

# Your Sage People Checklist



**Is your HRIS ready for 2024?**

## Top tips to ensure a smooth transition into 2024

Are you on top of your Sage People housekeeping? With the new year fast approaching, now is the ideal time to ensure that your HR system is working optimally. Additionally, you may wish to consider taking advantage of any new solution features and functionality, released but not adopted over the past year.

### WX Self-Service

- Remember to post your Festive and New Year messages on your Employee Self Service or, better still, schedule them to appear/disappear.
- Schedule any annual compliance notices to appear on the Employee Self Service and track which employees have signed the agreement. You can then report on this.
- Consider using WX Reports if you don't already. They can provide managers insights into their team's performance over the last year, including absence, objectives and recognition. WX reports can also ensure that performance is effectively tracked over the coming year.
- Consider setting up and using Pulse surveys to capture employee feedback for an end-of-year engagement check-in.

### Absences

- If you allow team members to carry over all or part of their annual leave entitlement, ensure Absence Accrual Rules are reviewed, and this is configured by the start of 2024. Any changes to an Absence Accrual Rule, such as changes to the Carry Over, require an Absence Accrual record to be added for any team members on the corresponding Absence Accrual Pattern. Failure to do so will result in change applying to past years. Remember to create or extend absence adjustments for 2024 for those who have/require them.
- Check that the "Generate Accrual Balances" batch is set to run, as this is very useful for reporting, especially if the year end Balance needs to be captured for creating Absence Accrual Records. If your system is still using the "Hold Absence Balances" batch, you should ideally move to using Accrual Balances instead, as Absence Balances are no longer supported by Sage People in the event that something were to go wrong.



### Performance

- For those using strategic objectives, remember to edit the strategic objectives picklist to align with the company's 2024 corporate objectives.

### Reports & Dashboards

- Check that Snapshot reporting is working and is scheduled to run in case you need headcount figures as at the end of the year.
- Check date ranges on scheduled reports to ensure they mirror the company's financial year.
- Have you considered making use of the dashboard functionality to report on data such as Diversity and Inclusion (D&I) \*\*, exit data, or even surveys? Data can easily be manipulated, presented in a consistent format, and even automated.

\*\* You can ensure that your HR system is set up to track, monitor and analyse your organisation's D&I data according to best practices, by deploying [the Tool Kit](#) offered by Tugela People.

## Workday Patterns & Public holidays

- ⌚ Check that public holidays (bank holidays) not set as "recurring" are correct for 2024 (and beyond if you have future years).
- ⌚ Increasing/decreasing bank holiday entitlements may affect part-time absence adjustments or accruals, so reviewing these in your org is recommended.
- ⌚ Ensure that any additional, one-off bank holidays that were added for 2023 are not set to recurring.

## Other

- ⌚ Check that Sage People licences for all leavers have been deactivated and review that there are enough licences available for your medium-term requirements.
- ⌚ For those using the Resource Manager, remember your new Active Resource Plan for 2024 to track the budgeted and signed-off new positions.
- ⌚ Update exchange rates if they're updated on an annual basis. Do note, though, that recalculations of salary records will need to happen to take effect, usually via a data load.



## Additional Considerations

- ⌚ If you allowed team members to carry over additional entitlement due to COVID, you may want to review if their carry over period is past due.
- ⌚ [Lightning Experience](#) is the next generation of the Salesforce platform that aims to deliver a new modern user interface and improved navigation.
- ⌚ Take advantage of new Sage People functionality such as Enhanced Objectives. Tugela People offer a Tool Kit to address the need for clients to migrate their existing 'Objectives Process' to the new '[Enhanced Objectives](#)' process.
- ⌚ Have you considered [a system Healthcheck](#)? This service identifies potential improvements and inconsistencies in your system. Our Managed Services consultants can then recommend corrective actions, improving the efficiency and effectiveness of your HRIS, leading to increased user adoption and productivity.

## Migration to People Management Workflow

- ⌚ The legacy HR Request process in the WX self service portal is set to be depreciated in March 2024 and replaced by the People Management Workflow (PMW) process. Sage People recommends migrating to PMW prior to the Y24.1 release in January 2024.
- ⌚ To ensure a smooth and seamless migration to the new PMW interface, take advantage of the Tugela People's Migration from HR Request to [PMW Tool Kit](#).
- ⌚ PMW allows you to split HR Requests out into different types rather than including all fields in one long list. This improves the User experience for managers and minimises the risk of errors. Additionally, this allows for HR Requests to be raised for up to 10 direct reports/cross reports at once.

For additional information or support in making changes or updates to your HRIS, please contact our [Managed Services](#) team on:

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