



# SwissSalary Insights

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More information: [docs.swissalary.ch](https://docs.swissalary.ch)



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### Legal Notice

SwissSalary AG (SwissSalary Ltd.)  
Bernstrasse 28  
CH-3322 Urtenen-Schönbühl  
Schweiz

Phone: +41 (0)31 950 07 77  
support@swisssalary.ch  
swisssalary.ch

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# 1 SwissSalary Insights

## 1.1 System requirements

- Microsoft Dynamics 365 Business Central version 14 or newer
- SwissSalary PLUS 5057.000 release or above
- Web services published continuously
- Licensed service users having "SUPER" rights / no client restrictions and having a web service access key
- Azure Active Directory multi-factor authentication must be enabled for all SwissSalary Insights user

Additional requirements for customers with local Dynamics versions

- It should be possible to authenticate Business Central user email
- Azure AD Connect or Active Directory Federation Services (ADFS)
- If Dynamics Authentication is set to Windows Authentication or Database Password Authentication, the email address corresponding to Active Directory must be entered in the User card in Dynamics User Management.
- A Middle Tier Service (Microsoft Dynamics 365 Business Central Server) for retrieving the web services must be permanently active and meet the following two criteria:
  - Type of credentials: NavUserPassword
  - Use NTLM authentication: false
- Business Central web services published online using https and a valid SSL certificate

Notes for all SwissSalary Insights customers

Only one SwissSalary user can be set up as an Insights user and needs active multi-factor authentication to log into the SwissSalary Insights web app.

## 1.2 Brief description

With SwissSalary Insights you get the best possible overview of movements in your company. You can evaluate and compare data more easily than ever before. With the web-based solution, you always have an overview, regardless of whether you are at home, on the go or in the office. With the cloud service your current data are displayed simply and clearly. Gain a wide range of insights from your company with just one click.

### **Current key figures**

Your current data is synchronized with SwissSalary Insights from the SwissSalary 365 app and can be displayed independently through a wide variety of reports. You can visualize the desired information simply and clearly using various reports and dashboards provided.

### **Security and updates**

All data is synchronized from the SwissSalary 365 app and is always transmitted in an encrypted form. It is then displayed visually and never passed on to third parties. Our Development Department takes care of the cloud service, backups and regular updates. This means that you will always be up to date. You control access to the data using different user privileges or user groups.

## 2 One-time Setup

### 2.1 Service User

The data from the SwissSalary app is retrieved from SwissSalary Insights using the web services. A so-called service user is required for this purpose. It is recommended to create a new user and not to use an existing employee for this. If such a user already exists, you can use it. The user should have a meaningful name so that it is recognized as a "service" user and should not be removed. For the sake of this documentation, we call them Service User.

One of the licenses below must be assigned to the service user:

- ▲ Dynamics 365 Business Central Team Member
- ▲ Dynamics 365 Business Central Essentials
- ▲ Dynamics 365 Business Central Premium

The service user needs to have SUPERpermissions set in Business Central and must not have any client restrictions. In addition, a web service access key must be created (also in the user card).

### 2.2 Web services

The required web services are automatically created in the SwissSalary app when the first Insights user is set up. They may not be removed. If a web service was accidentally removed, it can be added manually at any time. The web services below are created automatically and must remain 'published': As of March 2, 2022

Objektart ↑	Objekt-ID	Objektname	Servicename ↑ ▼	Alle Tenants	Veröff...	OData V4-URL
Seite	3049471	Abrechnungskreis WS	InsightsAllocationGroup	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049481	Mandant WS	InsightsCompanies	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049463	Insights / Dashboard	InsightsDashboardGroup	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049472	Abteilung WS	InsightsDepartment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049473	Mitarbeiter WS	InsightsEmployee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049465	Insights Gruppen	InsightsGroups	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049467	Unfall Körperteil WS	InsightsKLEAccidentBodyPart	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049468	Case Liste WS	InsightsKLECaseList	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049469	Unfallbeschreibung WS	InsightsKLEPartAccidentDesc	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049470	Teil Arbeitsunfähigkeit WS	InsightsKLEPartIncapToWork	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049474	Lohnlauf Kopf WS	InsightsPayrollHead	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049482	Berechtigungssatz WS	InsightsPermissionSet	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049475	Rückstellungen WS	InsightsProvisions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049476	Austrittsgrund WS	InsightsResignationReason	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049477	Lohnposten WS	InsightsSalaryEntry	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049479	Lohnart WS	InsightsSalaryType	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049478	Lohnarten Gruppe WS	InsightsSalaryTypeGroup	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
Seite	3049480	Zeitarten WS	InsightsTimeTypes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...
→ Seite	:	3049483	Benutzer WS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...

### 2.3 Insights User

To log in to the SwissSalary Insights web portal, you must be included as a user into the Insights user list.  
=> Management - Insights - User setup

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An existing system user should be selected in the User name field. Access can be time limited using the validity fields. If no restriction is required, leave the field blank.

The Insights user only has to be created once per instance (across clients).

S/he always has maximum access only to clients/data in which he is also created and authorized as a SwissSalary user (SwissSalary user set up) or restricted by means of a payroll area filter and/or Insights group filter.

=> check whether the new Insights user is entered as 'Employee' in the desired clients and whether they have set the appropriate filter in these clients in the payroll area and/or in the Insights groups

The next chapter Insights Groups explains how Insights Groups filters are defined.

## 2.4 Insights Groups

The Insights user can be restricted by clients in the existing dashboards view on the SwissSalary Insights portal. If the Insight user has no restriction, the Insights Groups table can be left blank.

Restriction can be controlled using the Insights groups. These permissions groups enable simple management in case of a larger number of users or in the event of any changes. This means that the dashboards do not have to be assigned individually for each user.

=> Management - Insights - Insights Groups

Enter a name and an appropriate description, then select the dashboards you want the group to view.

The new Insights group filters must then be assigned to the desired users per client. => SwissSalary User Setup

In contrast to the payroll group filter, this filter has no influence on the data the user can view in the SwissSalary app, it only refers though to the restriction on the SwissSalary Insights Portal.

As usual, multiple filters can be listed in the Business Central environment using the "|" divider.

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## 3 SwissSalary Insights Dashboard

### 3.1 Dashboard Groups

**Employees:** FTE and headcount, departments, diversity, fluctuation, employee card

**KLE:** Absences, occupational accidents, non-occupational accidents, illness, details of KLE cases

**Salary data:** Allowances, deductions, expenses, employer contributions

**Work hours:** Time balance of holidays and overtime, provisions per employee or department

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## **4 Under development**

### **4.1 Export ou Reports**

Export of reports is under development and can be expected starting from Q3 2022.