierarchy lookup list.



4.6 Scheduler: Scheduled Reports Password

The ability to specify a password on the scheduled task type for Scheduled Report was added, the recipient of report will need to use the specified password when opening the document. The password set on the task must be supplied to the recipient. This only applies to PDF documents.



4.7 Remove and Rename Outdated Africa Statutory Reports

The following Africa Statutory reports were removed from the menu:

- Namibia: NAMVETLEV202104 – VET Levy Do Not Use
- Kenya: ITAXP10 – iTax P10 (Up to 2015)
- Kenya: P9AP9BTAXDED – P9AP9B (up to 2015)
- Zimbabwe: ZIMNSSAP – Zimbabwe P4 NSSA

The following Africa Statutory reports were renamed and must be used going forward:

- Kenya: ITAXP10_2016 renamed to ITAXP10 – iTax P10
- Kenya: P9AP9BTAXDED – P9AP9B_2016 renamed to P9AP9BTAXDED – P9A P9B Tax Deduction Cards

5.0 Payroll

5.1 Ghana - Update Tax Type and Tax Percentage for Retirement Fund Contributions

The taxability for Retirement Fund deductions and company contributions was updated in the Ghana generic tax file but the taxability for retirement fund contributions for existing deduction and company contribution definition lines is not updated when importing the latest generic tax file.

When upgrading to this release the existing deduction and company contributions for retirement funds, including SSNIT is updated as per compliance requirements.

Refer to the Ghana release notes for December 2021 for more detail on these changes.

5.2 Nigeria - Update Tax Type on Definitions from Periodic to Normal Tax Calculations

The taxability for periodic taxable earnings was updated in the Nigeria generic tax file from Periodic to Normal Taxable but the taxability for existing periodic earning definition lines is not updated when importing the latest generic tax file.

When upgrading to this release the existing periodic earning definition lines is updated from periodic to normal taxable.

Refer to the Nigeria release notes for December 2021 for more detail on these changes.

5.3 Gambia - Update Earning Type Tax Type and Delete Tax Calculation

The preferred method of calculating PAYE is the non-cumulative (monthly) tax method and therefore the concept of Periodic Taxable Income does not apply.

When upgrading all earnings with taxability of Periodic is changed to Normal. In addition to this change, we also updated all approved Pension, Provident, Retirement and the Widow and Orphans Fund deduction to not be tax-deductible as the Gambia compliance does not allow for these deductions to be tax-deductible.

We updated the Gambia generic tax file to update the tax calculation to apply a monthly tax calculation instead of an annual YTD calculation.

Refer to the Gambia release notes for December 2021 for more detail on these changes.

6.0 Performance Management

6.1 Performance Management Reports

6.1.1 Contract and Review Overview Report

On the Navigation pane:

Expand **Reports**

Expand **All Reports**

Expand **Performance**

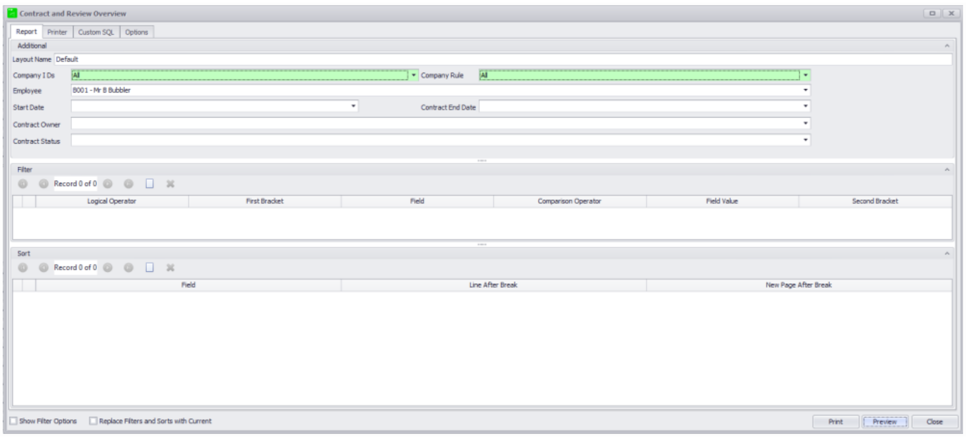
Double-click on **Contract and Review Overview**

A new report has been added to the system where the below database objects has been made available in the report designer field list:

- Additional fields from the Employee Object
- Full Contract Object
- Full Review Object
- Full Review Result Object

This will allow business partners who specialise in report customisation to expose data from all these tables in one report.

The standard report will return per employee the Performance contract with all reviews linked on the specific performance contract whether it has been completed or still incomplete.



Contract and Review Overview

Employee Details

Employee code	B001	**Employee Name**	Mr B Bubbler
Date Engaged	2019/03/01	**Position**	Main Template
Employee Reports To	A001 - Mrs A Angus	**Position Start Date**	2019/03/01
Job Title	Financial Manager	**Duration in Position**	0
Job Grade	Patterson E		

Contract Setup

Contract Name	Oct - Sep 2020
Contract Status	Approved
Contract Cycle Start	2020/10/01
Contract Cycle End	2021/09/30
Contract Owner	Mrs A Angus

Contract Criteria: Competency

Competency Area	Competency	Sub Competency	Norm	Weight	Strategic Objective	Behavioural Indicator	Measurement	Evidence	Target	Comment
							MEASURE2			

6.1.2 Reports available on WebSS

The above new report is available on WebSS under the Reports menu option. This can be changed under the ESS Report Type on 300People if required.

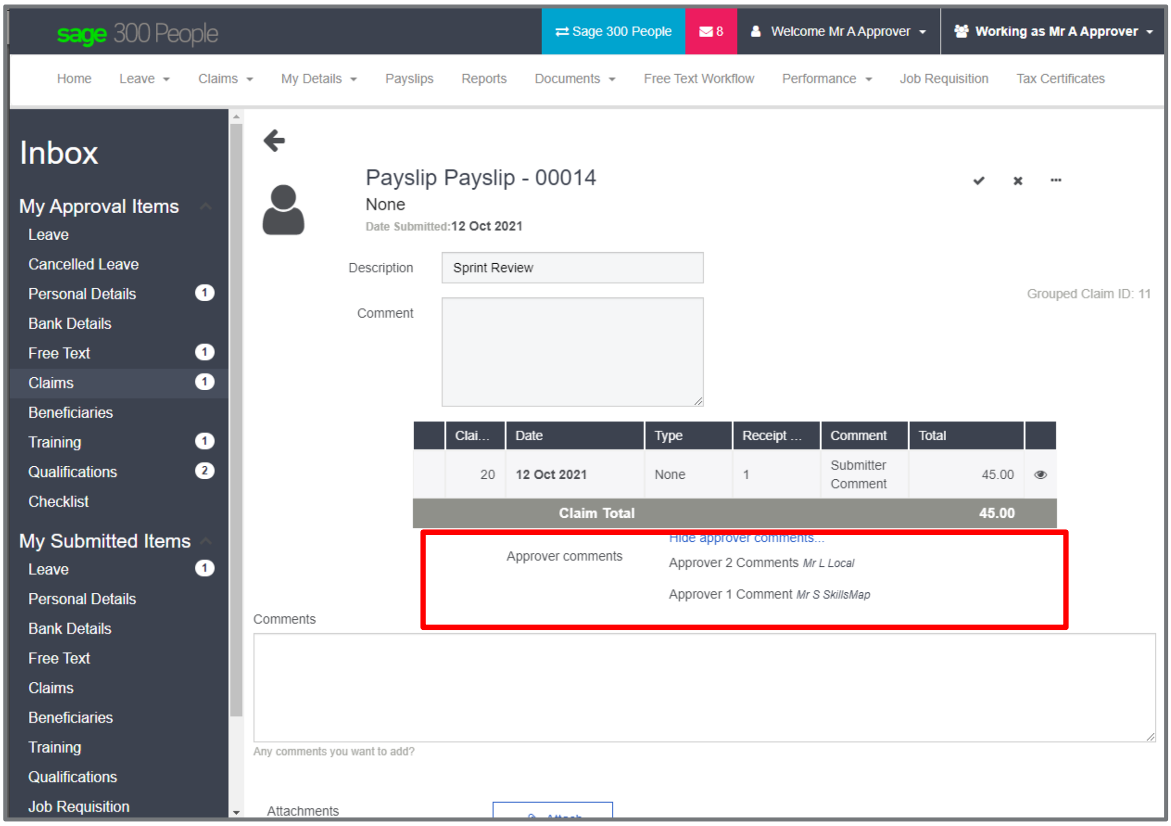
6.2 Criteria deleted on Contract create, delete from the template

During the contract initiation process the user can amend the contract criteria which comes from the Performance Template selected, unfortunately when the criteria items was deleted during the initiation process it was also removed from the template. This bug has now been fixed and the Performance Template will not be changed during the Contract initiation process.

7.0 Self Service

7.1 View Previous Approver Comments

On Grouped claims the previous approver comments were added to the screen layout for the current approver to view, before actioning the workflow.

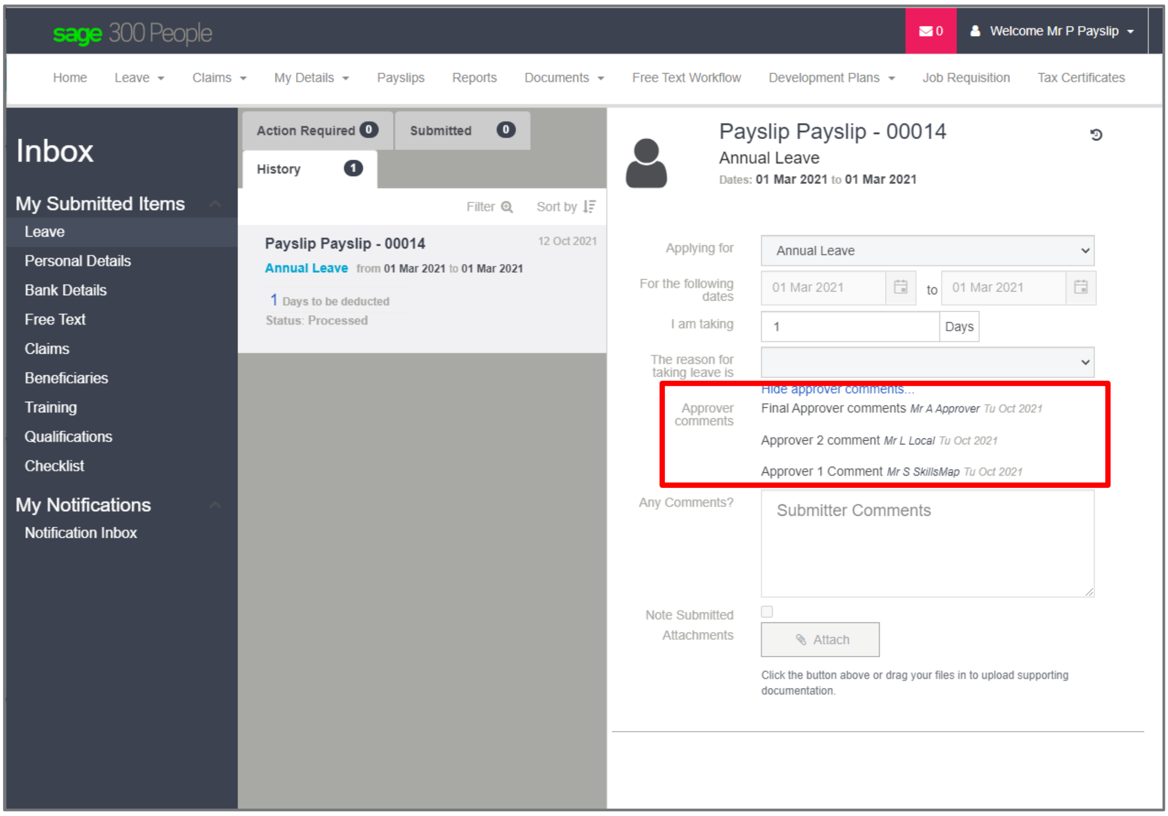


7.2 View Approver comments on History

On My Submitted Items, under History Items, the approver comments section were added for a user to view approver comments on processed workflows.

This applies to the following workflows:

- Leave
- Personal Details
- Bank Details
- Claims
- Beneficiaries
- Training
- Qualifications


sage 300 People
0
Welcome Mr P Payslip
Home
Leave
Claims
My Details
Payslips
Reports
Documents
Free Text Workflow
Development Plans
Job Requisition
Tax Certificates
Inbox
My Submitted Items
Leave
Personal Details
Bank Details
Free Text
Claims
Beneficiaries
Training
Qualifications
Checklist
My Notifications
Notification Inbox
Action Required 0
Submitted 0
History 1
Filter
Sort by
Payslip Payslip - 00014
12 Oct 2021
Annual Leave from 01 Mar 2021 to 01 Mar 2021
1 Days to be deducted
Status: Processed
Payslip Payslip - 00014
Annual Leave
Dates: 01 Mar 2021 to 01 Mar 2021
Applying for
Annual Leave
For the following dates
01 Mar 2021
to
01 Mar 2021
I am taking
1
Days
The reason for taking leave is
Hide approver comments...
Approver comments
Final Approver comments Mr A Approver Tu Oct 2021
Approver 2 comment Mr L Local Tu Oct 2021
Approver 1 Comment Mr S SkillsMap Tu Oct 2021
Any Comments?
Submitter Comments
Note Submitted
Attachments
Attach
Click the button above or drag your files in to upload supporting documentation.

8.0 Bug Fixes

8.1 API

8.1.1 Employee Termination Reason

The error message was updated to be more user friendly when sending through a termination date without a termination reason.

8.1.2 Line Type = Private Contribution

When attempting to update the payslip line amount or payslip definition and the line type is set as private contribution, the line did not update. This was corrected.

8.1.3 Multiple Tax Records

If an employee has more than one tax record, the values were added to the first closed payslip. This was corrected to update the open payslip.

8.1.4 Reports to Employee and Reports to Position

When trying to validate the line or header and the data is not correct and message was returned referring to training transactions. This was changed to return the correct validation error message.

8.1.5 Stop All

If the period status is set to Stop All, the following message will return when trying to validate the API:
"success": false, "message": "The period status is set to Stop All Entry for this period."

8.1.6 Transaction Code

The validate line and validate header responses were updated to return a more user-friendly message.

8.2 Batches: Content Batch

If two employee records exist with the same employee code in different companies, the content batch gave an error, “Object is not valid and cannot be saved.” when trying to import content on one of the employee records. This was resolved.

8.3 Budget

8.3.1 Exclude Definitions

Only payroll definitions linked to the Main Pay Run was available to exclude on the budget setup. This was corrected and all payroll definitions on all pay runs are now available to exclude.

8.3.2 Import Budget Lines

When selecting to export specific positions, all positions were exported. This was corrected to only export the correct selections.

8.4 Exports

8.4.1 TERS UIF Export

The exports was updated to return the applicable calendar year records specified and not to duplicate employee records anymore.

8.5 Increases

In some instances, a user will zero out the rates and hours screen. When a new increase transaction is loaded, the Increase Percentage could not calculate from zero. This was resolved.

8.6 Notifications: Edit Notification

When creating or editing a notification on People Online, the drag and drop text fields were not available. This was corrected.

8.7 Self-Service

8.7.1 Email Notification – Unassigned Approver

When an unassigned approver is setup on the process definition, the approver displayed as a remaining approver on the email notification that was sent out. This was corrected to only show the applicable approvers on the process definition.

8.7.2 Grouped Claims Attachments

On grouped claims only the submitter was able to add an attachment to the workflow. The approver can now also upload attachments in the workflow.

8.7.3 Language Localization

In some cases the setup for language localization for WebSS did not apply. This was corrected.

8.7.4 Leave History

The colour of the headings were changed on the leave history to be readable for the users.

8.7.5 Performance Management comments on competencies and KPAs

The comments specified on the Key Performance Review Codes and Competency Review Codes were not displaying on Self Service, when the user want to view the tool tip. This has been resolved.

8.7.6 Performance Management comments on rating scale

The comments specified on the Key Performance Rating Codes and Competency Rating Codes were not displaying on Self Service, when the user want to view the tool tip. This has been resolved.

8.8 Reports: Beneficiary Payment Report – Reference Number

If the calculation recurrence on a payroll definition is setup to only occur the first N periods, e.g first for weeks of the month, and the user prints the Beneficiary Payment report in week five, the reference number did not print on the report. This was corrected that the reference number will print if there are a payment run amount on the report.

8.9 Security

8.9.1 Object and Field security - ESS Role

View only access can be setup on Personal Details, on certain fields in Self Service, like ID number or Email to prevent employees to submit changes. If a field was setup to view only, the entire screen for personal details were greyed out. The screen layout in WebSS were corrected.

8.9.2 Users (New Copy Current)

When using the New (Copy current) feature while creating new users under security, the user group/s did not save correctly. All user groups available were selected. This was corrected to only copy the selected user group/s from the copied user.

8.10 Africa Statutory Report Filter Query Change

When selecting to print the manual Mozambique Relação Nominal Report, the report does not respond when you have a lot of employees and a lot of payslip data.

The issue was caused by a query in the report base that pulls all the payslip lines. We added a filter on this query to only pull the payslip lines required for the report.

This change only affects the Mozambique Relação Nominal Report and Tanzania P9 P10 PAYE report. This will improve the performance of these reports.