SwissSalary® Learn

Update 5063.002

Swisssalary

Microsoft

swissdec
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Legal information

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1 QualityRelease 5063.002 | User

1.1 QualityRelease 5063.002 [5061.202] | Einleitung

Dear SwissSalary customers
Dear SwissSalary partners

This QualityRelease contains adjustments and corrections for customers who are already on SwissSalary version 5063.000 or higher.

Two task has been implemented as 5061.202 and is available for the corresponding versions.

For further information on the content of versions 5063.000 / 5063.001 and 5061.200 / 5061.201, please refer to the corresponding manuals.

The customer is responsible for carrying out the SwissSalary updates. Our support or your Dynamics365 partner can assist you if required. This responsibility also lies with the customer for SwissSalary365 (Cloud) and SwissSalary does not carry out updates automatically.

Your SwissSalary team

1.2 Downgrade | 5061.202

Release 5061.202 is published for the NAV / BC versions for which no full updates have been available since 5062.000 but for which individual tasks are still provided.

These are:
Dynamics 365 Business Central Spring' 19 - Version 14 (C/AL)
Dynamics 365 Business Central Fall' 18 - Version 13 (C/AL)
Dynamics NAV 2018
Dynamics NAV 2017

The following task is included in 5061.201 in this manual:

Salary declaration
- 12766   Declare Salary | Income tax back payments

Payroll
- 12656   Income tax | rate correction annual cantons

1.3 Employee

1.3.1 Employee card | Liechtenstein nationality

Task #12845 | 5063.002

With 5063.000, an adjustment was made so that no residence permit has to be assigned to persons with Liechtenstein nationality.

This is being reversed as no uniform handling is apparent and Swissdec has not provided any explanations in the guidelines.
If there is no residence or cross-border commuter permit, the selection can be set to Other (non-Swiss).

1.3.2   Employee card | BVG fictitious salary

Task #12817 | 5063.002

For salary changes on the Employee card, the message for the adjustment of the value in the 'BVG fictitious salary' has been adjusted. It is now again possible not to have the BVG salary notionally adjusted in the event of a salary change.
An adjustment can be selected with validity from the current month or retroactively.

1.3.3   Employee card | EasyRapport Visa

Task #12801 | 5063.002

50 characters can now be entered on the Employee card in the EasyRapport tab in the Employee visa and Substitute employee visa field.

1.3.4   Copy Employee | Personal Image

Task #12867 | 5063.002

The image is now also copied when the Employee card is copied to another client. An error message occurred when making changes to the copied Employee card, which has now been resolved.

1.3.5   Employees Image | Delete image

Task #12858 | 5063.002

An authorization error message occurred when deleting personnel images. This has been fixed and it is now possible to delete images from the personnel list or from the Employee card.

1.4   Payroll

1.4.1   Income tax | rate correction annual cantons

Task #12656 | 5063.002

In the case of retroactive rate corrections in annual cantons with a start date of January 1 or entry month, corrections were displayed as lines on the payslip that were not correct. This has been rectified.

1.5   Reports

1.5.1   Paycheck | Remark with %

Task #12861 | 5063.002

Only affects customers with SwissSalary Basis:
Remark texts were not taken into account for payroll accounting if a % sign was included. This could be corrected.

1.5.2 Absence List | Sorting

Task #12786 | 5063.002

The reports 'Absence list A4P' and 'Absence list A4L' can now be created sorted by personnel number.

1.5.3 Attestation of Employer ALV | 13th Payday

Task #9402 | 5063.002

If the 13th Payday is settled in a subsequent payment after leaving the company, this is also taken into account for the Attestation of Employer ALV.

1.5.4 Income tax report | Accounting number

Task #12812 | 5063.002

If the Income tax reports are generated both monthly and annually via the salary reports page, the payroll numbers of the cantons are now also displayed again.

1.6 Salary declaration

1.6.1 Declare Salary | Tax at source

Task #12766 | 5063.002

The transmission of additional payments for cantons with annual calculation was adapted in cooperation with Swissdec.

1.6.2 Declare Salary | Tay at source correction

Task #12749 | 5063.002

The time period for which retroactive corrections are taken into account has been extended.

1.7 Administration

1.7.1 Payroll Setup | Domain IT

Task #12849 | 5063.002

The Income tax canton fields under Payroll Setup (reference commission, median wage, etc.) are now always updated in all clients when importing rates, not just in the currently active client.

1.8 KLE

1.8.1 KLE | Deputy

Task #12829 | 5063.002

The details of a deputy can be stored in the system as additional information. As a rule, this is a fiduciary office. The delegate (deputy) is a third party appointed by the company (e.g. trustee, broker, etc.) who transmits the event report on behalf of the company using a Swissdec-certified ERP system and, depending on the order and agreement with the company, acts as the contact person for all matters relating to the event.
in connection with the event.

1.8.2 KLE | Annual salary for less than monthly employment

Task #12791 | 5063.002

The calculation of the total annual salary for entries during the month has been improved.

1.8.3 KLE | Confirmation of case closure

Task #12538 | 5063.002

When the case has been closed by the insurance company, we receive a message and the status in the insurance details is set to 'Communication ended'. Receipt of this status is confirmed to the insurance company with a final synchronisation.

1.8.4 KLE | Locked Working Group

Task #12847 | 5063.002

If the incident date is in a payroll run in which a locked Working Group was also written, the KLE message can still be transmitted.

1.9 SwissSalary Budget

1.9.1 SwissSalary Budget | Function in structure

Task #12865 | 5063.002

The Function column can now be displayed and edited in the structure.

1.9.2 SwissSalary Budget | Posting Group Forecast

Task #12853 | 5063.002

The Posting group is now also written in the forecast so that data also appears in the schema matrix with booking group filters on the structure.

1.10　Technical Information

1.10.1　Records Employee Change Log | Retention Policy

Task #12833 | 5063.002

Some customers have reported having a large number of records in the Employee Change Log table. In many cases, this is caused by integrations or synchronizations with other services. If this table grows too large, it can impact the system performance. To help maintain the size of this table, a retention policy can now be added, which will automatically delete records from the table based on user-specified criteria. For more information about setting up retention policies in Business Central, go to this article on Microsoft Learn: https://learn.microsoft.com/dynamics365/business-central/admin-data-retention-policies.

2   Update 5063.002 | 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://learn.swisssalary.ch/EN/.

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 communicate on various channels, e.g. Viva Engage (SwissSalary Partner Network), via newsletter, 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://learn.swisssalary.ch/EN/.
❑Please check with your Dynamics 365 partner whether you have made any custom adjustments. They would be lost after an update without prior backup.

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 Employee menu item (Employee 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   Authorization rates

From 5062.000, the SWS authorization sets are automatically updated directly with the update migration process. There is no "NAV permissions" section in the SwissSalary Organization anymore and the store update for the sets of rights no longer has to be carried out manually. You can identify an SWS set of rights delivered by us by the "System" type. They can no longer be adjusted by a SUPER user. If you want to create your own access privileges, you must copy a set of rights, make changes to the copied set of rights and assign them to relevant users (we have always recommended this procedure). A copied set of rights is automatically assigned the "Custom" type.

Code so far	New authorization rate	Name	Art	Extension name	Description
SWS-BUDGET-EDIT	SWS BUDGET PROCESS	Budget - Edit and Process	System	SwissSalary 365	This set of rights is used to create budget structures, FTE budgets, budgets in amounts and forecasts.
SWS-BUDGET-READ	SWS BUDGET READ	Read Budget Data	System	SwissSalary 365	This set of rights is used to read budget structures, FTE budgets, budgets in amounts and forecasts.
SWS-BUDGET-SETUP	SWS BUDGET SETUP	Admin. Budget Module	System	SwissSalary 365	This set of rights is used for setup in the SwissSalary Budget module. Classical set of rights for wage administrators.
SWS-EE EDIT	SWS PROCESS	Employee Edit and Run Payroll	System	SwissSalary 365	This set of rights is the classical assignment for payroll personnel 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 setup.
SWS-EE READ	SWS READ	Read Employee Data	System	SwissSalary 365	Similar to the SWS PROCESS set of rights, with the exception that data can be viewed only, and not changed. Read-only rights.
SWS-HR EDIT	SWS HR PROCESS	Edit HR (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. A user with this set of rights can modify, delete and enter data in PIS.
SWS-HR READ	SWS HR READ	Read HR (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. Read-only rights.
SWS-HR SETUP	SWS HR SETUP	Admin.HR Module (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. A user with this set of rights can change settings in PIS. Classical HR wage administrator.
SWS-KLE EDIT	SWS KLE PROCESS	KLE - Edit and Process	System	SwissSalary 365	KLE cases can be edited with this set of rights. If this set of rights is assigned, the SWS PROCESS or SWS READ set of rights must also be assigned.
SWS-KLE READ	SWS KLE READ	Read KLE Data	System	SwissSalary 365	Similar to the SWS-KLE PROCESS set of rights, with the exception that data can be viewed only, and not changed. Read-only rights.

SWS-ALL	SWS LOGIN	Login Permissions	System	SwissSalary 365	The only set of rights that must be assigned to every SwissSalary user. The 'Wage accounting' 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, no data of the restricted clients can be seen.
SWS-POST	SWS POSTING	Payroll Posting	System	SwissSalary 365	In accordance with the SOX guidelines, payroll staff member is not allowed to 'post wages'. This set of rights can be assigned to a user in the FIBU that is exclusively responsible for wage posting. IMPORTANT: Of course, this user must also be activated in SwissSalary under Setup -> Setup -> Users or in the RTC version under SwissSalary Administration -> SwissSalary User Setup.
SWS-ST EDIT	SWS SALARY TYPE EDIT	Edit Salary Types	System	SwissSalary 365	Full access for editing salary types. With this set of rights, salary types can be created, modified and deleted.
SWS-SETUP	SWS SETUP	Admin. SwS Module	System	SwissSalary 365	Classic set of rights for wage administrators.
SWS-SETUP-LIGHT	SWS SETUP LIGHT	Admin. SwS Without User Setup	System	SwissSalary 365	The same set of rights as SWS-SETUP with the restriction that SwissSalary users cannot be changed.