



Your Sage People Checklist

Is your HRIS ready for 2025?

Are you on top of your Sage People housekeeping?

With the new year fast approaching, now is an the perfect time to ensure that your HR System is working optimally.

In addition, consider taking advantage of any new solution features and functionality.

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Our Top Tips

to ensure a smooth transition into 2025

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 by populating the Start and End Date on the WX Process settings page.
- Schedule any annual compliance notices to appear on the Employee Self Service and track which employees have confirmed the agreement by ticking the "Confirm When Read" checkbox. You can then report on this using a WX Process Confirmations report.
- Consider using WX Reports if you don't already. They can provide managers read only data for their direct report, including an overview of their absences, employment data, and salary.
- 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 2025 (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 2024 are not set to recurring.

Performance

- For those using strategic objectives, remember to edit the strategic objectives picklist to align with the company's 2025 corporate objectives.

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 2025. 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 the change applying to past years. Remember to create or extend absence adjustments for 2025 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.



Other

- ⌚ Check that Sage People User records for all leavers have been deactivated and review that there are enough User licences available for your medium-term requirements.
- ⌚ For those using the Resource Manager, remember your new Active Resource Plan for 2025 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.

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. These could also be used to capture Accrual Balances so you can refer back to balances in the event that a Team Member queries their balance.
- ⌚ Check date ranges on scheduled reports to ensure they mirror the company's financial year.
- ⌚ Review schedule end dates for scheduled reports and reporting Snapshots to check if the end date needs to be extended.
- ⌚ Have you considered making use of the 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.

Additional Considerations



Taking advantage of new Sage People functionality such as Sage People Outlook Integration, WX 2.0, HR Depreciation, Enhanced Domains and Enhanced Performance Reviews.

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.

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

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