

2022

sagePeople

checklist



Tugela
PEOPLE

Top tips to ensure a smooth transition into 2022:

With the New Year nearly here, now is an excellent time to make sure that you're on top of your Sage People housekeeping, as well as considering taking advantage of any new Sage People functionality.

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.
- Take advantage of 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.

Performance

For those using strategic objectives, remember to edit the strategic objectives picklist to align with the company's 2022 corporate objectives.



Workday patterns & Public holidays

- Check that public holidays (bank holidays) not set as "reoccurring" are correct for 2022 (and beyond if you have future years).
- An extra bank holiday in the UK has been awarded to mark the Queen's Platinum Jubilee for 2022, so it might be worth:
 - Adding a one-day holiday on 03/06/2022
 - Configuring the late May Spring Bank Holiday to be non-recurring for 31/05/2021 and 02/06/2022, and then recurring thereafter on the last Monday of May.

Absences

- If you are allowing team members to carry over all, or part of, their annual leave entitlement for an additional two years, make sure this is configured and tested by the start of 2022.
- Remember to create or extend absence adjustments for 2022 for those that have them.
- Check that the "Hold Absence Balances" batch is set to run, as this is very useful for reporting.
- Remember to check that Carry Over has been set up on your absence accrual patterns, and ensure that negative carry overs are configured in line with policy.

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 financial year.
- D&I dashboards.
- Vaccination record keeping.

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.
- Those using the Resource Manager, remember your new Active Resource Plan for 2022 to track the budgeted and signed off new positions.
- Update exchange rates if they're updated on an annual basis.
- Return to the office after COVID surveys.



You might also want to consider:

- Are you making the most of the new Time Off features? Time Off unlocks functionalities such as:
 - The Accrual Log - which replaces the Absence Calculator found in the Absence list view on the employment record - is more detailed and includes accrual year filters and FTE values which weren't included on the Absence Calculator
 - Work Schedules
 - Multi-year Accrual Balances
 - Partial Days
 - New Time Off booking UI
- Lightning Experience is the next generation of the Salesforce platform that aims to deliver a new modern user interface and improved navigation. [Find out more.](#)
- Taking advantage of new Sage People functionality such as Enhanced Objectives?
- Have you considered [a Sage People healthcheck](#)? A healthcheck examines any areas of potential improvement or inconsistencies in your system, from which the Tugela People Managed Services consultants can propose corrective actions and suggest enhancements as appropriate. This improves the efficiency and effectiveness of your Sage People system and promotes increased user adoption and productivity.

Help is at hand

For additional information about any of these features or support in making changes or updates, our Managed Services team will be happy to help. Contact us directly on: +44 (0) 1908 030368 or email: info@tugelapeople.com