Update 5060.000

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1 Update 5060.000 | User

1.1 Update 5060.000 | Introduction

Dear SwissSalary Customers,
Dear SwissSalary Partners,

We present to you the manual for SwissSalary Update 5060.000 of 3rd of November 2022. It also includes documentation on the quality releases from 5059.001 until 5059.003. 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. Starting with SwissSalary version 5060.000, it is no longer necessary to import all versions chronologically and it is not mandatory to import SwissSalary version 5059.000. 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. 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 5060.000 is available for the following **Business Central** versions (onPrem/private cloud):

o **new** Dynamics 365 Business Central 2022 Wave 2 - Version 21 (AL)
o Dynamics 365 Business Central 2022 Wave 1 - Version 20 (AL)
o Dynamics 365 Business Central 2021 Wave 2 - Version 19 (AL)

o Dynamics 365 Business Central Spring' 19 - Version 14 (C/AL)
o Dynamics 365 Business Central Fall' 18 - Version 13 (C/AL)

'Dynamics 365 Business Central 2021 Wave 2 - Version 19 (AL)' will no longer be supported as of Update 5061.000 (april/may 2023). Please update your solution to Business Central 2022 Wave 1 - Version 20 (AL) as soon as possible to profit of all new features.

In SaaS (Public Cloud from Microsoft) we always support the latest version, thus we release the SwissSalary Update 5060.000 only for BC 21. Note that also existing sandboxes have to be migrated to install 5060.000.

❑**SwissSalary onPrem | Dynamics NAV**
SwissSalary Update 5060.000 is available for the following **Dynamics NAV** versions (onPrem/private cloud):
o Dynamics NAV 2018
o Dynamics NAV 2017

❑**SwissSalary BAU Customers**
Customers using SwissSalary BAU solution receive this update for 'Dynamics 365 Business Central Spring' 19 - Version 14 (C/AL)' only.
The SwissSalary update 5060.000 is the last update for the BC14 version. The information about the necessary steps was sent by mail to our customers with the SwissSalary BAU solution.

❑**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 2017 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   Paycheck | Salary Types consolidation

Task #10986 | 5060.000

With the setup 'Additional text' – "Merging", the (translated) salary type description is now always displayed on the Paycheck for a salary type.

1.2.2 Paycheck | Vacation balance with period start day

Task #11679 | 5060.000

Vacation credit balances were not calculated correctly on the Paycheck and in the Management Rapport Journal if the salary were calculated with the period start day 1.
This bug has been fixed.

1.2.3 Salary certificate | Subsequent wage payment

Task #11575 | 5060.000

If an employee dies, a third party may be entitled to a subsequent wage payment.

The salary type has been delivered for some time with the initialization. If you cannot find it in the salary type master, you can set it up accordingly.
The employment relationship ends on the day of death, which is why it is recorded as the date of resignation.
Enter new bank details for the beneficiary and show all fields in the Beneficiary tab. Activate Continued Provision Of Salary.
Set a time limit on the previous bank details so that these new bank details are taken into account for subsequent wage payment.
Process the subsequent wage payment via the report using the appropriate salary type and the beneficiary's bank details.
Now create the wage statement. The text specified by Swissdec is displayed for the deceased under section 15: Continued Provision Of Salary to *last name*, *first name*, *address*, *ZIP code and settlement*.
The value is shown under section 4, Capital contributions. This assignment is based on the salary type setup itself.

1.2.4 List of differences | Filter function

Task #11563 | 5059.002

When the list of differences was created, not all wage types with differences were displayed if the salary type filter was used. This bug has been fixed.

1.2.5 Salary certificate | Partecipations

Task #11405 | 5060.000

According to the wage statement instructions, in various cases comments are required in paragraph 15 of the wage statement. For shareholdings without taxable income, the four options below are now available under the Wage statement tab in the employee card:
- blocked employee options
- non-listed employee options
- entitlements to employee stock
- false employee shareholdings

1.2.6 Salary certificate | Employment %

Task #11744 | 5060.000

Up until now, the Employment % was printed on the Salary certificate in section 15, Comments if the percents by position were less than 100.00% in the last pay process of the fiscal period. The Employment % is now printed in section 15, Comments if the percents by position in the last pay process of the fiscal period are greater than 0.00% and less than 100.00%.

1.2.7 Salary certificate | Expat ruling

Task #11386 | 5060.000

The approved expat ruling can be stored in the Salary Certification tab in the Employee card. If there is an approved expat ruling, it will be printed on the wage statement in para. 15. If wage types are associated with para. 13.1.2 and no expat ruling is associated with the personnel card, then the text and amount in para. 13.1.2 will be printed.

1.2.8 Salary certificate | Address after resignation

Task #11489 | 5060.000

If an employee resigns, the address is relevant for the Salary certificate at the time of resignation. If an address change was processed via a TimeMachine entry after resignation, the address of this pay process was taken into account for the Salary certificate. This has been corrected and pay processes after resignation no longer affect the address on the wage statement.

1.2.9 Salary certificate | Child allowances from compensation office

Task #11545 | 5060.000

Child allowances in the Canton of Geneva are paid directly via the compensation office. Employees who live in France and have children receive child allowances, for example, on a quarterly, and not monthly, basis. These payments would have to be recorded with wage types "Previous-year child allowance correction" and "Child allowance correction" with assignment to the child. The text "Child allowance paid by the compensation office" now appears on the wage statement under section 15, even if only corrections with the correct amount were reported.

1.2.10 Salary certificate | Rectified

Task #11496 | 5060.000

With the Swissdec 5.0 standard activation, a unique document ID is now generated for each Salary certificate when reporting it. It is also displayed on the Salary certificate.
If a Salary certificate has to be subsequently replaced for an individual person, this should be done by creating a rectified version.
Make the necessary changes / additions and then go to the Tax Declaration tab in the Employee card. Use "Show more fields" to see a value for the number of document rectifications. Click the number.
Salary certificate will be displayed. Select the entry to be replaced and initiate the process Submit rectified Salary certificate or Print rectified Salary certificate, depending on whether you want to send it to the tax office or generate a PDF.
The proof run that this wage statement replaces the incorrect document now takes place automatically.

If all Salary certificate have to be resent, you can do this via the replacement notification and do not have to do this step for each person. The creation of the rectified version is only intended if individual documents have to be created again.

1.2.11 Annual reports | Social security number

Task #11497 | 5060.000

Due to Swissdec requirements, social security numbers of persons were added to the reports below:
- AHV Free Summary
- AHV Summary
- FAK Summary details
- FAK Summary total

1.2.12 Annual Reports AHV | Sample

Task #11498 | 5060.000

Due to Swissdec requirements, the UID-BFS-No. and the Valid from date of UVG and BVG insurance were added to the AHV Summary.

1.2.13 FAK annual statement | Selection

Task #11756 | 5060.000

We have enhanced the FAK accounting. The "Compensation fund" field is now available on the request page. The selection is required if the FAK compensation fund was changed at the end of the year and income from other periods (back payments after resignation) was processed in the current year (reporting year). Because in this case, the portion of the previous year must be reported to the FAK compensation fund with which you were affiliated at the time.

- By default, the FAK compensation fund entered in the "Contract" field in the Payroll Setup -> KIZU setup is always suggested. If no contract is entered in the KIZU setup for the corresponding canton, the payroll Setup compensation fund ("AHV contract" field) is suggested.
- The list of FAK compensation funds appears by clicking the "Compensation fund" field. This list only contains the compensation funds for which payroll processing was carried out in the relevant reporting period.

Note: Before you select the compensation fund, you must enter the correct data in the "Settlement from" and "Settlement to" fields. In addition, the corresponding FAK paying agent must also be entered beforehand. This is the only way SwissSalary can determine whether there are wage items for various compensation funds for the selected reporting period and the selected FAK paying agent.

- The name of the selected AHV compensation fund is displayed in the "Designation" field.

In order for the payroll number and compensation office number to be printed on the FAK settlement report, the contract data must be entered in the payroll Setup.

1.2.14 AHV annual statement | Compensation office change

Task #11753 | 5060.000

We have enhanced the AHV wage statement. The "Compensation fund" field is now available on the request page. The selection is required if the AHV Compensation fund was changed at the end of the year and income from other periods (back payments after resignation) was processed in the current year (reporting year). Because in this case, income from other periods must be reported to the AHV Compensation fund with which you were affiliated at the time.

- By default, the AHV Compensation fund entered in the "AHV contract" field in the Payroll Setup is always suggested.
- The list of AHV Compensation fund appears by clicking the "Compensation fund" field. This list only contains the AHV Compensation fund for which payroll processing was carried out in the relevant reporting period.

Note: Before you select the Compensation fund, you must first enter the correct final date of the year.

- The name of the selected AHV Compensation fund is displayed in the "Designation" field.

1.2.15 AHV annual statement | Negative salary

Task #11493 | 5060.000

If a negative AHV salary has to be accounted due to daily allowances being processed over a period of several years, this is shown in a new way. This was implemented in accordance with Swissdec specifications as part of the certification.

1.2.16 Employee list | Displayed dimension

Task #11465 | 5060.000

The oldest dimension was always displayed in the Dimension assignment column in the Employee list report despite correct maintenance of the "Valid from / Valid until" fields. This bug has been fixed and the currently valid dimension is now always displayed.

1.2.17 Child allowances/education benefits expiration | Missing date

Task #11585 | 5060.000

The expiry date of the "Child allowances/education benefits expiration" report was not displayed correctly in English (ENU) and French (FRS). This bug has been fixed.

1.2.18 ALV intermediate certificate of permit | Position

Task #11524 | 5060.000

Job description from the Employee card in the "ALV intermediate certificate of permit" report is now automatically adopted in the "Working as" field in the input form.

1.2.19 ALV Attestation of Employer | E-Mail

Task #10151 | 5060.000

The email and phone no. are printed for the ALV certificate in the following priority:
1. Priority = Email and phone number of the staff member
2. Priority = Email and phone number of the person in charge
3. Priority = Email and phone number from company information

1.2.20 A4H absences list | Output to Excel

Task #11463 | 5060.000

The A4H absences list can now also be output in Excel format.

1.2.21 Absences mirror | Weekends

Task #11593 | 5060.000

The color of the weekends in the absences report has been changed to gray.

1.2.22 Holiday control | Sort function

Task #11709 | 5060.000

The holiday control report has been supplemented with a sort function (similar to the report in the Windows client). When the Holiday control report is generated, you can now specify, for example, that that it should be sorted by search term or personnel No.

1.3 Swissdec 5.0

1.3.1 BUR number | Prefix

Task #11668 | 5060.000

Swissdec 5.0 contains a default value for the new BUR number. It used to contain 8 digits, now an alphanumeric prefix is placed in front. The Federal Statistical Office has confirmed to us that letter "A" can always be placed in front of the BUR number for the existing BUR numbers. Setup must be carried out in the 'Workplace' table for each workplace entry and must be completed manually before the first submission after submission activation according to Swissdec 5.0.

1.3.2 ALV limit values calculation | Re-recruitment

Task #11373 | 5060.000

With the implementation of the Swissdec 5.0 guidelines, an adjustment was made for the consideration of ALV / ALVZ limit values.
If a person is re-recruited by the company in the same year, the values from the previous employment are taken into account for the calculation of the limit values.
In any case, pro rata limits for the months of employment are taken into account only once. No limit values are taken into account for the months with no employment.

1.3.3 UVG limit values calculation | Re-recruitment

Task #11370 | 5060.000

With the implementation of the Swissdec 5.0 guidelines, an adjustment was made for the consideration of UVG limit values.
If a person is re-recruited by the company in the same year, the values from the previous employment are taken into account for the calculation of the limit values. Any change in the UVG code will be taken into account for calculation.
In any case, pro rata limits for the months of employment are taken into account only once. No limit values are taken into account for the months with no employment.

1.3.4 KTG limit values calculation | Re-recruitment

Task #11371 | 5060.000

With the implementation of the Swissdec 5.0 guidelines, an adjustment was made for the consideration of KTG limit values.
If a person is re-recruited by the company in the same year, the values from the previous employment are taken into account for the calculation of the limit values. Any change in the KTG code will be taken into account for calculation.
In any case, pro rata limits for the months of employment are taken into account only once. No limit values are taken into account for the months with no employment.

1.3.5 UVGZ limit values calculation | Re-recruitment

Task #11372 | 5060.000

With the implementation of the Swissdec 5.0 guidelines, an adjustment was made for the consideration of UVGZ limit values.
If a person is re-recruited by the company in the same year, the values from the previous employment are taken into account for the calculation of the limit values. Any change in the UVGZ code will be taken into account for calculation.
In any case, pro rata limits for the months of employment are taken into account only once. No limit values are taken into account for the months with no employment.

1.3.6 FSO statistics | FlexProfiling

Task #11461 | 5060.000

The item from the Swissdec 5.0 guidelines below has been implemented:

11.3.7 Flexible field for profiling
This variable can only be filled in if a corresponding agreement has been made in advance between the FSO and the company in the context of profiling. This is additional information required to take into ac-count certain peculiarities of some companies (e.g. differentiation of the personnel considered).

1.3.7 ELM reporting | UVG insurer unknown

Task #11422 | 5060.000

For Swissdec 5.0, it is mandatory to export the UVG (Swiss Federal Law on Accident Insurance) insurer. This can be done with the value Unknown if the value is not recorded.
If no UVG insurance is set in SwissSalary, the system can now also export to the "Unknown" XML node and also "NoneWithReason" XML node.
No action is required by the user here. It is simply that the technical specifications from the directives have been implemented.

1.3.8   Salary declaration | EMA reporting

Task #11423 | 5060.000

With the changeover to transmission in accordance with Swissdec 5.0, notification of EMA (residents' registration office) joinings/mutations/resignations for the FAK (family compensation fund) can also be performed with the AHV (old-age and survivors' insurance) notification.

1.3.9   Salary declaration | LSE renamed to statistics

Task #11747 | 5060.000

We have renamed the term "LSE" to "Statistics" on the "Report wages" page and in the list of ELM wage reports that have been carried out.

- **Periodicity/deadline transmission**
Is there a deadline for sending data to the BFS via ELM 5.0?
Yes, the data for the survey month must be transmitted by the middle of the following month at the latest (e.g. ~15 April for March data).

- **Implementation date**
If I send my data to the BFS via ELM 5.0, do I still have to participate in the affected surveys via the existing channels (e.g. questionnaire, e-survey, etc.)?
No, for regular mailings it is no longer necessary to answer the corresponding surveys (e.g. LSE, BESTA) separately. ELM 5.0 covers the information needs for these surveys.

A single channel for multiple surveys
Companies and administrations no longer need to differentiate between the various surveys concerned in their system. They store their data once in their ERP (Enterprise Resource Planning) system and thus deliver the required information directly to several recipients at the BFS.
With ELM, all the data collected can be grouped and transmitted on a monthly basis.

Further information can be found at: BFS data transmission via elm

1.3.10   Salary declaration | IT rate changes

Task #10968 | 5060.000

With the Swissdec 5.0 certification, adjustments are made to the data submitted via 'Salary declaration'.
For cantons with an annual accounting method, the calculations for employees with rate changes during the year must also be continued for the rates that are no longer current. Rate determination is calculated with smoothed value for the whole year. This has already been done correctly for employees. The view in the file generated via 'Salary declaration' is now better presented and can thus be processed by the tax authorities. Swissdec published the requirements as part of the certification and they were adopted and implemented.

1.3.11   Salary declaration | Retroactive IT rate change

Task #10816 | 5060.000

With the Swissdec 5.0 certification, adjustments are made to the data submitted via 'Salary declaration'.
For cantons with an annual accounting method, employees with retrospective rate changes must be shown separately for each corrected month during submission. This has already been presented for the cantons with

a monthly accounting method. Swissdec published the requirements as part of the certification and they were adopted and implemented.

1.3.12 Salary declaration | IT obligation end

Task #10057 | 5060.000

With the Swissdec 5.0 certification, adjustments are made to the data submitted via 'Salary declaration'.
If a person was subject to the WT or not subject to the WT in a previous period, a correction must be reported with NON or NOY. Swissdec published the requirements as part of the certification and they were adopted and implemented.

1.3.13 Salary declaration | IT category Special agreement FR

Task #10020 | 5060.000

With the Swissdec 5.0 certification, adjustments are made to the data submitted via 'Salary declaration'.
For cross-border workers from France working in a canton that applies the special agreement for France, an adjustment is made in the submission when the special agreement for France is issued. Here, however, only the requirement has changed as to how it must be exported, the new code is SFN. Swissdec published the requirements as part of the certification and they were adopted and implemented.

1.3.14 Salary declaration | Other income sources IT

Task #11147 | 5060.000

Income tax salary reporting is adjusted with the certification according to Swissdec 5.0. With the implementation of the Income tax calculation, which came into effect on January 1, 2021, other income sources are decisive for rate determination. The calculation has been carried out since update 5056.002, taking other income sources into account.
Now it is also shown in the transmission if further other income sources are activated. Other income sources being settled and the known total level of employment at other employers are transmitted.

1.3.15 Salary declaration | ELM dialog

Task #11027 | 5060.000

A dialog feature for wage reporting is implemented with Swissdec 5.0.

The dialog is now integrated into the entire ELM process. But there are new statuses and new objects. The dialog can mainly be retrieved via the SalaryDeclaration Page (there is both a button and a fact box).
If an insurer sends back a dialog message during wage reporting, a dialog process is run through before the process can continue. The process can only be continued after the dialogs have been successfully processed. Users cannot trigger any dialogs themselves during wage reporting, only dialogs from the insurer can be read and answered.

1.3.16   Salary declaration | No UVG insurer

Task #9890 | 5060.000

As a rule, UVG insurer is reported along with AHV declaration. If no UVG insurer is set up, then "no UVG insurer activated" will be reported in the XML. This was implemented as part of Swissdec 5.0 certification by arrangement with Swissdec.

1.3.17   Salary declaration | No BVG insurer

Task #9891 | 5060.000

As a rule, BVG insurer is reported along with AHV declaration. If no BVG insurer is set up, then "no BVG insurer activated" will be reported in the XML. This was implemented as part of Swissdec 5.0 certification by arrangement with Swissdec.

1.3.18   BVG report | Adjustment reasons

Task #11424 | 5060.000

The specified reasons for adjusting the BVG were incorporated into the XML in accordance with Swissdec 5.0. This includes adjustments of:
- Salary
- Level of employment
- Benefit plan, undertaking, category
- Home address
- Other

1.3.19   Payroll Setup | UVGZ insurance contract

Task #9908 | 5060.000

A new field was implemented as part of Swissdec 5.0 certification when setting up the insurance contract for the UVGZ insurer. The policy commencement date can be entered in the Valid from field. The field's functionality is not currently developed and is intended for a later release.

1.3.20   Payroll Setup | KTG insurance contract

Task #9909 | 5060.000

A new field was implemented as part of Swissdec 5.0 certification when setting up the insurance contract for the KTG insurer. The policy commencement date can be entered in the Valid from field. The field's functionality is not currently developed and is intended for a later release.

1.4   Interfaces

1.4.1   Web services | TimeMachine

Task #11717 | 5060.000

For various entries in the Employee card or in the Management journal, the user must confirm after input, for example, whether the recorded date of resignation should also apply to the BVG or whether something should really be reported for an employee who has already resigned.

However, if the original entry is made via a WebService, the following confirmation request cannot be responded to. SwissSalary is now programmed in a way to have the most likely variant always selected here. For example, the date of resignation is also recorded at the BVG and a report is filed for an employee who has already resigned. If this does not produce the desired result, the linked field must be adjusted (deleted) via WebService.

In most cases, the selection corresponds to the value that is already suggested to the user.

1.4.2   Interface | Arbeitszeugnis swiss+

Task #11528 | 5060.000

Two more fields were added for the Arbeitszeugnis swiss+ interface.
Department description and workplace label are now also available in the interface.

1.4.3   SAP Business byDesign Interface | Posting date error

Task #11509 | 5059.001

Beginning from the last update 5059.000, there has been an error in the interface to SAP Business by Design preventing the salary from being posted on the SwissSalary side. The transmission to SAP worked at all times and led to multiple entries in SAP after several attempts. SwissSalary has now introduced a correction and the posting can be made in one step.

1.4.4   SAP Excel | zip file

Task #11506 | 5060.000

A ZIP with two files is now created with the SAP (Excel) interface when wages are posted, if they are posted with provisions for holidays and overtime: a file with the postings including provisions and a file with provision reversals.

1.4.5   SmartPort | Error message e-mail

Task #11569 | 5060.000

The error message that occurred when modifying an e-mail address via SmartPort has been fixed.
In certain constellations, an error message may have appeared when there was an e-mail address mutation.

1.4.6   SmartPort | Future change of address from Direct

Task #11574 | 5060.000

Address and bank data changes can now also be imported via SmartPort if the "valid from" date taken from SwissSalary Direct is in the future.
In case of a change in the future, the entry from SmartPort will be added to TimeMachine.

1.4.7 SmartPort protocol | Fact box

Task #11660 | 5060.000

The details of a booked SmartPort change ("SwS SmartPort Posted Change") can now be shown on a separate page.
The new page can be opened via "SmartPort protocol": (SmartPort protocol --> Manage --> View)
The currently existing fact box has been hidden and can still be displayed again if required.

1.5 Income Tax

1.5.1 Year-to-year back payment | Previous year rate

Task #11375 | 5060.000

In the case of back payment after resignation, the resignation statement is rolled up and the rate of the resignation month/year (previous year) is applied to the new statement.
If you activate "Back payment after resignation without recalculation" on the personnel card in the WT tab, the accounting month/year (current year) rate is applied.

1.5.2 Employee card | Partner data prompt

Task #11671 | 5060.000

For employees subject to Income tax and whose marital status is 'married' or 'in a registered partnership', partner data must be recorded, because it must be included in the submission.
It used to be so, if the 'marital status' field was changed accordingly, the notification about the need to enter partner data was triggered.
However, the transmission is linked to a corresponding IT rate. Therefore, the message for entering partner data is now displayed with rate adjustment.

1.5.3 Calculation of rate-determining value | Two pay processes with recruitment during the month

Task #11369 | 5060.000

With the implementation of the Swissdec 5.0 guidelines, an adjustment was made for the calculation of the rate-determining value.
In the case of employees who resigned and were re-recruited in the same month and therefore had two pay processes, rate determination was incorrect during the second pay process. This bug has been fixed.

1.5.4 Rate-determining wage | Back payment for canton with annual billing

Task #11667 | 5060.000

As to back payments to employees subject to Income tax who have left the canton with an annual accounting method, an adjustment has been made to the requirements for calculating the rate determination.
The rate-determining value is calculated identically, regardless of whether the leaving statement has to be rolled up or whether it is a back payment after resignation without recalculation.
This is due to an adjustment to the calculation of the Swissdec / IT guidelines with the consideration of Circular 45.

1.6 KLE

1.6.1 KLE | Calculation of the 13th MW Hourly salary

Task #11501 | 5059.001

A correction had to be made during the calculation of the 13th monthly wage for hourly wage recipients with immediate payment so that the values are not taken into account twice in the UKA interface and KLE (electronic accident and illness reports).

1.6.2 KLE | Extrapolate statistics for hourly wages

Task #11549 | 5060.000

For hourly wage employees without posted wages, the statistical wages can now be calculated correctly.

1.6.3 KLE | 14th monthly salary statistics

Task #11550 | 5060.000

The 14th monthly salary is treated the same way as the 13th monthly salary for the calculation of the insured earnings. It is offset against * 12. The calculation type is set to expected in the "Accident insured earnings" field during salary type setup.

1.6.4 KLE | Return to work date

Task #11570 | 5060.000

The Incapacity to perform duties story has been equipped with a ToolTip to describe the "Full incapacity to perform duties" field more precisely. Enter the full return to work date here as soon as it becomes known.

1.6.5 KLE | Internal documents and annotations

Task #11571 | 5060.000

Comments (annotations and links) for internal purposes can now also be added to KLE cases. They are not submitted to the insurance company.

1.6.6 KLE | Relapse before recruitment

Task #11516 | 5060.000

Relapses can now also be reported if the employee's recruitment date is later than the date of the incident.

1.6.7 KLE | Third-party insurance

Task #9996 | 5060.000

Third-party insurance can now be entered via KLE Insurance Case (under Edit claim number or Third-party insurance). This means that it is implemented. It can be ensured this way that the accident report is received by the third-party insurance company instead of SUVA.

1.6.8 KLE | Direct File Type Filter

Task #11389 | 5060.000

These file types can be synchronized between KLE and SwissSalary Direct: png, jpg, jpeg and pdf

1.6.9 KLE | Wage data claim reporting

Task #11765 | 5060.000

During claim report generation from KLE via preview wage data was printed despite the fact that the "Wage data" button was disabled. This bug has been fixed.

1.7 SwissSalary Budget

1.7.1 Budget | Structure survey

Task #11367 | 5060.000

In the event of a complex department structure with various higher-level departments and hierarchy, an error message would previously appear when the budget structure grouped by department is created. This could be fixed with shorter filter values.

1.7.2 Budget | Structure generated with time period

Task #11650 | 5060.000

Budget structure by employees used to be created on the key date.
The structure can now be generated with "from/to date". All employees active during a part of this period are thus listed in the structure.
The data is retrieved from the current settings in the Employee card.

1.7.3 Budget | Dimension structure

Task #11433 | 5060.000

New non-editable rows cannot be added anymore in the Dimensions infobox of the budget structure.

1.7.4   Budget | Posting categories

Task #11006 | 5060.000

Posting category can now be added to budget structure and budget scheme matrix.

1.7.5   Budget | Salary class and Salary level matrix

Task #11653 | 5060.000

Wage class and Salary level are now automatically pulled in the budget matrix and no longer have to be selected manually.

1.7.6   Budget | Scheme column selection

Task #11561 | 5060.000

The fields below can now be displayed in budget structure and in budget scheme:
- Wage code
- Payroll area
- Function indication
- Posting category

To have these filled in automatically, the structure must be rebuilt.

1.7.7   Budget | Allocation with cost center splitting

Task #11523 | 5060.000

If several dimensions were assigned to employees, only one dimension was previously correctly mapped in budget structure and in scheme. This has been corrected and splitting is now correctly displayed in the budget.

1.7.8   Budget | Fibu account filter

Task #11704 | 5060.000

Fibu account filter could be filled out in the budget column layout, but the values were not filtered correctly in the budget matrix. This works now.

1.7.9   Budget | FTE posts

Task #11792 | 5060.000

Up until now, FTE posts were displayed too high when copying the ACTUAL FTE. This is now corrected and the correct FTE is displayed.

1.7.10   Budget | Calculated BVG contributions

Task #9510 | 5060.000

BVG contributions are now not only taken from wage items into account in the "Calculate budget" report, but also when BVG deductions are calculated as a percentage based on a BVG plan.

1.7.11 Budget | Show dimension

Task #11503 | 5060.000

The Dimension assignment column can now be shown in the vacancies overview.

1.7.12 Budget | Column layout

Task #11601 | 5060.000

The Always option could no longer be selected in SwissSalary Budget column layouts under Display in the web client. This is now fixed.

1.8 Administration

1.8.1 Allocation Group | Down-payment status field selection

Task #11658 | 5060.000

The Down-payment status selection field used to be displayed in the Allocation Group settings under the Accounting method tab. Since this selection field is rarely used, it is now hidden by default.

1.8.2 Payroll Setup | Elimination of 0.0% ALVZ solidarity surcharge starting from January 1, 2023

Task #11804 | 5060.000

The solidarity surcharge (AVLZ) of 1% (Employee 0.5%/Employer 0.5%) will no longer be effective starting from January 1, 2023. For calculation in SwissSalary in 2023 to be correct, the percentages must be set to 0.00 in the payroll master data before the first pay process for the year 2023 ("ALV" tab, "Employer ALVZ %" and "Employee ALVZ %" fields). The 0.5% will continue to be charged for back payments after resignation in 2022.

For more information, please visit: ALVZ solidarity surcharge is eliminated

1.8.3 Payroll Setup | KLE and SUA contact

Task #11512 | 5059.001

If the "Delegate" field in Swissdec settings is filled with a company contact (company name and address), the UID BFS-No. must be entered. The last name and first name of a contact person are no longer required.
This is the case when a company has commissioned a trustee agency. Otherwise, it can remain empty.

1.8.4 Payroll Setup | Cancellation block

Task #11627 | 5060.000

In the Payroll Setup, the field for activation of the cancellation block when generating the payment file has been redesigned. The old field Cancellation block for DTA has been replaced by the field Cancellation block for payment. The value of the previous field is adopted as part of the update process. If the cancellation block was previously activated, it will also be active after installing the update.

1.8.5   Payroll Setup | Company code statistics

Task #11577 | 5060.000

TextSwissdec Guidelines V 5.0 – Company code
Companies and data recipients use company codes to form "packages" that are transmitted independently of each other via ELM. Company codes can also be used to separate different personnel categories. The use of the field requires prior clarification with the FSO.
Therefore, there is a new field in the payroll Setup in which the company code can be entered as free text. As soon as this field has been filled in, the company code is also transmitted via XML file.
Based on this field's relevance, it is hidden by default and can be added manually if required: Payroll Setup -> "Customize this page" or "Personalize".

1.8.6   Document type | Direct delivery

Task #11520 | 5060.000

A file category can now be marked under Documents with "Synch with Direct". If a document is imported into this category, it is sent to SwissSalary Direct using the "Send dossier documents" function in the SwissSalary Direct settings under Actions.

1.9   Payroll

1.9.1   Work calendar | Hours-to-days conversion

Task #11613 | 5060.000

The conversion from hours to days is based on the target time of the corresponding day in the work calendar. The number of hours per document date is compared with the target time of the corresponding day in the work calendar and converted into days.

The sequence of hours-to-days conversion is as follows:
1. Target hours of the work calendar
2. Unit fixed value in workgroup
3. Unit fixed value of the salary type

1.9.2   TapBoard | Name / month display error

Task #11644 | 5060.000

Wrong name was sometimes displayed in the title in TapBoard. This has been fixed now.

1.9.3   Period start day 1 | Workload change

Task #11296 | 5060.000

When period start day 1 was used, target time was already reduced one month earlier according to the rules in the event of a workload reduction (entry via TimeMachine). As a result, too many overtime hours were calculated. The rule has now been adjusted so that the target time is now reduced in the month in which the workload reduction is effective also.

1.9.4   Payroll | Recalculation of child allowances

Task #11682 | 5060.000

Incorrect calculation of the original recruitment date for recruitment date payroll accounting (re-recruitment date) has been corrected.

1.9.5   Management Rapport Journal | Error message during preview

Task #11602 | 5060.000

When the report card was sent via SwissSalary Direct, an error message occurred saying the date was invalid. This bug has been fixed.

1.9.6   ISO file with QR account | Multiple QR recipients

Task #11623 | 5059.003

If there were more than 3 QR bank accounts in an ISO payment file, this was rejected as invalid. This error has been corrected, so both a single account and multiple QR payment accounts can be processed in the same ISO file.

1.9.7   Payment order | QR invoice integrated

Task #11483 | 5059.001

If bank details with the QR invoice payment method were entered for employees, this payment was missing in the "Payment order (summarized)" report. This has been corrected and the Payment order (summarized) report now shows the same total as the Payment order (detailed) report.

1.9.8   Cancel Payroll | Reversal lock message

Task #11657 | 5060.000

If a pay process is to be canceled after the payment file has been generated, the reversal lock must be reset first. The old message asking to contact the administrator has been changed. The reversal lock can be reset directly by the user. We draw your attention to the fact that pay process should only be canceled after the payment has been made in really justified exceptional cases.

1.9.9 Payroll List | Reset EasyRapport

Task #11519 | 5060.000

EasyRapport transfer can be reset or set again in the Payroll List by showing the "Reset EasyRapport" and "Set EasyRapport" fields. Up until now, all pay processes would have been reset if no filter had been used. Only the marked wages in the pay process list are now reset or set.

1.10   Modern Client

1.10.1   SwissSalary Bau | Cloud

Task #11052 | 5060.000

We are very pleased by the fact that SwissSalary BAU can now also be used in the cloud. We keep in touch with all construction customers to accompany the migration.

1.10.2   REST API | Cloud Essentials

Task #11395 | 5060.000

With the latest version of Cloud Essentials, the REST API pages were taken over from the WEB PTE to the Cloud Essentials app.
All REST API web services have been taken over.

The old WEB PTE is no longer being developed by SwissSalary and can be removed by customers after they have successfully switched to Cloud Essentials.
Only the URL has to be changed for the transition from v1.0 to v2.0.

1.10.3   Cloud Essentials | Additional API table

Task #11708 | 5060.000

New API pages have been created and will be available to our customers with the next Cloud Essentials release.
New API pages list:
- translations
- swisssalaryContacts

1.10.4   Cloud Essentials | Personnel file as API page

Task #11681 | 5060.000

Two API pages have been created and will be available to our customers with the next Cloud Essentials release.
- documents --> displays document types. It should be mentioned here that no document types are displayed by default before the newly created "Publish to API Page" field is set to "yes". This prevents medical certificates or other sensitive data from being available in the interface without the release of these document types by the SwissSalary user.
- employeedossiers --> Displays all file documents assigned to a document type published for API Pages. Documents marked as "Private" are not exported in the API.

1.10.5 Rexx interface | Bookmarks setup page

Task #11661 | 5060.000

SwissSalary has an interface to 'Rexx HR Software'. Up until now, it could only be retrieved via Payroll master data. The setup page now also appears in the search. This is only possible for cloud customers (AL) and does not affect customers with installed versions (onPrem).

1.11 Employee

1.11.1 TimeMachine | Department

Task #11491 | 5059.001

No selection list of the stored departments could be retrieved for the Department field in TimeMachine. This bug has been fixed.

1.11.2 TimeMachine | linked fields

Task #11481 | 5059.001

When a TimeMachine value was entered in the Employee card – tab Salary (e.g. Salary amount), the linked fields (e.g. Salary rate) were not updated or set to 0.00. This bug has been fixed and TimeMachine works perfectly again.

1.11.3 TimeMachine | View

Task #11726 | 5060.000

When an entry was made in TimeMachine, the entire list was automatically displayed when the list for the "Value" field was opened and the entered value had to be searched for in the list for verification. Now, when the list is opened, the value defined in the field is automatically displayed in the list. This prevents unnecessary scrolling.

1.11.4 TimeMachine | Linked fields note

Task #11643 | 5060.000

When the ZIP code field is changed via TimeMachine, a message appears that the tax location, tax location ZIP code and the tax canton will also be adjusted similar to the new ZIP code. In addition, withholding tax canton at the moment of entering a foreign ZIP code is based on the workplace entered in the personnel card. The settlement and the country code must also be added manually when entering a foreign ZIP code (via direct entry in the Personnel card or via TimeMachine).

1.11.5 TimeMachine | Change of Valid from

Task #11565 | 5060.000

When an address is changed via TimeMachine, various fields are linked. If the Valid from date was subsequently changed, this changed the values. This error is corrected.

1.11.6 Direct registration Code | Suppression on Payslip

Task #11448 | 5059.001

A new field "Suppress SwissSalary Direct registration code" has been added in the Employee card in the General tab. If this field is active, the registration code will not be displayed on the payslip. This field can also be viewed in the pay process list, edited and changed for the desired pay process.

1.11.7 Employee card | Canton and Country code fields

Task #11711 | 5060.000

The canton and country code fields in the Employee card have been moved directly to ZIP code and location. The fields ZIP code and Settlement as well as ZIP code of municipality and Settlement of municipality are arranged in a more differentiated way for better overview.

1.11.8 Employee Card | Semi Families

Task #11472 | 5059.001

A test was rolled out with update 5059.000 as part of Swissdec 5.0. The single-parent family selection was linked to the Concubinage field. This was corrected.
When a IT rate is selected, the selection must be made in the Semi Families field. The selection is based on the requirements of the Swissdec guidelines. If this is the case, the selection for common-law spouse can also be set to 'yes'. Even then, a selection must be made for single-parent family.
The inclusion in the IT transfer takes place after implementation and certification according to Swissdec 5.0. To provide support in checking the rate classification, we have published FAQs under Single-parent families FAQ.

1.11.9 Employee Card | Negative AHV wage reporting date

Task #11724 | 5060.000

There is a new field in the Employee card: "Negative AHV salary reporting date". If there is an negative wage in the current year, a date must be entered here by when the employer will clarify with the AHV compensation office the way the distribution over previous years should be carried out. By default, this field is not displayed in the Personnel card, since the following constellation rarely occurs. If required, the field must be displayed via "Personalize" or "Customize this page".

Excerpt from the Swissdec 5.0 guidelines:
The settlement of an insurance benefit for the previous year and the settlement year in connection with a resignation results in a negative AHV wage.
Due to this constellation, a negative AHV wage is submitted to the compensation office with the annual report. Negative posting to the individual account (IK) of the person concerned is not possible and a correct distribution of the insurance benefit over the corresponding years is only possible after consultation with the company.

1.11.10 Employee list | Status filter triggers errors

Task #11505 | 5059.001

The filter automatically set for the status blocked the search for employees in the Employee list in French. We were able to fix this by removing brackets in the translation.

1.11.11 Employee templates | Allocation Group filter

Task #11418 | 5059.001

The Allocation Group filter now also applies to Employee templates.

1.11.12 Employee templates | Personnel dimensions

Task #11417 | 5059.001

New personnel dimensions can be stored in the Employee template provided during the creation of new employees.

1.11.13 Infobox | Employee dossier

Task #11436 | 5060.000

The Employee dossier fact box is available for the personnel file and can be displayed in the personnel list or in the personnel card. The saved documents can now be sorted by date so that the most recent document can also be displayed at the top. The Date created and Time created columns can be added via Personalize. The sorting must be carried out again each time; it is not saved.

1.11.14 Employee salary entry | Domain of origin

Task #11486 | 5060.000

With Swissdec 5.0, there is a change in the insurer's responsibility in the case of subsequent payments. To allow these to be transferred to the previous fund, two new fields have been added to the salary entries. For salary runs that are accounted for as of this update, you can display the columns Domain of origin and Domain of origin code within the salary entries. This means you can see to which insurance domain the salary entry is assigned and which insurance contract is applicable.

1.11.15 Employee salary entry | Domain of origin

Task #11755 | 5060.000

This is more of a technical change and is also related to Task 11753 and Task 11756. In order to be able to determine a possible change of the AHV or FAK compensation fund, the geographical origin code is now saved to wage items. The KIZU settings can be different for our customers. The "Contract" field in the KIZU settings (Payroll Setup, KIZU settings) can contain a value or be empty.
- If the "Contract" field is filled in in the KIZU settings, the "Contract" field value (Payroll Setup, KIZU settings) is saved in the "Geographical origin code" wage items field during wage calculation.
- If the "Contract" field in the KIZU settings is not filled in, it is assumed that the AHV and FAK compensation office is the same. This means that the "AHV contract" field value (Payroll master data, tab AHV) is saved in the "Geographical origin code" wage item field during wage calculation.

1.11.16   Employee bank | ESR payment slip no longer supported

Task #11654 | 5059.003

As of September 30, 2022, the Swiss banks no longer accept payments with ESR (payment slip with reference numbers). Make sure that there are no ESR payments for your employees in the banks. This has often been the case particularly with payments to debt enforcement offices.

Open any employee, click on the stored banks and clear the filter on the employee number. You can then see all of the banks stored for all employees. Then check whether there is an ESR payment stored for an employee, delete it and enter a new QR payment.

1.11.17   Employee Dossier | Raport card document type

Task #11480 | 5060.000

The report card is reassigned in the file to the document type set up in the documents.

1.11.18   Personell file | Document type

Task #11730 | 5060.000

The "Document type description" column can now be displayed in the Personnel file. It is possible this way to see which document types individual documents are assigned to, even in a minimized (collapsed) view of the file structure.

1.11.19   Human Resources | Career

Task #11712 | 5060.000

The 'Career' item can now be launched directly from Human Resources in the Employee card. This way, the access to and recording of previous positions are simplified. This feature is only active when Human Resources is linked and enabled.

1.12   SwissSalary EasyRapport

1.12.1   EasyRapport transfer | Cost centers after posting

Task #11510 | 5059.001

Only affected SwissSalary BAU solution customers.

After the transfer of the posted pay process, the lines reported to a cost center were no longer displayed correctly in EasyRapport.
The values were imported correctly if transferred for pay process from EasyRapport. The display was incorrect until exported after processing in SwissSalary.
This bug has been fixed.

1.12.2 EasyRapport | Cross-client license validation

Task #11490 | 5059.001

With user restrictions for clients, an error message occurred during data import because the license validation could not be carried out correctly due to missing access privileges.
Cross-client validation has been improved. As a user, you do not need to take any action.

1.12.3 EasyRapport settings | Field RFID

Task #11736 | 5060.000

The existing 'RFID' field in the SwS EasyRapport settings has now been configured in a way that the 'RFID' field in the Employee card can only be edited if the "RFID" field in the EasyRapport settings is activated correspondingly.

1.12.4 EasyRapport | XML-Debugging

Task #10164 | 5060.000

When XML debugging is activated for all clients (Web / Windows), a ZIP archive with all XMLs can be downloaded at the end of the transmission.

1.13 SwissSalary Direct

1.13.1 Documents to Direct | Error message

Task #11560 | 5059.003

When uploading documents to SwissSalary Direct, an error message occurred if there were no documents available to display. This was the case if all employees were registered for SwissSalary Direct and therefore no documents needed to be printed. This error has been corrected.
Now, if all documents can be sent to SwissSalary Direct, the system displays a notification that there are no more documents available for display.
If not all documents can be sent to SwissSalary Direct, the system displays those that could not be uploaded.

1.14 SwissSalary NSP

1.14.1 Absences submission | Percents by position change on personnel position via TimeMachine

Task #11651 | 5060.000

Concerns only the NSP application (public administrations):
If the automatic 'Absences submission' is activated in the payroll setup, public holidays defined in the work calendar, for example, are automatically entered in a Report journal (system journal) and transmitted to EasyRapport. For this purpose, target hours are used as a number (e.g., at 100% percents by position = 8 hours / at 50% = 4 hours). Up until now, a change in percents by position via TimeMachine in the HR department was not taken into account. We have now been able to correct this. TimeMachine entries of percents by position are now taken into account. If an entry is made in TimeMachine for percents by position, relevant public

holidays (from the TimeMachine entry start date) are updated accordingly in the Report journal (system journal).

1.14.2 Hourly wage personnel positions | IT rate-determining income

Task #11636 | 5060.000

Concerns only the NSP application (public administrations):
There are several personnel positions in the SwissSalary NSP application. There was a calculation error for other income in the case of employees subject to income tax and working in several positions on an hourly wage basis. This error was corrected. The level of employment is determined for each hourly wage personnel position using the applicable monthly parts. These values are then used to calculate the total level of employment.

1.14.3   Back payment | Overtime

Task #11705 | 5060.000

Concerns only the NSP application (public administrations):
Up until now, in the event of a back payment after resignation over- and undertime was incorrectly posted based on the workgroup settings. We have now been able to fix this. Over- and undertime is no longer posted in the event of a back payment.

1.14.4   EasyRapport login | Validity of personnel positions

Task #11620 | 5060.000

Concerns only the NSP application (public administrations):
In certain constellations, employees with several personnel positions did not have the right personnel position at choice for reporting in EasyRapport. The reason was that the "Valid from" and "Valid until" fields of personnel positions were not always correctly taken into account during EasyRapport transfer. We have now improved this.

1.15   Technical partner and customer information

1.15.1   Upgrade | Step by step upgrade replaced

Task #11757 | 5060.000

It is now possible to upgrade from any version to any higher version without taking intermediate steps. When a higher version is being installed, all necessary upgrade steps are carried out automatically (AL; BC19 – BCxx). The same also applies to C/AL (NAV2017 – BC14), where the upgrade must be started as before by opening Organization, Personnel card or by manually executing the Update code unit.

Important: Up to version 5058.000, each individual version must still be installed and the upgrade must be carried out, only then any higher version can be installed.

1.15.2   Events integration | SwS process payroll report

Task #11740 | 5060.000

Two new events that are required for entering a new customer via their partner have been added to wage accounting and are available by default.

1.15.3   Events | Cost account posting

Task #11513 | 5060.000

Three events for our partners to adjust the standard behavior of the cost accounting posting are now provided with code unit 3009098 – SwS Cost Account Posting:
* OnBeforePrepareForCostAccountPosting
* OnBeforePostCostJournalTempRecords
* OnBeforeWriteCostAccountRecord

1.15.4   Payslip | Permissions error alert

Task #11580 | 5059.002

Only affects customers owing the basic license in on-prem solutions (Dynamics NAV 2018 / Dynamics NAV 2017 / Dynamics NAV 2016 / Dynamics NAV 2015 / Dynamics NAV 2013 R2 and Dynamics NAV 2013)

With update 5059.001, a new feature was implemented, which allows not to print the Direct registration text on the payslip.
However, the function responsible for verification was in the Plus module section. Therefore, SwissSalary customers with the basic license received an error message when creating payrolls. SwissSalary Direct cannot be used with the basic license.

With Hotfix 5059.002, this error message has been eliminated and the payroll can now be created independently of the license without any problems.

1.15.5   Basic license | TimeMachine error message

Task #11648 | 5059.003

This applies only to customers with a Basic license in on-Prem solutions (Dynamics NAV 2018 / Dynamics NAV 2017 / Dynamics NAV 2016 / Dynamics NAV 2015 / Dynamics NAV 2013 R2 and Dynamics NAV 2013).

When entering a mutation in TimeMachine, an error message was displayed and it could not be entered. This error has been corrected.

1.15.6   SwissSalary Store | Bank master data

Task #11457 | 5060.000

Bank groups selection in the bank master / bank directory table has been updated according to the SIX Group specifications.

2 Update 5060.000 (03.11.2022) | Systemadmin

2.1 SwissSalary-Website | 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 Quality Releases (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.

Furthermore, we have created a helpful reference portal in the form of the SwissSalary Frequently Asked Questions (FAQ) page, which we continue to expand.

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 B5058.000 (BAU) / N5058.000 (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 B5058.000 / N5058.000 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.

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 / Quality Release.

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
5060.000	3049216	All	SwS Secret Value
5060.000	3049217	All	SwS Upgrade Tag
5060.000	3049218	All	SwS Upgrade Tag Backup
5060.000	3049219	All	SwS Document Rectificate
5060.000	3049221	All	SwS ELM Dialog
5060.000	3049222	All	SwS ELM Dialog Line

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).