



Swiss[®] Salary **Learn**

Update 5064.000

Date: 14.11.2024
More information: learn.swissalary.ch



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Date of change: 14.11.2024

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Index

1	Update 5064.000 User	
1.1	Update 5064.000 Introduction	7
1.2	Downgrade 5061.300	8
1.3	Benefits New possibilities	8
1.4	Employee	9
1.4.1	Employee list Text overflow error message	9
1.4.2	Personnel card Registration code suppression ToolTip	9
1.4.3	Employee card Reason for resignation mandatory field	9
1.4.4	Employee card Liechtenstein nationality	9
1.4.5	Employee card Work Permit	9
1.4.6	Employee card TimeMachine function	10
1.4.7	Employee card Employment %	10
1.4.8	Employee card BVG fictitious salary	10
1.4.9	Employee card Message BVG fictitious salary	10
1.4.10	Personnel card Life partner data	10
1.4.11	Employee card Field Single Parent	10
1.4.12	Employee card Other occupations field	11
1.4.13	Employee card Workdays in CH field	11
1.4.14	Employee card Cross-border commuters France new fields	11
1.4.15	Employee card EasyRapport Visa	11
1.4.16	Employee bank QR IBAN	11
1.4.17	Personal Bank Delete QR IBAN	11
1.4.18	Personnel statistics Assignment	12
1.4.19	Copy Employee Personal Image	12
1.4.20	Employees Image Delete image	12
1.4.21	Infobox Personnel Dossier Restrictions on document management	12
1.5	Payroll	12
1.5.1	Payroll Iteration for net wages	12
1.5.2	Month-shifted time processing Resignation	12
1.5.3	Payroll Calculating percents by position without BVG adjustment	13
1.5.4	Salary type with calculation approach and factor Cost center	13
1.5.5	Income tax rate correction annual cantons	13
1.5.6	Income tax retroactive rate correction with additional wage run	14
1.5.7	Income tax Back payments after leaving	14
1.5.8	SPS ISO 2022 Standard conversion with new scheme	14

	1.5.9	Payroll Files in Factbox	14
	1.5.10	Post Payroll Error message Costs entry journal	14
1.6		Reports	14
	1.6.1	Paycheck Remark with %	14
	1.6.2	Paycheck E-Mail	15
	1.6.3	Salary certificate Bar code	15
	1.6.4	Salary certificate DocID	15
	1.6.5	Salary certificate Rectified	15
	1.6.6	Supplement Austrian employees in Liechtenstein	15
	1.6.7	Salary Type List A4L Sort Key	16
	1.6.8	Report Employee Statement Sorting key	16
	1.6.9	Employee Salary Statement A4L Headcount	16
	1.6.10	Salary account Fictitious salary types	17
	1.6.11	Absence List Sorting	17
	1.6.12	General Ledger Log Selection of last payroll run	17
	1.6.13	Remuneration change log Sample data in Excel	17
	1.6.14	Account reconciliation Output to Exel	17
	1.6.15	Management Rapport Month translation	17
	1.6.16	Visa control Execution in empty journal	17
	1.6.17	History report IT calculation date	18
	1.6.18	Employee list Partner's residence permit	18
	1.6.19	Attestation of Employer ALV Section 21 description	18
	1.6.20	Attestation of Employer ALV 13th Payday	18
	1.6.21	Attestation of Employer ALV Bonus	18
	1.6.22	Attestation of Employer ALV Reason for resignation	18
	1.6.23	Attestation of Employer ALV International Other payments	18
	1.6.24	Tax at Source Filter Allocation Group	19
	1.6.25	Income tax report Accounting number	19
	1.6.26	Mail Merge Direct registration code	19
	1.6.27	Mail Merge Filter function enhancement	19
1.7		Salary declaration	19
	1.7.1	Declare Salary Tax at source	19
	1.7.2	Declare Salary Tax at source correction	19
	1.7.3	Declare Salary Income tax date error	19
	1.7.4	Swissdec 5.3 Cross-border commuters for France	20
	1.7.5	Statistics Working hours Hourly wage	20
	1.7.6	Wage report XML file Standard version	20
	1.7.7	BVG Declaration Feedback	20
	1.7.8	BVG Declaration View response	20
1.8		Interfaces	21

1.8.1	Salary data import via Excel Empty values import	21
1.8.2	Salary data import via Excel Percents by position adjustment	21
1.8.3	SmartPort Statistics Education	21
1.8.4	UKA 8.9 SIMIC	21
1.9	Administration	21
1.9.1	Role center My personnel Document import	21
1.9.2	Role Center Shortcuts	21
1.9.3	Payroll Setup Last weekday	22
1.9.4	Salary type card Statistics	22
1.9.5	Payroll Setup Domain IT Setup	22
1.9.6	Payroll Setup Domain IT	22
1.9.7	Payroll Setup ToolTipp UID-N°	22
1.9.8	Payroll Setup Posting fields	22
1.9.9	Payroll Setup Job Journal Template	22
1.9.10	Payroll Setup Decimals ToolTip	23
1.9.11	Contact Card First and last names	23
1.10	KLE	23
1.10.1	KLE Stable hourly wage in the Payroll Setup	23
1.10.2	KLE Deputy	23
1.10.3	KLE Annual salary for less than monthly employment	24
1.10.4	KLE Confirmation of case closure	24
1.10.5	KLE Locked Working Group	24
1.10.6	KLE Wage details Claims notification	24
1.10.7	KLE Mark as closed	24
1.10.8	KLE Claim reporting without wage data	24
1.11	SwissSalary Budget	25
1.11.1	SwissSalary Budget Function in structure	25
1.11.2	SwissSalary Budget Posting Group Forecast	25
1.11.3	SwissSalary Budget Allocation Group	25
1.11.4	SwissSalary Budget Forecast calculation	25
1.12	SwissSalary EasyRapport	25
1.12.1	Work Calendar Import Compensation time	25
1.12.2	Rapport Types Field minimum break	25
1.12.3	EasyRapport Date block	26
1.12.4	EasyRapport Cross-client check Login	26
1.12.5	EasyRapport Get EasyRapport Entry	26
1.12.6	EasyRapport Balances for unposted wage transfer	26
1.12.7	EasyRapport Holiday display for resignation	26
1.12.8	EasyRapport Extension data transfer	26

1.12.9	EasyRapport Action link	27
1.13	SwissSalary Direct	27
1.13.1	Direct synchronization Send documents	27
1.13.2	Report card Direct and file	27
1.14	SwissSalary Construction	27
1.14.1	Reporting Device name	27
1.14.2	Dimensions EasyRapport	27
1.14.3	ARGE report Missing customer number	27
1.15	Technical Information	28
1.15.1	Process Pay raise	28
1.15.2	Records Employee Change Log Retention Policy	28
1.15.3	Event Employee Dimensions Wage accounting	28
1.15.4	Permissions Indirect permission for Payroll Log Overview	28
1.15.5	REST API Allocated Salary Line No.	28
1.15.6	REST API Department fields missing	29
1.15.7	REST AP I new field	29
2	Update 5064.000 Systemadmin	
2.1	SwissSalary-Website Objects and app download	30
2.2	Importing/updating Updates and Hotfixes	31
2.3	Authorization rates	32
2.4	Role Profiles	35

1 Update 5064.000 | User

1.1 Update 5064.000 | Introduction

Dear SwissSalary Customers,
Dear SwissSalary Partners,

We present to you the manual for SwissSalary **Update 5064.000** of November 14, 2024. It also includes documentation on QualityReleases from 5063.001 to 5063.003. 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 KLE.

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 [swissalary.ch](https://www.swissalary.ch).

IMPORTANT NOTES

Basic requirement

If your Dynamics 365 partner has made 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.

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 **Update 5064.000** is available for the Business Central versions (onPrem/private cloud) below:

- o Dynamics 365 Business Central 2024 Wave 2 - Version 25 (AL)
- o Dynamics 365 Business Central 2024 Wave 1 - Version 24 (AL)
- o Dynamics 365 Business Central 2023 Wave 2 - Version 23 (AL)

We always support the latest version in SaaS (public cloud by Microsoft). Therefore, we release SwissSalary Update 5064.000 for BC 25. Please note that the existing sandboxes must also be migrated for 5064.000 to be installed.

Legal changes and mandatory bug fixes will be provided for these versions in the form of **Release 5061.300**:

As already announced in the last update manuals, this release will not be provided for the versions below:

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

They are noted accordingly in this manual. Technical or content-related innovations for these versions will not be implemented in SwissSalary. To update your environment, please contact your NAV/Dynamics365 partner.

Customers are responsible for implementing SwissSalary versions. Our Support or Your Dynamics365 partner can provide help if needed. With SwissSalary365 (Cloud), customers are also responsible for this and SwissSalary does not carry out any updates automatically.

Stay tuned for Release 5064.000.

Your SwissSalary Team

1.2 Downgrade | 5061.300

Release 5061.300 is published for the NAV / BC versions for which full updates are no longer available from 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 tasks are included in 5061.300 in this manual:

Personnel

- 12788 Personnel Bank | QR IBAN

Reports

- 12972 Salary Certificate | DocID

Salary declaration

- 12766 Salary declaration | Income tax back payments
- 12953 Salary declaration | Income tax date error

Payroll

- 12656 Income tax | rate correction annual cantons
- 11809 Income tax | retroactive rate correction with additional wage run
- 12011 Income tax | Back payments after leaving the company
- 11727 SPS ISO 2022 | Conversion standard with new schema

1.3 Benefits | New possibilities

| 5064.000

The Payroll Setup, in particular the area of social insurance, is being revised. In a first step, HI and UVGZ will be transferred to Benefits due to the comparable set-up conditions. The comprehensive documentation on benefits can be found in a separate manual, which is continuously being supplemented and updated. The implementation of the Benefits project will have an impact on several areas in SwissSalary. In addition to

the changes to the setup in Payroll Setup, it will also affect salary types, employee social insurance, wage notifications and annual statements.
With Benefit, the accrual of premium rates and insurance contracts will be possible. Stay tuned for further developments.

1.4 Employee

1.4.1 Employee list | Text overflow error message

Task #12965 | 5064.000

A text overflow message could occur for customers with a very large number of departments if a department filter was set for a user during SwissSalary user setup.

1.4.2 Personnel card | Registration code suppression ToolTip

Task #11980 | 5064.000

The tooltip for the 'Suppression of SwissSalary Direct registration code' field on the Employee card has been revised.

1.4.3 Employee card | Reason for resignation mandatory field

Task #12789 | 5064.000

If selection options have been entered in the 'Reason for resignation' table, the selection now appears automatically when a leaving date is entered.

1.4.4 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).

1.4.5 Employee card | Work Permit

Task #12814 | 5063.001

The displayed Work Permit names were not displayed correctly when selected. This trouble has been fixed and the familiar names for individual Work Permit are displayed again.

1.4.6 Employee card | TimeMachine function

Task #12696 | 5064.000

When working with numerical codes in the functions, it could happen that the wrong value was drawn when storing in TimeMachine. For example, when storing 30, 130 was drawn because the first digit is 1 lower. This has been corrected.

1.4.7 Employee card | Employment %

Task #12758 | 5063.001

Maximum number of Employment 100% can be stored in the Employee card. The same is checked now if Employment % are changed for the past or future via the TimeMachine field.

1.4.8 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.

1.4.9 Employee card | Message BVG fictitious salary

Task #12922 | 5063.003

The message for salary adjustments with regard to BVG salary fictive mutation and BVG salary effective mutation has been processed. In certain constellations with a BVG calculation date in the current month, the selection did not appear correctly

1.4.10 Personnel card | Life partner data

Task #11844 | 5064.000

The AHV number during partner data input has been rearranged so that it now only appears with show more.

1.4.11 Employee card | Field Single Parent

Task #9934 | 5064.000

The 'Single parent' field has been removed from the Employee card, as this is no longer relevant from Swissdec 5.0. Processing for persons subject to Income tax with a Semi Families rate is carried out via the 'Semi Families' field created for this purpose with the selection options.

1.4.12 Employee card | Other occupations field

Task #10053 | 5064.000

The 'Other occupations' field in the Private tab on the Employee card has been expanded, as it is no longer relevant as of Swissdec 5.0. Other income sources relevant for withholding tax are processed via the corresponding fields in the Withholding tax tab.

1.4.13 Employee card | Workdays in CH field

Task #10207 | 5064.000

With release 5063.000, Swissdec 4.0 functionality was removed and automatically updated to at least Swissdec 5.0.

The process of reducing the wage subject to withholding tax based on days spent abroad was redefined by Swissdec as part of the 2021 withholding tax reform and is processed via the fields created for this purpose in the Payroll Setup and in the reporting of days spent abroad.

Therefore, the Workdays in CH field is outdated and has now been removed from the Employee card.

1.4.14 Employee card | Cross-border commuters France new fields

Task #12592 | 5064.000

For cross-border commuters from France, four additional fields (Percentage of remote work, Temporary assignments in France, Temporary assignments abroad, Non-return days in Switzerland) are now available in the area of withholding tax.

1.4.15 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.

1.4.16 Employee bank | QR IBAN

Task #12788 | 5063.001 [5061.201]

A message about the lack of SIC participation of the derived clearing number was displayed when entering an IBAN QR.

There are now several options for SIC participation. They have been added now and, therefore, no message is displayed anymore.

1.4.17 Personal Bank | Delete QR IBAN

Task #12819 | 5064.000

A recorded QR-IBAN Personal Bank could no longer be deleted. This has been fixed.

1.4.18 Personnel statistics | Assignment

Task #12802 | 5064.000

The fields 'Employee N°', 'Employee name' and 'Personnel first name' can now be added to the 'Personnel statistics assignment' table.

1.4.19 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.

1.4.20 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.

1.4.21 Infobox Personnel Dossier | Restrictions on document management

Task #12920 | 5063.003

The restrictions set for department heads in the SwissSalary user setup are valid at all levels. For example, documents that the superior is not allowed to view are neither displayed in the "Employee dossier" fact box nor in the personnel dossier itself.

1.5 Payroll

1.5.1 Payroll | Iteration for net wages

Task # | 5064.000

Previously, 'Gross for net' could be activated on a salary type. This meant that the social security deductions were extrapolated and the social security contributions were processed via the employer salary types. This is now done via an iteration and via the net wage compensation. On the payroll run, the value is extrapolated so that the value calculated for this salary type results as the payment value after deduction of the social security deductions. The social security deductions are shown and processed as employee deductions and employer contributions according to the settings.

Net wage compensation is also available for daily allowance salary types, please refer to the entry in the general manual.

1.5.2 Month-shifted time processing | Resignation

Task #12937 | 5064.000

Period-shifted time accounting functionality has been redesigned.

Up to now, our customers who work with period-shifted time posting (Allocation Group - Period Start Day >0) have not been able to carry out the resignation process automatically. This is now to be changed with Update 5064.000. Until now, Allocated time from the previous month and the current month of resignation was combined in the month of resignation. Time items from both months were also added together. Since payroll managers often do not have all the time available up to the end of the month at the time of pay process, neither holidays nor flexitime can be correctly calculated and disbursed in the final pay process. This in turn affects the 14th Payday. In most cases, a manual calculation or an additional pay process was necessary.

The month of resignation is now also posted in periods with a shift. If the Allocation Group has the first day of the period >0 entered under the accounting method.

The steps are taken as follows using an example with resignation on October 31:

- Only September time data is processed in October. The resignation date is written to the pay process list as of October 31.
- October time items are processed in November.
- When 'Get EasyRapport Entry' is carried out, October items for the person who resigns are no longer automatically imported with the due date of September 30.
- The pay process after resignation now compares both target and current data and makes a difference posting.
- Automatic balance compensation upon resignation now also works in the pay process after resignation and can therefore be enabled.
- The portion of the 13th Payday is taken into account in the pay process after resignation from the company.
- Monthly wage as well as wage items or child allowances, etc. are NO longer taken into account in the pay process after resignation from the company.

1.5.3 Payroll | Calculating percents by position without BVG adjustment

Task #12598 | 5064.000

If Employment % for hourly wage earners are calculated monthly based on the hours worked, this no longer has any influence on the BVG wage and no corresponding message appears.

1.5.4 Salary type with calculation approach and factor | Cost center

Task #12727 | 5064.000

If a salary type is entered with a factor (further allocation = Employee card), the internal WV approach and the external WV approach are calculated correctly with the factor, even if a cost center is entered manually.

1.5.5 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.

1.5.6 Income tax | retroactive rate correction with additional wage run

Task #11809 | 5063.003 [5061.203]

Retroactive corrections resulted in incorrect calculations if more than one pay run was processed in a month. The additional pay runs were not taken into account correctly and the original deductions were not credited for the months prior to the additional pay run affected by the correction. This has been corrected.

1.5.7 Income tax | Back payments after leaving

Task #12011 | 5063.003 [5061.203]

In the case of persons who have left the company and are subject to Income tax in cantons with monthly accounting, several back payments with aperiodic benefits were not correctly included in the rate calculation.

This has been rectified.

1.5.8 SPS ISO 2022 | Standard conversion with new scheme

Task #11727 | 5064.000 [5061.300]

The ISO XML file has been adapted to a new, extended ISO 2022 schema with national and international ISO 2022 standards (SPS / SEPA / SWIFT).

1.5.9 Payroll | Files in Factbox

Task #12795 | 5064.000

If a file is created for posting to the external system due to the use of an interface, these posting files, which are stored in the factbox files in the posted payroll runs, can no longer be deleted.

1.5.10 Post Payroll Error message Costs entry journal

Task #12599 | 5064.000

The cost entry journal template to be used must be stored in the setup section of the payroll setup.

1.6 Reports

1.6.1 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.

1.6.2 Paycheck | E-Mail

Task #12657 | 5064.000

Field length for email address display has been extended.

1.6.3 Salary certificate | Bar code

Task #12805 | 5063.001

Due to an adjustment introduced by Microsoft, the bar code on the Salary certificate no longer appeared for people with umlauts or special characters in their first or last names. We were able to fix this trouble and the bar code is displayed correctly again.

1.6.4 Salary certificate | DocID

Task #12972 | 5064.000

When Salary certificate were generated, DocID was not clearly displayed on the PDF. This was corrected.

1.6.5 Salary certificate | Rectified

Task #12886 | 5064.000

When the 'Print rectified Salary certificate' function is used, the location, date and sender are filled in identically to the Salary certificate created.

1.6.6 Supplement | Austrian employees in Liechtenstein

Task #12411 | 5064.000

The 'Supplement for Austrian employees in Liechtenstein (cross-border commuters)' form is now included in SwissSalary. Before initiating the report, it must be entered in "General reports" using number 3009087. The parameters below must be entered on the request page.

- Date from: You can enter here the start date of the period for which the report is to be prepared.
- Date to: You can enter here the end date of the period for which the report is to be prepared.
- Salary type(s) that should be taken into account under the corresponding category can be entered in various salary type fields. Several salary types can be entered per category (e.g., 7000|8000|9000).

No salary type field is available on the request page for the categories or information below. This information is automatically recognized by the settings in the Payroll Setup or Salary types.

- Gross wage under Section 8 of the Salary certificate: The same logic is used for this category as for the Salary certificate/Pension statement report (Form 11)
- Less Sections 2-7: The same logic is used for this category as for the Salary certificate/Pension statement report (Form 11)

Note: If a salary type is in Sections 2-7 of the Swiss Salary certificate, it must not be entered on the request page.

- Gross wage under Section 1: The same logic is used for this category as for the Salary certificate/Pension statement report (Form 11)

- 13th Payday: The wage type set up in the 13th Payday ST field in the Base tab of the Payroll Setup is used for this category.
- 14th Payday: The wage type set up in the 14th Payday ST field in the Base tab of the Payroll Setup is used for this category.
- Hours in the Sunday and public holiday surcharge category: In order to use the number of hours, the "Number" field must have been filled in when these surcharges were disbursed. The number of the salary type entered on the request page for this category is used.
- Hours in the Overtime category: In order to use the number of hours, the "Number" field must have been filled in when these surcharges were disbursed. The number of the salary type entered on the request page for this category is used.
- The number of years of service in the Severance payments and Compensation at the end of the employment contract category: The years of service in the personnel master data are used for this information.
- AHV / IV / ALV / NBU: The salary types from the Payroll Setup below are used for this category:
 - tab AHV, field Employee AHV ST
 - tab ALV, Employee ALV ST
 - tab UVG, Employee NBUV ST
- Retirement insurance: Employee salary types of the BVG institutions from the payroll master data are used for this category.
- FL withholding tax for Austrian cross-border commuters: The same logic is used for this category as for the Salary certificate/Pension statement report (Form 11)
- Daily sickness benefits insurance: Employee salary types of the KTG institutions of the Payroll Setup are used for this category.

1.6.7 Salary Type List A4L | Sort Key

Task #12895 | 5063.003

In the 'Salary Type List A4L and A4P' reports, the 'Department/Search Name' setting in the 'Sort key' field triggered an infinite loop, which meant that the report could not be created and triggered an error message due to the maximum number of rows of 500'000 being exhausted. This error has been fixed and the reports can be executed with these settings.

1.6.8 Report Employee Statement | Sorting key

Task #12631 | 5064.000

The 'Sorting key' is now available for selection under Options in the Report Employee Statement.

1.6.9 Employee Salary Statement A4L | Headcount

Task #12885 | 5064.000

When the 'Recapitulation' is enabled, the 'Employee Salary Statement A4L' report now shows not only the calculated FTE, but also the headcount key figure at the end.

1.6.10 Salary account | Fictitious salary types

Task #12955 | 5064.000

When the 'Salary account' report was created with fictitious salary types, an error message appeared. We have now been able to correct this.

1.6.11 Absence List | Sorting

Task #12786 | 5063.002

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

1.6.12 General Ledger Log | Selection of last payroll run

Task #11928 | 5064.000

If the General Ledger Log journal is opened via the payroll run view, the most recent payroll run number is suggested. This is now also implemented in the same way when opened via the search function or if the General Ledger Log journal is bookmarked to the start page.

1.6.13 Remuneration change log | Sample data in Excel

Task #12926 | 5064.000

The demo data in the Remuneration change log report with output to Excel was deleted and the desired data is displayed as soon as processing is enabled.

1.6.14 Account reconciliation | Output to Exel

Task #12797 | 5063.001

The output to Excel no longer worked due to an adjustment. This trouble has been fixed..

1.6.15 Management Rapport | Month translation

Task #12882 | 5064.000

When creating the Management Rapport, the name of the month is printed in the language of the person.

1.6.16 Visa control | Execution in empty journal

Task #12382 | 5064.000

If the 'Visa control' report was retrieved in an empty report journal, it could not be generated due to an error message. This trouble has been fixed.

In order to be able to verify items in the EasyRapport import journal, it is necessary to be able to prepare this report in an empty report journal.

1.6.17 History report | IT calculation date

Task #12951 | 5064.000

The 'IT calculation date' field was hidden on the Employee card some time ago because it no longer has any influence on IT calculations during wage accounting. However, it still generated entries in the History report, which has now been fixed. The History report does not show any changes to the IT calculation date because it cannot be edited manually.

1.6.18 Employee list | Partner's residence permit

Task #12878 | 5064.000

The Employee list report now also includes life partner's residence permit.

1.6.19 Attestation of Employer ALV | Section 21 description

Task #12905 | 5064.000

When the Attestation of Employer ALV is created, the wording for section 21 'Other financial benefits' was adjusted to the form.

1.6.20 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.

1.6.21 Attestation of Employer ALV | Bonus

Task #12336 | 5064.000

If several salary types are selected for the information in section 17, the total of the selected salary types is printed.

1.6.22 Attestation of Employer ALV | Reason for resignation

Task #12816 | 5064.000

The text field for the 'Reason for resignation' in the Attestation of Employer ALV has been expanded and is now printed on several lines.

1.6.23 Attestation of Employer ALV International | Other payments

Task #12837 | 5063.003

The field 20.3 'Other payments' in the Attestation of Employer ALV international can be changed without an error message with abort sequence appearing.

1.6.24 Tax at Source | Filter Allocation Group

Task #12855 | 5063.003

When creating the Tax at Source statement, the filter criterion is applied to the Allocation Group and only those persons are displayed who have been assigned to the filtered Allocation Group.

1.6.25 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.

1.6.26 Mail Merge | Direct registration code

Task #12544 | 5063.001

The registration code for SwissSalaryDirect can now be selected in document templates for creating Mail Merge.

1.6.27 Mail Merge | Filter function enhancement

Task #12880 | 5064.000

Several persons can now be selected from the Employee list to create form letters. If one or no Employee number is selected, form letters will still be created for all employees displayed.

1.7 Salary declaration

1.7.1 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.

1.7.2 Declare Salary | Tax at source correction

Task #12749 | 5063.002

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

1.7.3 Declare Salary | Income tax date error

Task #12953 | 5064.000 [5061.300]

An error message occurred during Income tax reporting due to a date constellation. This was caused by a rare numbering of salary types, where the entitlement provision was the highest number. If there was no

entitlement provision in the last month of employment and there was a later back payment, the report could not be generated. This has been fixed.

1.7.4 Swissdec 5.3 | Cross-border commuters for France

Task #12610 | 5064.000

Due to the new agreement between France and Switzerland, an additional, individual cross-border commuter report must be submitted.

Annual declaration must be made for employees residing in France and whose usual place of work is in Switzerland and includes distance working. For more details on the requirements, see Swissdec guidelines 5.3.

1.7.5 Statistics | Working hours Hourly wage

Task #12750 | 5063.001 [5061.202]

When the statistics were transmitted, the hours worked for hourly-paid employees were exported based on the voucher date.

In the case of time-shifted processing with a voucher date in the previous month, this led to missing hours in the transmission. This has been corrected.

The hours according to the payroll date are always taken into account for the transmission.

1.7.6 Wage report XML file | Standard version

Task #12709 | 5064.000

When Declare Salary, the updated Swissdec version selected in the Payroll Setup is displayed in the transfer file.

1.7.7 BVG Declaration | Feedback

Task #12841 | 5064.000

Submission to BVG institutions will be further extended as part of Swissdec 5.3.

Individual data including the contribution values can be retrieved via View response during transmission. By clicking 'Show all fields', all data can be displayed and exported to Excel for verification.

1.7.8 BVG Declaration | View response

Task #12840 | 5064.000

Based on the response from the BVG-ELM transmission, two reports were developed that had not previously been used.

1.8 Interfaces

1.8.1 Salary data import via Excel | Empty values import

Task #12739 | 5064.000

Values for the Employee card can be imported for several people using Excel import. Existing assignments can also be deleted this way.

1.8.2 Salary data import via Excel | Percents by position adjustment

Task #12907 | 5064.000

If the workload is changed in a Employee card; whether directly or via TimeMachine, the Allocated time of the absences carried forward (automatic generation of public holidays) is automatically adjusted to the new percents by position in the corresponding reporting journal. If percents by position were changed via the 'Salary data import via Excel - 3009242' report, target time of the existing public holidays were not updated automatically. This trouble has now been corrected.

1.8.3 SmartPort | Statistics Education

Task #12811 | 5063.001

The SmartPort has been added. The OptionValues in the Education field have been implemented. There is a new SmartPort schema for Hotfix 5063.001 in the Hotfix directory (on the SwissSalary Sharepoint).

1.8.4 UKA 8.9 | SIMIC

Task #12860 | 5063.003

Instead of the previous ZAR number, the SIMIC number is now written into the UKA file

1.9 Administration

1.9.1 Role center My personnel | Document import

Task #12813 | 5064.000

Documents can now be more quickly assigned and imported to a personnel file directly in the Role center via 'My personnel' using drag & drop.

Multiple documents can be marked and imported simultaneously.

1.9.2 Role Center | Shortcuts

Task #12902 | 5064.000

You can now

- start a pay process via 'Alt + P' and
- retrieve payroll master data via 'Alt' + S' directly in the Role center

1.9.3 Payroll Setup | Last weekday

Task #12597 | 5064.000

Up until now, the last day of the week was stored in the Payroll Setup. This meant that the maximum weekly working hours could only be regulated uniformly for the whole client.

This field can now be found in the workgroup. This means that you can store individual weekly regulations.

1.9.4 Salary type card | Statistics

Task #12916 | 5064.000

Obligation designation in the salary type card has been adjusted. The field is now labeled 'Statistics'. The selection remains unchanged.

1.9.5 Payroll Setup | Domain IT Setup

Task #12720 | 5064.000

If the Income tax calculation type is changed, the following warning appears: 'The calculation type is specified by the cantons. The selection may only be changed in the event of legal changes.'

1.9.6 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.

1.9.7 Payroll Setup | ToolTipp UID-N°

Task #11156 | 5064.000

The tool tip for the UID numbers is now <https://www.uid.admin.ch>, as the UID EHRA-N° is displayed here in the correct format.

1.9.8 Payroll Setup | Posting fields

Task #12602 | 5064.000

In the Payroll Setup, the display of the posting options in the Facilities section has been improved. The additional setup fields are now only displayed if a transfer is made to the corresponding module. The posting facility for cost accounting and in the projects is only displayed if 'Show more' is selected.

1.9.9 Payroll Setup | Job Journal Template

Task #12600 | 5064.000

If the option 'Transfer to project' is activated in the Payroll Setup, the fields 'Project booking', 'Project cost price' and 'Project entry journal template' are displayed again.

The following default values are entered:

Project booking: Automatic

Project cost price: SwissSalary/Resource

Project entry journal template: this field is empty

1.9.10 Payroll Setup | Decimals ToolTip

Task #12734 | 5064.000

In the Paycheck tab of the Payroll Setup, tool tips are now displayed in the fields 'Decimals for deduction IT' and 'Decimals for calculation of time', which indicate the connection to the respective salary types and their rounding settings.

1.9.11 Contact Card | First and last names

Task #11494 | 5064.000

Companies and persons can be entered in the SwissSalary contacts. A first name can be entered in a separate field for individuals. The surname and first name can be displayed in the list view.

1.10 KLE

1.10.1 KLE | Stable hourly wage in the Payroll Setup

Task #12935 | 5064.000

If the 'Stable hourly wage' Boolean is enabled in the Payroll Setup, the annual wage of regular hourly wage earners is calculated and transmitted using the formula: weekly hours * hourly rate * 52 weeks. Holidays are already taken into account; if there is an entitlement to a 13th Payday, it is calculated based on the annual wage.

For hourly wage earners with irregular hours, the annual wage is submitted based on the last 12 months of pay or converted to 12 months if there are no 12 pay processes yet.

In both cases, the last months of pay processed before the month of event are decisive.

1.10.2 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.

1.10.3 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.

1.10.4 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.

1.10.5 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.

1.10.6 KLE | Wage details Claims notification

Task #12779 | 5063.001

The wage details are displayed correctly again on the claim report.

1.10.7 KLE | Mark as closed

Task #12916 | 5064.000

The 'Mark as closed' Boolean can be enabled in the KLE case card so that the case is moved to the 'Closed' tile before the insurance company reports back the 'Communication closed' status.

Cases moved in this way will continue to be regularly synchronized automatically until the insurance company reports the 'Communication closed' status. As soon as the process status in the case is 'Communication closed', the 'Mark as closed' Boolean can no longer be edited.

1.10.8 KLE | Claim reporting without wage data

Task #12345 | 5064.000

If a claim report is printed without wage data, the occupational status (management function) and the payroll data are not shown.

1.11 SwissSalary Budget

1.11.1 SwissSalary Budget | Function in structure

Task #12865 | 5063.002

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

1.11.2 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.

1.11.3 SwissSalary Budget | Allocation Group

Task #12536 | 5063.001

In the list 'SwissSalary Budget pay run open' and 'SwissSalary Budget pay run posted', the column 'Allocation Group' is now displayed by default. It is now possible to filter by Allocation Group in this list.

1.11.4 SwissSalary Budget | Forecast calculation

Task #12873 | 5064.000

The forecast can now also be calculated for hourly-paid employees. The expected percents by position according to the personnel card are taken into account (Percents by position and Monthly items fields must not be empty).

1.12 SwissSalary EasyRapport

1.12.1 Work Calendar | Import Compensation time

Task #10579 | 5063.003

The link to the download option for importing Compensation time (working calendar) has been adapted.

1.12.2 Rapport Types | Field minimum break

Task #11034 | 5064.000

For some time now, the 'Break deduction' type can be set up in the Rapport Types in order to take into account the statutory breaks in EasyRapport. This means that the 'Minimum Break' field (29) is no longer required.

In this task, the 'Minimum break' field was expanded in the EasyRapport group. In a further step, the function will be completely removed by SwissSalary EasyRapport.

1.12.3 EasyRapport | Date block

Task #12700 | 5064.000

The date lock for EasyRapport or TapBoard could be stored in the EasyRapport group. This defined for which system entries can be made for the period 'Bookings authorised from/to'.

As the date block for TapBoard is not used, this field has been removed. The 'Accounting authorized from/to' field is now only used for EasyRapport.

1.12.4 EasyRapport | Cross-client check Login

Task #12761 | 5063.001

If the employee login for EasyRapport is selected on the Employee card, there is no longer a check as to whether this is already being used in another client.

1.12.5 EasyRapport | Get EasyRapport Entry

Task #12815 | 5063.001

The 'Get EasyRapport Entry' function accessed all clients in the background, even if there was a client restriction. This has been fixed.

1.12.6 EasyRapport | Balances for unposted wage transfer

Task #12031 | 5064.000

If a pay process was open or unposted and a transfer was carried out, an entitlement was displayed for various times. However, entitlement display only makes sense for 'Holidays'. The system has now been adjusted accordingly.

1.12.7 EasyRapport | Holiday display for resignation

Task #12863 | 5064.000

Holiday balance was not displayed correctly by SwissSalary EasyRapport for employees with a set resignation date during an open pay process. This bug has already been fixed.

1.12.8 EasyRapport | Extension data transfer

Task #11857 | 5063.001

It has been implemented that the "Balanced" field (numbering of the time type field 'Balance Group') in the EmployeeInfo is sent to SwissSalary EasyRapport. In order to fully meet the requirements, SwissSalary EasyRapport now needs to make further adjustments. These can only be started once this adjustment has been published.

1.12.9 EasyRapport | Action link

Task #12872 | 5064.000

As it has been the case with SwissSalary Direct for some time, the 'Open SwissSalary EasyRapport' and 'About SwissSalary EasyRapport' fields are now linked to the corresponding web page in the SwissSalary EasyRapport settings. The same functions have also been built into SwissSalary Insights.

1.13 SwissSalary Direct

1.13.1 Direct synchronization | Send documents

Task #12725 | 5064.000

The Direct Sync job queue only synchronizes master data. Documents that have not yet been sent are now also sent.

1.13.2 Report card | Direct and file

Task #12919 | 5064.000

The report cards are sent to all people when SwissSalary Direct is sent, including employees who have not yet registered for SwissSalary Direct. Provided that the SwissSalary Direct settings have the Send documents to field: 'All employees'.

1.14 SwissSalary Construction

1.14.1 Reporting | Device name

Task #12699 | 5064.000

Concerns only the customers using the Construction app:
If the Reporting on devices option is activated, the 'Search term + Description' option is now available for device name.

1.14.2 Dimensions | EasyRapport

Task #12874 | 5064.000

Concerns only the customers using the Construction app:
All existing dimensions (devices, cost centers, cost units, projects) can now be transferred to EasyRapport. However, a maximum of 2 dimensions can be selected per setting.

1.14.3 ARGE report | Missing customer number

Task #12852 | 5064.000

Concerns only the customers using the Construction app:

If posting is enabled for the ARGE charging report and the customer number is missing on the consortium card, you will automatically be taken to the consortium card via notification.

1.15 Technical Information

1.15.1 Process | Pay raise

Task | 5064.000

The existing pay raise process is currently being revised and should be possible in the future to be created within SwissSalary completely with review/approval by superiors. The corresponding journals can be found via search. If the journals are created by department, the corresponding tiles appear on the home page. We are currently in a pilot phase and will provide details when the process is available.

1.15.2 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>.

1.15.3 Event | Employee Dimensions Wage accounting

Task #12740 | 5063.001

The "SwS Process Payroll" report now has a new event:

PayrollLog: The current "SwS Payroll Log"

Employee: The current "SwS Employee"

PostedEmployeeDimension: "SwS Employee Dimension posted" filtered by Employee and PayrollLog.

1.15.4 Permissions | Indirect permission for Payroll Log Overview

Task #12762 | 5063.001

Users with only the SWS-PROCESS or SWS-POSTING role could not post pay processes in SaaS. This was fixed by indirect permissions in the object.

1.15.5 REST API | Allocated Salary Line No.

Task #12832 | 5064.000

If the user sends no value for the "LineNo" field to the /allocatedsalaries endpoint in the POST request, the value for LineNo is generated by the BC.

1.15.6 REST API | Department fields missing

Task #12894 | 5064.000

The "ValidFrom" and "ValidTo" fields have been added to the /departments Rest endpoint.

1.15.7 REST AP I new field

Task #12862 | 5064.000

The "External Document No" field has been added to the /salaryjournallines endpoint.

2 Update 5064.000 | 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://swissalary.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.swissalary.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@swissalary.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.swissalary.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
<i>SWS-BUDGET-EDIT</i>	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.
<i>SWS-BUDGET-READ</i>	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.
<i>SWS-BUDGET-SETUP</i>	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.
<i>SWS-EE EDIT</i>	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.
<i>SWS-EE READ</i>	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.
<i>SWS-HR EDIT</i>	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.
<i>SWS-HR READ</i>	SWS HR READ	Read HR (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. Read-only rights.
<i>SWS-HR SETUP</i>	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.
<i>SWS-KLE EDIT</i>	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.
<i>SWS-KLE READ</i>	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.
new from 5064.000	SWS MSS	Manager Self Service	System	SwissSalary 365	This permission set contains read rights to information for department heads. Customers have different situations/requirements regarding permissions. We have applied the best practices for permission set. Permissions with additional or your own permission sets can be adjusted at any time. For more information about permission sets, see: Granulare Berechtigungen definieren - Business Central Microsoft Learn Note: We have not linked the SWS PAYRAISE PROCESS and SWS PAYRAISE READ permission sets with the SWS MSS permission set. This is because we assume that there are different situations for department heads or deputies. Department heads who do not to see

					the pay raise process at all, are only allowed to read or edit it. This means that if SWS MSS is assigned to a user, the SWS PAYRAISE PROCESS or SWS PAYRAISE READ permission set may have to be added manually.
<i>new from 5064.000</i>	SWS PAYRAISE PROCESS	Pay Raise - Edit and Process	System	SwissSalary 365	Enables pay raise process editing. Note: If a user is assigned the SWS PROCESS permission set, the SWS PAYRAISE PROCESS permission set is also assigned automatically. This is because we have linked the SWS PROCESS permission set to the SWS PAYRAISE PROCESS permission set.
<i>new from 5064.000</i>	SWS PAYRAISE READ	Read Pay Raise Data	System	SwissSalary 365	Enables pay raise process reading. Note: If a user is assigned the SWS READ permission set, the SWS PAYRAISE READ permission set is not assigned automatically. This is because we assume that not every user with SWS READ can also see the pay raise.

2.4 Role | Profiles

The profile can be adjusted to your requirements at any time. For more information about permission sets, see: [Verwalten von Benutzern und Rollen - Business Central | Microsoft Learn](#)

The profiles below are available:

SwissSalary

The SwissSalary profile is assigned to persons processing payroll.

SwissSalary Manager Self Service

In this profile, we have reduced the number of Role center and menu items on the various pages to the necessary level. Customers have different requirements regarding the Role center and the pages. We have applied the best practices for profile.