

2023

sage People
Checklist

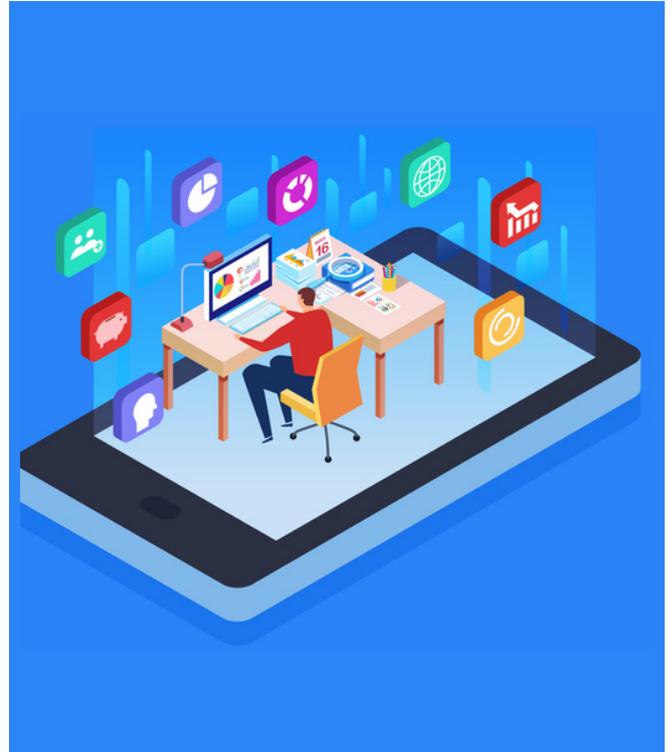


Top tips to ensure a smooth transition into 2023

Are you on top of your Sage People housekeeping? With the new year fast approaching, now is an opportune time to ensure that your HR System is working optimally. In addition, consider taking advantage of any new solution features and 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.
- 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



Workday Patterns & Public holidays

- Check that public holidays (bank holidays) not set as "reoccurring" are correct for 2023 (and beyond if you have future years).
- An extra bank holiday in the UK has been awarded in honour of the coronation of His Majesty King Charles III. You may want to follow the below steps:
 - Go into the relevant Work Day Pattern
 - Add a one-day work day holiday for Monday, 8th May 2023Alternatively, [read the blog containing full details](#)
- Increasing bank holiday entitlements may affect part time absence adjustments or accruals, so reviewing these in your org is recommended.

Performance

- For those using strategic objectives, remember to edit the strategic objectives picklist to align with the company's 2023 corporate objectives.

Absences

- If you allow team members to carry over all or part of their annual leave entitlement for an additional two years, ensure this is configured and tested by the start of 2023.
- Remember to create or extend absence adjustments for 2023 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 and 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 dashboard functionality to report on data such as diversity and inclusion, exit data, or even surveys? Data can easily be manipulated, presented in a consistent format, and even automated.

Other

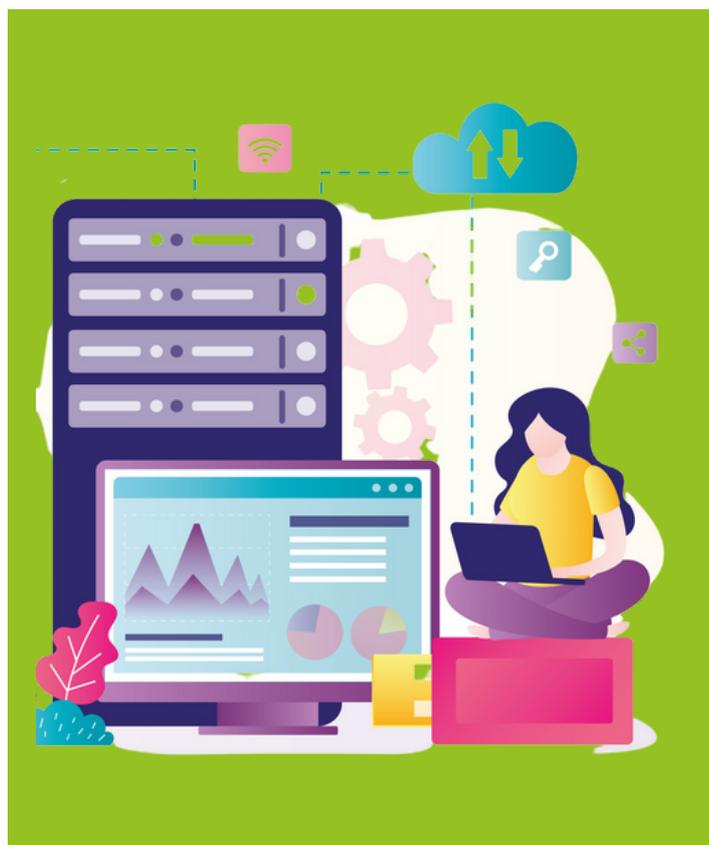
- Check that Sage People licences for all leavers have been deactivated and review that there are enough licences available for your medium-term requirements.
- Those using the Resource Manager, remember your new Active Resource Plan for 2023 to track the budgeted and signed off new positions.
- Update 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

Salesforce Security Requirements and Multi-Factor Authentication (MFA)

- Salesforce Security Requirements and Multi-Factor Authentication (MFA)
- Effective 1st January 2023, Salesforce requires all Sage People customers to deploy heightened security measures surrounding user logins in Production environments.
- Please ensure you have checked the following pages in the Customer Community:
 - Customer Resources
 - MFA Permissions
 - MFA User Experience

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. [Find out more.](#)
- Taking advantage of new Sage People functionality such as Enhanced Objectives.
- Have you considered a [Sage People health check](#)? A health check 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.



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