SwissSalary Docs

Update 5059.000

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1   Update 5059.000 (xx.xx.2022) | User

1.1   Update 5059.000 | Introduction

Dear SwissSalary Customers,
Dear SwissSalary Partners,

We present to you the manual for SwissSalary Update 5058.000 of 31.10.2021. It also includes documentation on 5058.001hotfixes. Your SwissSalary will be up to date after installing this update. In addition to great new features and improvements in SwissSalary, we have also further developed our bi-directional interfaces to the existing add-ons SwissSalary Direct, SwissSalary EasyRapport, SwissSalary Budget and the latest solution SwissSalary Insights.

We sent out an overview of the most important new features in our newsletter; they can also be found at any time in the magazine on our website at swisssalary.ch.

IMPORTANT NOTES

❑**Basic requirement**
Please make sure that SwissSalary version 5058.000 or newer was installed before this update. If your Dynamics 365 has implemented company-specific changes to your SwissSalary standard objects, you must contact your Dynamics 365 partner prior to installing the objects.
Please make sure that you always work with the latest version. We support the latest and most recent SwissSalary version.

❑**Comprehensive update with all available objects**
The main updates will be released in April/May and October/November similar to the Microsoft Dynamics 365 Business Central release cycle. Each individual version must be installed chronologically. No update versions may be omitted (except hotfixes). The client must be restarted after the installation of each version for the update process to run and the latest version to appear under 'Organization'.

SwissSalary 365 | Microsoft Dynamics 365 Business Central | Microsoft SaaS-Cloud
The SwissSalary 365 app is always up-to-date with the latest versions of Microsoft Dynamics 365 Business Central and SwissSalary. The app is updated with just a few clicks directly via the admin center (see our video tutorial). Starting from the 5057.000 release, the video is also displayed directly in the Role Center under Product Videos).

❑**SwissSalary onPrem | Dynamics 365 Business Central**
SwissSalary Update 5058.000 is available for the following **Business Central** versions (onPrem/private cloud):

o **new** Dynamics 365 Business Central 2021 Wave 2 – version 19 (AL)
o Dynamics 365 Business Central 2021 Wave 1 – version 18 (AL)
o Dynamics 365 Business Central 2020 Wave 2 – version 17 (AL)
o Dynamics 365 Business Central Spring' 19 – version 14 (C/AL)
o Dynamics 365 Business Central Fall' 18 – version 13 (C/AL)

The new 'AL' versions of Dynamics 365 Business Central are controlled by the new Microsoft life cycle concept. We support the latest version. It concerns, for example, the next version 5059.000 to be released in Spring 2022:
o **new** Dynamics 365 Business Central 2022 Wave 2 – version 21 (october 2022)
o Dynamics 365 Business Central 2022 Wave 1 – version 20 (april 2022)

'Dynamics 365 Business Central 2020 Wave 2 – version 17 (AL)' will no longer be supported as of Update 5058.000!
Please update your solution to Business Central 2022 Wave 1 - Version 20 as soon as possible!

❑**SwissSalary onPrem | Dynamics NAV**
SwissSalary Update 5059.000 is available for the following **Dynamics NAV** versions (onPrem/private cloud):
o Dynamics NAV 2018
o Dynamics NAV 2017

o Dynamics NAV 2016*
o Dynamics NAV 2015*
o Dynamics NAV 2013 R2*
o Dynamics NAV 2013*

*Please note that the support for Dynamics NAV versions 2013, 2013 R2, 2015 and 2016 is expected to be discontinued as of SwissSalary Update 5059 (April 2022). Please plan today with your Dynamics 365 partner the upgrade to the latest Business Central version (onPrem/private cloud) or in Microsoft SaaS cloud.

❑**SwissSalary BAU Customers**
Customers using SwissSalary BAU solution receive this update for 'Dynamics 365 Business Central Spring' 19 – version 14 (C/AL)' only. Older versions are no longer supported.

❑**Withholding tax rates, ZIP codes and bank master data, and SwissSalary default permissions (roles)**
Please always stay up to date. SwissSalary regularly publishes the latest rates and master data in SwissSalary Store. This data can be updated via Organization with just one click. Also, you can update now just individual WT rates for a canton.

❑**Role Center**
SwissSalary Role Center | RTC Clients starting from Dynamics NAV 2013 up to Business Central Spring' 19 – version 14 (C/AL)
Since the introduction of the RTC Client, SwissSalary has been using a clearly arranged and intuitive Role Center. System Administrator Manual contains important information thereto.

We hope you will enjoy the latest version of SwissSalary and thank you for the valuable improvement suggestions we could implement for you.

Your SwissSalary Team

1.2 Reports

1.2.1 Payroll Setup Report | NBUV

Task #11141 | 5059.000

The NBUV Employer information was added to the Payroll Setup data report.

1.2.2 Department list report | Department code added

Task #11073 | 5059.000

The department code has been added to be taken into account, for example, during export to Excel.

1.2.3 Age structure report | FTE calculation

Task #11316 | 5059.000

In the Age structure report, the values are now retrieved from the Pay process list (SwS Payroll Head) instead of from the Employee list.
Recorded values are taken into account so that the statistics is more meaningful.

1.2.4 General Report | Sorting by text

Task #11230 | 5059.000

The list of reports is now sorted by name (the Text column). This sorting is saved for the next retrieval.

1.2.5 Social fund annual statement | Annual Wage

Task #11053 | 5058.001

With SwissSalary 5058.000, the social fund annual statement has displayed wage values for a month in-stead of annual wages. This has been fixed.

1.2.6 Short letter | Address in the envelope

Task #10768 | 5059.000

The short letter has been adjusted so that the layout behaves equally with and without an image (logo).
For the printed version of the report, it is checked to ensure that the address fits in the envelope window. It is crucial here that the short letter is printed as a PDF or physically, the "preview" behaves differently.

1.2.7 Reports | Client name display

Task #10455 | 5059.000

The value in reports comes from the Company Information table. It also works for the FIBU posting journal and other reports now.

1.3 Swissdec 5.0

1.3.1 Swissdec 5.0 | XML submission for cross-border workers

Task #10143 | 5059.000

For submission via ELM according to Swissdec Standard 5.0, additional data must be transmitted for Italian cross-border workers. The fields on the Employee card are already created. The scheme has now been expanded accordingly and with the changeover to Swissdec 5.0 transmission, the recorded data will be taken into account for submission.

1.3.2 Swissdec Setup | SUA certificate

Task #11076 | 5059.000

The Swissdec settings can be found via "Search". The "Get SUA certificate" action has been moved from the "General" action group to "SUA". The "Contact person" field was moved from the "Swissdec Setup" tab to the "SUA" tab. A new field "SUA Contract Code" has been implemented in the SUA tab.

1.3.3 SwissSalary contacts | New table

Task #11310 | 5059.000

A new table "SwissSalary contacts" was created with this task and all references pointing to the Microsoft Standard Contact table were adjusted.
The table relations now point to the SwissSalary Contact table.
This task makes us independent from Microsoft and we can easily create more contact fields in the future.

With the update process, the old contact records are automatically transferred to the new SwissSalary Contact table.

1.4 Inerfaces

1.4.1 Payroll Setup | FIBU Interface

Task #11143 | 5059.000

The terms in the Payroll Setup have been revised and the previous names for FIBU interfaces have been adjusted:

Old:	New:
Dynamics NAV	Dynamics 365 BC / NAV
Dynamics 365 (AX)	Dynamics 365 Finance / AX

The name for the domain settings has also been adjusted:

Old:	New:
SAP settings	SAP Business byDesign

1.4.2 Payroll Setup | Statistics LSE

Task #10014 | 5059.000

We have renamed the heading "Wage structure survey (LSE)" and the two fields "LSE wage agreement" and "LSE ELM" in tab "General" of the payroll master data.

Old:	New:
Wage structure survey (LSE) header	Statistics (Message)
Field LSE wage agreement	Salary Settlement
Field LSE ELM	Statistic ELM

1.4.3 SmartPort | WebService

Task #9759 | 5059.000

Leading HR systems can now deliver data to SmartPort via a web service. This way it can be written to SwissSalary under control (Link SmartPort).

A code unit was created for this purpose in the web services:
- Object ID: 3049361
- Object name: SwS SmartPort Api
- Service name: SwSSmartPort
- addressed as ODataV4 Unbound Action

- Versions of BC 17 and older
- SOAP technology should still be used here.
- The web service is not released automatically.
- An entry must be created in "Web services".

1.4.4 SmartPort | Department Manager permissions

Task #11081 | 5058.001

Two new FlowFields were created for the Smartport Change and Smartport Posted Change table (Payroll Area and Department).
In addition to the new fields, the call to filter the SmartPort data correctly has been implemented on the various pages.
With these changes, a department manager only sees the changes of the assigned employees in the Smartport.

1.4.5 Statistic | Hospital Statistics

Task #11312 | 5059.000

A statistics group has been added to hospital statistics, which makes it possible to exclude individual employees from the statistics (e.g. BM).

1.4.6   SAP Interface extension (VAT product posting group)

Task #11112 | 5058.001

A new field has been added to the SAP Setup page called "VAT Export". As soon as this field is activated, the VAT product posting group is retrieved from the Fibu account and included in the file.

1.4.7   SAP by Design | Dimensions

Task #11202 | 5059.000

If the "Synchronize employee dimensions" field is deactivated in the SAP interface settings, the dimensions are not written to SwissSalary.

1.4.8   SAP Business by Design | Time type mapping

Task #11302 | 5059.000

During "SAP time type mapping" setup, time types that do not need to be sent to SwissSalary can now be ignored.
In addition, a file is also written to the files during wage posting.

1.4.9   SAP FIBU interface | Provisions and reversals

Task #11157 | 5059.000

With the SAP (Excel) interface, provisions and provision reversals are now also possible. Provision reversal is contained in a separate file.

1.4.10   SOMED V2.7 Personnel statistics | Custom report and request page

Task #11255 | 5059.000

We have adapted the SOMED interface (statistics for social and medical institutions of the FSO) according to the latest required version 2.7.

1.4.11   Open interface | Social security number

Task #10971 | 5059.000

It is now also possible with the open interface to import data into a journal using the social security number instead of the personnel number. To do this, select Social insurance in field No. 1 during open interface setup. If there are several employees with the same social security number, SwissSalary will automatically inform you after the import about the corresponding number of employees found with the same social security number.

Other open interface settings are not changed. Open interface is only available with the PLUS license.

1.5 KLE

1.5.1 KLE | Filter function in the overview

Task #10570 | 5059.000

Filter function has been enhanced. The criteria below are available in the KLE overview:
- Function
- Department
- Allocation Group
- Place of work
- Working Group

1.5.2 KLE | Date of birth

Task #11139 | 5059.000

The date of birth has been added to the KLE case details.

1.5.3 KLE | Case reactivation

Task #10881 | 5058.001

A closed case is moved to the "closed" cases with the 'Communication stopped' status. If the case is reactivated by the insurer, the case status changes back to "reported" and can therefore be processed again.

1.5.4 KLE | Daily allowance statement

Task #11011 | 5059.000

An additional column (product category) with information on daily allowance reductions was added to the daily allowance statement.

1.5.5 KLE | UVG claim reporting

Task #11079 | 5059.000

The Employee number was added to the Claim report. The text entered in the description of facts is printed in full and is no longer trimmed.
Displaying and hiding wage data works perfectly.

1.5.6 KLE | Start date on re-recruitment

Task #11101 | 5059.000

For employees who were re-recruited within 12 months, the wrong start date was used to calculate total wages. This is now fixed.

1.5.7   KLE | Incapacity to perform duties

Task #11399 | 5059.000

In the KLE section, a new text field for internal description has been added and a new fact box for incapacity to perform duties has been added to the KLE Case list and KLE Case card.

1.5.8   KLE | Direct Interface with SmartPort

Task #10882 | 5059.000

Accident claim can now also be recorded by the person involved in the accident via the SwissSalary Direct access and synchronized in SwissSalary via SmartPort. As usual in SwissSalary Direct, it can be recorded via smartphone, tablet or another device. SUVA accident insurance is currently a prerequisite. The report can then be processed as a KLE case in SwissSalary and submitted to the insurer.

This is another big step towards the completely digital and paperless processing of accident reports.

For more information on this, please refer to the SwissSalary Direct manual.

1.5.9   KLE | Direct document type

Task #11351 | 5059.000

These file types can be synchronized between KLE and SwissSalary Direct: png, jpg, jpeg and pdf
This is particularly important when working with the Modern Client (browser).

1.6   Budget

1.6.1   Report 3065046 | Search function access

Task #11173 | 5059.000

With update 5058.001, the "Import Salary/Raise Salary" function was renamed to "Rise Salary budget". However, the previous name was still available in the Suite menu and the function could therefore only be found via the search with the previous term "Import Salary / Raise Salary". We have now corrected this.

1.6.2   Report 3065046 | Allocated Salary are also transferred

Task #11119 | 5058.001

The "Wage parts filter" field is now available during the processing of "Import Salary/Raise Salary". This field is used to enter salary types that are to be transferred to the budget in addition to the wage. This field is used to enter the usual filters (e.g. 4700|4701|4702 or 4700..4702). If the processing is started, wage parts amounts are transferred from SwissSalary to the budget. The "Valid from" and "Valid until" fields of Allocated salary are taken into account. The "Recruitment/resignation calculation" setup of the salary type is also taken into account. Note: In the column layout, the "editable" check box must be set in the row in which the corresponding wage type(s) is entered in the "Salary type filter" field.

1.6.3 Budget | Structure and Matrix fields

Task #11397 | 5059.000

Additional fields for evaluations have been added to the Budget Structure and Budget Matrix pages.
The newly added fields are not displayed by default. The user must unhide them first.

1.6.4 Budget | Posting group text

Task #11323 | 5059.000

The description of the posting group in vacancies in SwissSalary Budget was not displayed correctly. This is now fixed.

1.7 Administration

1.7.1 Payroll Setup | BUR Number

Task #11064 | 5059.000

The BUR number changes with Swissdec version 5.0 and can now also contain alphanumeric values. In addition, the length has been extended from 8 to 9 characters.
It is now possible with this adjustment to store this new number in SwissSalary in the Workplace table.

To do this, you must first switch from ELM version 4.0 to 5.0 in Swissdec settings.
The last digit of the new BUR number has also been implemented as a check digit.

1.7.2 Payroll Setup | Insurance validity

Task #11319 | 5059.000

The "Valid from" field is now available in Insurance contracts (Payroll Setup). This date is required for the implementation of Swissdec 5.0. We will deliver the functionality for this field in a subsequent SwissSalary update.

1.7.3 Payroll Setup | ELM V5.0

Task #11026 | 5059.000

The two tests for the submission of wage data via ELM (ping and interoperability) have been adapted to the latest Swissdec version 5.0. Web API must be activated for this. You can add and activate this field as an Info tab in the Payroll Setup. You can switch from version 4.0 to 5.0 in the Swissdec settings. For more detailed information on this please see other sections.

1.7.4 Absence Claim | Calculation of holidays

Task #10476 | 5059.000

If a month other than January is indicated in the Refunding of absences under the claim calculation month, this month counts as the start for the holiday entitlement.

This function is required above all for apprentices whose employment year starts in August and ends in July of the following year.

1.7.5   Allocation Group | Inerface fields

Task #11135 | 5059.000

The finance interface fields have been removed from the Payroll Setup and copied to the Allocation Group. During the update, the data is automatically copied to the Payroll area table (same content for all payroll areas)

Users now have the option of storing a different financial interface or a different company number for each payroll area.
The company number field in the Payroll Setup is still used for all other interfaces (e.g. UKA and PEKA).

1.7.6   Allocation Group | Payslip image

Task #11134 | 5059.000

The company logo, which appears on the payslip, for example, is now no longer stored in the payroll master data but in the payroll areas. If a logo is already stored, it will be transferred to all payroll areas during the update process.

1.7.7   Place of work | Sessions

Task #11346 | 5059.000

A decimal value can be entered for the workplace in the Weekly working time in sessions field.

1.7.8   Department | Validity

Task #11075 | 5059.000

The Valid from and Valid until fields can be displayed now, so it is clear whether the department is still active or not.

1.7.9   Working Group | Balance posting when setting week or day

Task #11155 | 5058.001

Starting from update 5058, during the calculation of balance posting when set to week or day, the target time of the month was compared to the actual time of the day or week, which led to the calculation of minus hours in error. This has been fixed.

1.7.10   Regulation Fiscal Administration | Expat ruling

Task #11349 | 5059.000

Approved expat ruling can be added to the selection. Employees are assigned via the Employee card.
The Wage statement tab on the Employee card has been supplemented with the Expat ruling option. If an expat ruling has been approved by the relevant canton, it can be assigned to employees. The expat ruling is indicated under para. 15 on the wage statement.

1.7.11 Company Group | Cross synchronization

Task #11315 | 5059.000

The Salary type group field in the Settings area in the Payroll Setup has been replaced by the Client group field, which can also be found in the Settings area of the Payroll Setup. If a client group is selected, e.g. salary types in the case of an adjustment in one client are also adjusted automatically in all other clients with the same client group.

1.7.12 Swissdec Setup | Delegate

Task #11311 | 5059.000

The "Delegate" field formerly was in the "KLE Setup" tab (Payroll Setup, Swissdec Setup). We have now moved this field to the "Swissdec Setup" tab, because this field is required in exceptional cases both for KLE reports and for ELM reports.

Excerpt from the Swissdec guidelines on substitution:
The Delegate is a third party commissioned by the company (e.g. trustee, broker, etc.) who submits incident reports on behalf of the company via a Swissdec-certified system and, depending on the order and agreement with the company, serves as a contact person for all matters related to the incident.

1.7.13 ZIP file folder import | Label

Task #11288 | 5059.000

During ZIP file folder import, the .PDF label (capitalized) is now also accepted in addition to label .pdf.
For example, Personnel_Number_Label.PDF (1234_Report_Card.PDF)

1.7.14 Income tax rates | No import for rates D, E, G and Q

Task #11332 | 5059.000

Up until now, rates D, E, G and Q were also imported during the import of IT rates. These three rates never have to be used in SwissSalary. They are used, for example, by compensation offices (e.g., in the canton of GE, if child allowances are paid directly to employees). Since the rate had been previously imported, rates D, E, G and Q were available for selection on the personnel master data if, for example, no IT canton had yet been entered.

These three rates are now no longer imported into the IT rate table and are therefore no longer available for selection in the personnel master data as soon as the outdated rates have been deleted.

1.8 Payroll

1.8.1 Get EasyRapport Entry | Tooltip

Task #11284 | 5059.000

A tooltip was added to "Only post adjusted" for the EasyRapport Get items function:
It indicates that only approved entries are transferred to the journal. Postings that have not been approved permanently remain in the import journal.

1.8.2 Pay process | Workgroup time compensation

Task #11262 | 5059.000

If monthly and weekly limits were to be taken into account in the workgroup time balance, too many hours were shown for weeks. We were able to fix this.

1.8.3 Pay process details Factbox | More data added

Task #11012 | 5059.000

The Posted by and Posted on data is now displayed in the Factbox.

1.8.4 Pay process | Reset reversal lock

Task #9873 | 5059.000

The reversal lock can now be reset in pay processes via actions. This means that the reversal lock for a pay process can be removed if the ISO file has already been generated for the pay process but it has not yet been posted.
It is necessary to confirm the relevant message.

1.8.5 Post Payroll | Proposed pay process

Task #10907 | 5059.000

During the posting or canceling of salarys, the top pay process and not the one selected in the list was proposed. This has now been optimized.

1.8.6 Target time calculation | Payment after resignation

Task #11362 | 5059.000

In the case of an additional payment after resignation, work calendar was also taken into account during the 'Period Start Day 1' accounting. This means that target hours and therefore also minus hours were posted for the employee.
This trouble has now been corrected. Work calendar is no longer taken into account in the event of an additional payment after resignation from the company.

1.9 Modern Client

1.9.1 SwissSalary User settings | Renaming

Task #11295 | 5059.000

The name of the SwissSalary user table has been changed, and it is now called "SwissSalary user settings". SwissSalary user settings are also clearly identified in the search.

1.9.2   Employee Dossier | Insert document

Task #11326 | 5059.000

In SwissSalary 365 (cloud), documents can be uploaded directly to the Employee Dossier using drag and drop. To do this, open the corresponding file, select document type, click "Import" at the top and then drag the document with the mouse onto the button in the file. The "+ Copy" sign will appear, drag the document there. It is now automatically uploaded directly to the file without intermediate storage. This can be done, for example, from Outlook or Explorer.

1.9.3   Cloud Connector | User

Task #10747 | 5059.000

With release 5059.000, a SwissSalary update will be available for some versions for the last time. The sup-ported versions are listed in each case on our website or in the relevant chapter of this manual.

Cloud Connector presents the option of using SwissSalary in the cloud while still managing financial accounting in the existing Navision version. Financial accounting values, for example, are transferred to financial accounting via Cloud Connector and can be posted there without much entry operations.

A separate user (Essential User) is created to use Cloud Connector. During wage posting, the values are transferred to the financial accounting recording journal via Cloud Connector.
The Cloud Connector option is created in the payroll master data settings for the FIBU posting field. This selection is also available for project and KORE posting.

1.9.4   Cloud Connector | FIBU recording journal rows i onprem environment

Task #11104 | 5059.000

Cloud Connector enables FIBU recording journal rows transfer to an onPrem environment when posting pay process. If the FIBU recording journal rows of the previous pay process have not yet been definitively posted, pay process posting in the cloud is canceled and a corresponding error message appears. Journal rows must first be posted to financial accounting before the pay process can be posted to the cloud.

1.9.5   Salary declaration from the Cloud | AHV insurance certificate

Task #11070 | 5059.000

Reporting on new employees can be submitted to the compensation office via EMA Salary declaration. The proof of insurance can then be processed directly in SwissSalary.
It displayed differently when created in the cloud. This has been optimized and the proof of insurance can now be created in such a way that it can be handed over to employees.

1.9.6   Cloud Reports | Shor and Cover letter

Task #11057 | 5059.000

Place and date display has been adjusted for both short and cover letter. The place is now listed correctly in front of the date.

1.9.7 SwissSalary Users | Trustee

Task #11145 | 5059.000

A customization was developed for trustees with numerous clients, which allows the entry of a user for all clients. This customer-specific adjustment can be activated for all cloud customers on request so that a user only has to be entered once. The payroll area is automatically set to "empty". Existing entries will not be adjusted and no entries will be deleted.

1.9.8 Initialization file | Tenant registration validation

Task #11200 | 5059.000

It is checked again in the SaaS version of SwissSalary 365 whether tenant registration was completed.
If the tenant registration is not yet complete and the user tries to import the system initialization file anyway, the user will again receive an error message. The initialization file must not be imported for SwissSalary 365 customers. This happens automatically during setup.

The error message is:
- Tenant registration is not yet complete.
- System initialization cannot be performed.

1.10 Employee

1.10.1 Employee Card | TimeMachine

Task #9576 | 5059.000

The TimeMachine structure has been completely revised. You can now see during entry which other fields are affected.
For example, when entering a new place of residence for an employee with a IT obligation, all fields that are automatically adjusted by this entry are listed.

The processed values are displayed in the TimeMachine History factbox, which you can show directly in the top right corner of TimeMachine. Activate this factbox via the i-symbol and the values will be displayed. As before, you can choose whether you want to see the complete history or only the changes.

1.10.2 Employee Card | Work Permit

Task #11299 | 5059.000
Task #11331 | 5059.000

The selection options for Work permits have been adjusted in accordance with Swissdec 5.0 guidelines.
A new distinction is made between 90 and 120 days in the notification procedure. There is an "Other" option and additional label EU/EFTA is not used.

1.10.3 Employee Card | ZAR No. removed

Task #11260 | 5059.000

The "ZAR No." field was provided in the Employee card in tab "Job". This ZAR No. has been replaced by the SIMIC No.
At the very latest since the introduction of the new residence permit, this number no longer has any meaning. The field is therefore hidden.

1.10.4 Employee Card | Incapacity to perform duties without degrees

Task #11003 | 5059.000

The progressive IV pension system was introduced on January 1, 2022. Disability degrees are now graded based on percentage. This change applies both to AHV and IV disability pensions and to mandatory pension fund premium.

1.10.5 Employee Card | Semi Families

Task #9933 | 5059.000

Information about single-parent family is required on the Empoyee card for the correct submission of the IT report.
If Yes is selected for common-law spouse in the Private tab, the selection in the Single families field can be supplemented.

1.10.6 Employee Card | Private common-law spouse

Task #9935 | 5059.000

The choice "unknown" for common-law spouse was replaced with "no" due to the Swissdec 5.0 specifications.

1.10.7 Employee Card | Employment relationship statistics

Task #11338 | 5059.000

The "Employment relationship" field in the Employee Card, tab "Statistics" has been expanded to include options "Public administration" and "Loaned staff".

Excerpt from the Swissdec guidelines on loaned staff:
The identification allows the leased personnel to be clearly identified. This information is only required for companies that provide personnel (temporary agencies). This way, the leased personnel is distinguished from the temporary agency's own internal personnel. Reports on persons leased by temporary agencies must be submitted by these agencies and not by companies they work for (companies using services).

Excerpt from the Swissdec guidelines on public administration:
Identification, which allows clear identification of permanent personnel in public administrations. It is only required for public administrations (municipalities, cities, districts, cantons, federal government, ...) and churches. Permanent personnel is thus distinguished from the many clients (auditors, interpreters, etc.) that do not belong to permanent personnel.

1.10.8 Employee Card | Employment contract statistics

Task #11348 | 5059.000

This task implements a requirement from Swissdec 5.0 for wage payment with no time limitation.
An additional option was implemented under the "Statistics" menu item of the Personnel card in the
"Employment contract" field --> "Board of Directors"

1.10.9   Employee Card | Education Statistic

Task #10015 | 5059.000

We have expanded the "Education" field in the "Statistics" tab of the Employee card with two selections.
- Higher vocational education Master
- Higher vocational education Bachelor

1.10.10   Employee Card | Education Statistic

Task #11056 | 5059.000

The translation of University was corrected.

1.10.11   Employee Card | Working Time Type statistic

Task #11320 | 5059.000

There is a new "Working time Type" field in the "Statistics" tab of the Employee card. This field is used to report
statistics via ELM. You must select in this field whether a regular or irregular employment relationship has been
agreed with the person.

1.10.12   Employee Card | Salary certificate, private share of company car deduction

Task #11110 | 5059.000

Starting from January 2022, private use of the company car will be calculated at 0.9% instead of the old 0.8%.
We have removed the % value on the Employee card in the Tax declaration tab.
For the time being, there will be no text adjustment on the Salary statement, only so that Salary certificate for
2021 can be completed. The text on the Salary certificate says "at least 0.8%", which still meets the higher rate.

1.10.13   Employee Card | Salary certificate Expat ruling

Task #11350 | 5059.000

The Tax Declaration tab on the Employee card has been supplemented with the Expat ruling option. If an
expat ruling has been approved by the relevant canton, it can be assigned to employees. The expat ruling is
indicated under para. 15 on the Salary certificate.

1.10.14   SwissSalary Direct registration Code | Prevent from being printed for employees

Task #10238 | 5059.000

It is now possible to set the "Electronic delivery" field to "empty" for an employee so that the QR code including the registration code text is no longer printed on the payslip.
The verification is run via the "Pay process header table" table, i.e. with the status of how the pay process was settled.

1.10.15 Employee Factbox | New Infoboxes

Task #11055 | 5059.000

Additional infoboxes for relatives, alternative addresses and the supervisor can now be displayed in the Employee list and in the Employee card.

1.10.16 Employee List | Display of current dimension value

Task #1604 | 5059.000

Personnel dimension information can be displayed in the Employee list. However, up until now the oldest data record of the Employee dimension has been displayed, regardless of any validity stored.
The validity of personnel dimension is now taken into account and the currently valid value is displayed.

1.10.17 Employee children | Retroactive calculation

Task #11032 | 5059.000

With update 5058.000, automated retroactive calculation of family allowances was introduced. It also calculated child allowances for additional pay processes. This error is corrected.

1.10.18 Employee Bank | QR Invoice

Task #10948 | 5059.000

Starting from October 2022, QR invoices will be mandatory in Switzerland. Previously, the QR IBAN primarily has been used by debt collection offices. This task enabled the selection of the QR invoice payment type in the Employee bank card and the input of the QR IBAN and QR reference. The payment order features the detailed payment with the "QR IBAN" note and the QR IBAN itself.

1.10.19 Employee Dimension | Dimension Cost Center

Task #11061 | 5059.000

When a personnel dimension was retrieved, the dimension stored in financial accounting was no longer suggested. This has been corrected and the required dimension is now displayed by default.

1.10.20 Employee Payroll List | Residence permit

Task #11237 | 5059.000

The selection options for residence permits in the pay process list are now identical to those on the Employee card.

1.10.21 Employee career | Data Import

Task #10973 | 5059.000

In Career, you now have the option of importing individual data fields (Activities, Evaluations, etc.) directly via Excel import.

How do you go about this?
- Under Employee/Related/Human resources/Career/Reports --> Career from Excel
- Select the saved Excel file in the 'Excel import file' field. The system checks the Excel file and automatically writes the number of rows it was able to read from it into the From row/To row field.
- Under Column settings, link the desired columns to the relevant Excel file (column letter).
- By clicking OK, the data is imported into Career.

Options:
Rolling spacing / Rolling quantity (note this section under "Journal rows from Excel" or "Wage items from Excel")

1.10.22 Employee | Social security control

Task #10309 | 5059.000

With a large number of different social insurances, an error message previously appeared in the matrix view. A function has now been built in here so that the matrix view works perfectly even with a large number.

1.10.23 Employee | Department label

Task #9530 | 5059.000

Up until now, only the associated code could be displayed for the department in the Personnel view.
The department label is now available as a column in the Personnel view and can be selected as a selection field on the Personnel list report.
Translation is impossible because it is a sub-table. The labels are therefore always taken from the table.

1.10.24 Personnel file | Export files

Task #11354 | 5059.000

Multiple documents can be selected and exported together.

1.10.25 Personnel file | Edit document

Task #11313 | 5059.000

An error occurred during the processing of multiple form letters in the personnel file. This has now been corrected.

1.10.26   Employee card | Italian cross-border workers

Task #10142 | 5059.000

Following the 2021 withholding tax requirements, mandatory fields have been added for cross-border workers from Italy.
If WT rates R, S, T, U and F are selected, the input prompt below appears for filling in the fields:

- Birthplace
- Tax ID country of residence
- Immigrating Date

1.10.27   Employee template | Working Time type

Task #11321 | 5059.000

The new "Working time type" field has been added to the templates for registering new employees. The default value is "Regular".

1.10.28   Employee | History report

Task #11014 | 5059.000

Up until now, only mutations in the Employee card were displayed in the History report, a new entry was hidden. The new entry is also included in the report.

1.11   EasyRapport

1.11.1   EasyRapport SumRange field length extended from 30 to 100 characters

Task #11168 | 5058.001

It is possible for the "Break Deduction" report type to automatically put all daily report types together in a filter and transfer them to EasyRapport. The SumRange field in EasyRapport is used for this. The transfer to the SumRange field has now been extended from 30 to 100 characters as soon as the Break Deduction report type is used.

1.11.2   EasyRapport | Holiday balance as of January 1

Task #11271 | 5059.000

On January 1 of each year, SwissSalary EasyRapport displays holiday balance from the corresponding refunding of absences of each employee.
SwissSalary now takes into account the dates of resignation that have already been set and reduces the displayed holiday balance pro rata.

1.11.3   EasyRapport | Min/Max for Group title

Task #9654 | 5059.000

A maximum threshold can now be entered for the group title. For example, if a maximum of 6 hours is entered in the 'Absences' line, only a maximum of 6 hours can be recorded across all absences.
It is impossible to set a minimum for a group title. However, the column is displayed in the EasyRapport groups settings, because it can still be used for Group Lines.

1.11.4 EasyRapport | Report types of fixed dimensions

Task #9805 | 5059.000

Columns 'CC Debit', 'CU Debit', 'Project Task' or 'Project No.' are displayed in the EasyRapport groups.
They are used so that a dimension can be assigned directly to a group line with the 'row' report type and therefore only it can be reported.

1.11.5 EasyRapport Group | Fields expanded

Task #10800 | 5059.000

The fields below are no longer available in the SwS EasyRapport Group table:
- Email field (50)
- Group Manager field (30)

1.11.6 EasyRapport | Flextime update

Task #11103 | 5059.000

Selection field to choose whether over- and undertime in the EasyRapport is fed to Overtime hours or Flextime hours. The selection leads to the total over- and undertime being fed to either overtime or flextime. The conversion is only effected after the import into SwissSalary.

1.12 SwissSalary Direct

1.12.1 SwissSalary Direct | Synchronization of locked clients

Task #11029 | 5059.000

If a client is in maintenance mode in SwissSalary Direct, employees can no longer log in. It was also introduced that a client in maintenance mode cannot be synchronized with SwissSalary. If a synchronization is attempted, a corresponding error message appears with a reference to the set maintenance mode.
You can set the maintenance mode with the admin access in SwissSalary Direct in the client settings. No setup is required in SwissSalary.

1.12.2 Smart Port | Accept rejection in SwissSalary Direct

Task #11068 | 5059.000

If employees make changes to their addresses or bank details in SwissSalary Direct, they are transferred to Business Central as a SmartPort change. The change can now be accepted or rejected in SwissSalary. If the change is rejected, the old address/bank status is sent back to SwissSalary Direct and displayed to the employee.

1.12.3   SwissSalary Direct | Send document

Task #11167 | 5059.000

It is determined for resigned employees for how long they will be granted access to SwissSalary Direct. This grace period is now checked using the Send document function and the document is not sent to employees who no longer have access due to their resignation.

There are other tasks to extend this check to the uploading of wage statements.

1.13   SwissSalary NSP

1.13.1   NSP | Filter for Wage accounting

Task #11028 | 5059.000

If a double filter was set to the payroll area when calculating wages, employees who had already resigned were settled. This bug has been fixed.

1.13.2   NSP personnel position | Validity change

Task #11117 | 5059.000

When the validity of a main office was changed, it was corrected so that the amount on account is calculated and paid out correctly.

1.13.3   NSP | Gender in EasyRapport

Task #10624 | 5059.000

The "Send additional employee data" field in the EasyRapport settings displayed "m" by default in the "Employee" area in the Gender column of EasyRapport, regardless of the settings in the Personnel card. This bug was fixed by upgrading the field. The gender selected in the Personnel card is now displayed in the "Employee" area in EasyRapport.

1.14   Technical Partner and Customer information

1.14.1   Tenant initialization | Bank

Task #11328 | 5059.000

If the company data was entered during the opening of a new client using the wizard, an error message appeared during the input of bank data if the company name was longer than 30 characters. This bug has been fixed.

1.14.2   Obsolete objects | UVG Cost Center

Task #11306 | 5059.000

The "SwS UVG Cost Centre" table and the "SwS UVG Cost Centre" page exist, but are not used anywhere.

Therefore, they have been emptied and expanded with this update.

1.14.3 Departement Manager Access | Pay Process header filter

Task #11060 | 5058.001

A department manager with access to SwissSalary was able to remove the table filter. This has been fixed and the user can no longer remove the filter.
The "SwS Payroll Head" page does not display any values to the department manager; wage items for the assigned employees must be retrieved via "Salary types" --> "Wage items".

1.14.4 Departement Manger Access | Settings for departement incomplete

Task #11054 | 5059.000

Persons managing a department, for example, can be granted access to the data of employees who belong to the relevant department in SwissSalary. For this purpose, among other things, settings for SwissSalary users and department supervisors must be adjusted. If the settings were available in SwissSalary Users, but the supervisor was not assigned to a department, unfortunately the entire Employee data could be viewed. We have now adjusted this. Absolutely no data from the personnel master data is now displayed if the settings were not adjusted by a department manager.

1.14.5 Demo base data | Cross-client Tables

Task #11059 | 5058.001

The "Generate demo master data" function may only be executed in a test database or in a sandbox. If this function is executed in a production database, there is a risk that the cross-client tables (e.g. functions, time types) setup will be changed.
Cross-client table, for example "Time types" is not completely deleted and created anew.
Only time types defined in the SysInit file are added or edited.
New time types entered by the user remain.

1.14.6 Demo base data | 10 Demo Employees with picture

Task #11165 | 5059.000

This task affects SwissSalary onPrem and our SwissSalary 365 SaaS cloud customers (currently no support for SwissSalary BAU and SwissSalary NSP).

Demo master data can be created via Organization. It is primarily intended for our partners for provision of demo environment as quickly as possible.

IMPORTANT:
This feature can only be used if there is no setup data in other modules either. If this feature is used, all existing SwissSalary settings and some settings in other modules (Financial accounting, Projects, etc.) are deleted beforehand. That is why SwissSalary checks whether setup data is already available.
If this is the case, an error message appears and processing is aborted. This way we ensure that the function is not accidentally executed in a 'wrong client'. If there are customer-specific developments with access to SwissSalary standard objects, these individual functions are not taken into account.

Up until now, demo employees generated automatically had no pictures assigned. Pictures are now also created for these employees.

1.14.7   Demo master data | Payslip logo

Task #11317 | 5059.000

This task affects SwissSalary onPrem and our SwissSalary 365 SaaS cloud customers (currently no support for SwissSalary BAU and SwissSalary NSP).

Demo master data can be created via "Organization". It is primarily intended for our partners for provision of demo environment as quickly as possible.

IMPORTANT:
This feature can only be used if there is no setup data in other modules either. If this feature is used, all existing SwissSalary settings and some settings in other modules (Financial accounting, Projects, etc.) are deleted beforehand. That is why SwissSalary checks whether setup data is already available.
If this is the case, an error message appears and processing is aborted. This way we ensure that the function is not accidentally executed in a 'wrong client'. If there are customer-specific developments with access to SwissSalary standard objects, these individual functions are not taken into account.

Demo master data can be generated during new client registration, and a new logo appears on the payslip.

1.14.8   Demo base data | Entries in SWS Budget

Task #11150 | 5059.000

The budget structure rows are also created using the "Generate demo base data" function. Budget structure row dimensions have not yet been created. Now, they are also generated. We would like to point out once again that this function should only be executed by partners.

1.14.9   New permission | SWS-SETUP-LIGHT

Task #11227 | 5059.000

The situation can arise that a user can adjust all the settings (payroll master data, payroll areas, etc.) in SwissSalary, but s/he is not allowed to make any changes to SwissSalary users. For example, these users only have access to certain payroll areas. A new authorization set SWS-SETUP-LIGHT will be delivered for this with SwissSalary Update 5059.000. This permissions set has the same 1:1 access privileges as in the SWS-SETUP permissions sets. The only exception is that there is no direct permission for the "SwissSalary User" table (3009102) in SWS-SETUP-LIGHT.

2 Update 5059.000 (xx.xx.2022) | Systemadmin

2.1 SwissSalary-Homepage | Objects and app download

I work in SaaS cloud from Microsoft Dynamics 365 Business Central (online). Do I have to download the objects from the website and install?

No.
You will only find on our website the objects and apps for the installed versions (onPremise). You can update your app directly within the SaaS solution.
We continuously check customer-specific adjustments (so-called PTE, per-tenant extensions) before each update. They should be available as usual without any further steps at your end, even after the update, and you do not need to update them.

How is SwissSalary customer area accessed (SwissSalary onPrem customers and partners only)?

Go to our website at https://swisssalary.ch Click Login at the top right.

Log in using your company-specific login data (email). Then click the Update NAV button (SwissSalary BC/NAV customers) or the Update BAU button (SwissSalary BAU customers).

You will be offered the latest Updates and Hotfixes for download (SwissSalary onPrem).

Which documents can you additionally download?

In addition to the latest Update, the latest Hotfixes (if any) can be downloaded and installed in SwissSalary. This way, your object status will always be up to date (recommended).

The library of current manuals and further information about SwissSalary is constantly updated, expanded and published at https://docs.swisssalary.ch.

How is a file downloaded from the Internet?

Click the corresponding icon with your mouse and the download starts (you will find the file under "Downloads"):

Will I be informed about improvements to SwissSalary?

We use different communication channels, e.g. Yammer (SwissSalary Partner Network), via newsletters, website and via news in the Role Center.

Do you have questions about our website or downloading?

Please contact your Dynamics 365 partner, email us at support@swisssalary.ch or call our hotline +41 (0)31 / 950 07 77. We will be pleased to advise you!

2.2 Importing/updating Updates and Hotfixes

These explanations only concern customers with installed versions (onPremise).

1. Download the objects according to the descriptions in the previous chapter.

IMPORTANT NOTES:
❑ The User Manual can be found at https://docs.swisssalary.ch.
❑ Make sure that update version B5057.000 (BAU) / N5057.000 (BC/NAV) or later is installed on your system. Check this in SwissSalary in RTC client under Role Center -> Organization.
❑ Please check with your Dynamics 365 partner whether you have made any custom adjustments. They would be lost after an update without prior backup.

IF A VERSION EARLIER THAN B5057.000 / N5057.000 IS INSTALLED, THEN INTERRUPT THE INSTALLATION AND NOTIFY YOUR PARTNER OR US!

TIP:
We recommend that you make a backup before the update. It is usually unnecessary, but makes sense for security reasons.

2. Unzip the app/object file using WinZip.

3. Open Dynamics 365 Business Central / Microsoft Dynamics NAV and switch to the Object Designer by pressing Shift+F12 (Extras -> Object Designer).

You can see now all objects available for you in the BC/NAV database.

4. Go to File -> Import.

5. Enter the path to your saved APP/FOB file. The system will try now to import the file.

6. You will see info now that MUST be confirmed with OK or No.

NOTE:
ALWAYS open the import worksheet!

7. The import worksheet will open.

IMPORTANT NOTE:
It is IMPERATIVE that you click REPLACE ALL here! Finally, click OK to continue the import process!

The following message also appears in the RTC client (starting from NAV 2015) (confirm it by selecting "Force"):

Synchronization is automatically requested in the RTC client (starting from NAV 2015), please confirm this message with YES:

8. The objects are now imported into your database. After a successful installation, you will get the following completion message:

IMPORTANT NOTES:

We recommend that you compile the SwissSalary objects after import (F11). Please set a filter (F7) in the version list to **SwS*** and make sure that "**All**" is selected on the left-hand side. Please note that it is preferable to restart the BC/NAV service. As a rule, only the administrator with relevant permissions can do it (please execute during off-hours only when no users are logged in anymore).

IMPORTANT:
We do NOT provide any app import support in the onPrem environment. Please directly contact your Dynamics 365 partner for the installation of your BC 17 or BC 18 version.

9. Update Process

After a successful import of the objects, please switch to the SwissSalary main menu or Role Center.

Click the Personnel menu item (Personnel card). The system begins the update process automatically. A person with administrator rights should only open the main Update menu. Otherwise, the update will fail. Once the process is completed successfully, you will receive a completion message.

You will find an update history under Role Center -> Organization where all successfully imported update versions are logged.

The update process must be performed after every Update / Hotfix.

In the Excel table, you will see the objects that have been newly created or modified. These can be found together with Objects in the protected partner area on our website.

Explanation of the types:

1 = Table
3 = Report
4 = Dataport
5 = Codeunit
6 = XMLport
7 = MenuSuite
8 = Page
9 = Query

If you have any questions, please contact your Dynamics 365 partner or our support directly.

2.3   Access Rights and Permissions

Permission roles description:

Group ID	Name	Description
SWS-ALL	SwissSalary – All Users	The only user role that must be assigned to every SwissSalary user. The "Wage Accounting Process" feature requires that the system should obtain "indirect" information about all clients *(license check, how many*

		employees are currently accounted for in the entire database. Of course, the payroll staff member cannot see any data of the restricted clients).
SWS-CONS / SWS INVOICING (SwissSalary BAU only)	SwissSalary - Consortium SwissSalary - Invoicing	This role is used for working in the ARGE module. This permission role allows full access to ARGE items and ARGE posting journals. This role is suitable for employees that are only allowed to operate ARGE in payroll accounting.
SWS-EE-EDIT	SwissSalary – Edit Employees	This role is the classical assignment for payroll staff members that need to use all features of payroll accounting. The user can edit, delete, enter data in SwissSalary; however s/he cannot change payroll master data.
SWS-EE READ	SwissSalary – Read Employees	Similar to the SWS-EE EDIT role, with the exception that data can be viewed only, and not changed *(read-only rights).*
SWS-HR EDIT	SwissSalary – HR Edit Employee	PIS (Personal Information System) add-on module. A user with this role can modify, delete and enter data in PIS.
SWS-HR READ	SwissSalary – HR Read Employee	PIS (Personal Information System) add-on module. Read-only rights.
SWS-HR SETUP	SwissSalary – HR Setup	PIS (Personal Information System) add-on module. A user with this role can change settings in PIS. Classical HR wage administrator.
SWS-POST (SwissSalary NAV only)	SwissSalary – Posting	In accordance with the SOX guidelines, payroll staff member is not allowed to 'post wages'. This user role can be assigned to an employee in the FIBU that is exclusively responsible for wage posting. **IMPORTANT:** Of course, this employee must be also activated in SwissSalary under *Company -> Settings -> Users* or in the RTC version under *SwissSalary Administration -> Users*.
SWS-SETUP	SwissSalary – Setup	Classical authorization role for wage administrator
SWS-SETUP-LIGHT	SwissSalary - Setup Light	Same authorization as SWS-SETUP with the restriction that no changes can be made to the SwissSalary User
SWS-ST EDIT	SwissSalary – Edit Salary Type	Full access for editing wage types. A user with this role can create, modify and delete wage types.
SWS-BUDGET-EDIT	SwissSalary Budget - Edit	This role is used to create budget structures, FTE budgets, budgets in amounts and forecasts.
SWS-BUDGET-READ	SwissSalary Budget - Read	This role is used to read budget structures, FTE budgets, budgets in amounts and forecasts.
SWS-BUDGET-SETUP	SwissSalary Budget - Setup	This role is used for setup in the SwissSalary Budget module. Classical authorization role for wage administrators
SWS-KLE EDIT	SwissSalary KLE – Edit	KLE cases can be edited with this role. If this role is assigned, the SWS-EE-EDIT role or SWS-EE-READ role must also be assigned.

After each Update/PreUpdate the modified permission roles must be adjusted in SwissSalary *(new tables access, etc.)*

IMPORTANT NOTE:
❑ If you made individual adjustments in the *Default "SWS-*" permission roles*, please bear in mind that they are overwritten with the automatic import of the "default" roles.
❑ Be sure to add these new tables to the relevant permission roles before releasing the system for the users!

The import process for default roles is started via *Role Center-> Organization*. Here you can "Install all Store updates" with a single click:

In case of customer-specific roles, select relevant path for the ZIP file in the *Options tab* and choose *Import* under *Direction*. Then click OK, default user roles are adjusted in SwissSalary.

If you made changes to our default user roles or want to manually maintain user roles, you can do so below or under *Extras -> Security -> Roles*. Click the relevant role and add the new tables under *Role -> Access rights*. This setting can be found in the RTC client under Departments -> Administration -> IT administration -> General -> Sets of rights. If you have any questions about these settings, contact the partner responsible for you.

The tables below have been rebuilt and must be added to the relevant roles *(if already used and for companies that do not work with default permissions)*:

Update Version	Table No.	Lösung	Table Name
5059.000	3049164	All	SwS Company Group
5059.000	3049215	All	SwS Contact

SwissSalary Role Center
Each BC-/NAV module has its own role center. For this purpose, SwissSalary has developed the SwS Payroll Role Center. We recommend that you work with this role center in the area of wages. You can also import the role center (XML file is included with the update objects).