ESS version 3.2 Release Notes

The focus of this release is to deliver improvements to the Sync process which make it simpler and more efficient, especially for customers with many employees and who could experience very long Sync times.

While previous releases have included changes to aspects of the Sync process, the process has been overhauled in this version.

These changes include:

- Sync All Data and Sync Changes are replaced by a single, new option, Sync from Payroll
- The Sync process now determines whether all employees should be synced or employees changes only, based on last Sync date
- A new sync option to update leave balances for the Leave balances report has been added.
- For Sage MicrOpay customers, employee changes to be sent to ESS are now written to a new, dedicated database table.

For more information about these items along with other changes and fixes refer to What's in ESS 3.2? (see page 2)

Key	
sage MicrOpay	The item applies to customers using Sage MicrOpay payroll, only.
sage WageEasy	The item applies to customers using Sage WageEasy payroll, only.

Are you running the latest version of Sage MicrOpay and MicrOpay Client Services?

Please note that version 3.5.0.9 of MicrOpay Client Services (MCS) is available in conjunction with this ESS release and should be installed after the ESS upgrade is complete.

We recommend that ESS customers always have the most recent of Sage MicrOpay and MicrOpay Client Services (MCS) installed, to ensure consistency of data shared between payroll and ESS. When ESS is upgraded, it's also a good time to check that Sage MicrOpay and MCS are up to date.

We notify customers via email when new ESS, MCS and Sage MicrOpay versions are released. You can also check what the latest version of each is by:

- using the following link to visit the Software Updates page of our website: https://www.sage.com/en-au/support/software-updates/micropay/
- signing into Sage MicrOpay and asking Pegg a question like: *What is the latest MCS version?*

If you are a Payroll Online customer, you will always be on the latest available software versions because upgrade of Sage MicrOpay and MCS are managed as part our service to you.

What's in ESS version 3.2?

Sync and Integration

In this release, the Sync process has been overhauled. This is primarily to deliver improved performance, especially for customers syncing many employees from payroll, but also to make the process simpler to use.

This work includes changes to the Sync options that are available to you. A new option, **Sync from Payroll**, replaces the previous options of Sync All Data and Sync Changes. Additionally, syncing of leave balances for the Leave Balances report now has a dedicated sync option, **Sync balances for Leave Report**.

The main changes related to Sync include:

- **Combining Sync All Data and Sync Changes into a single, Sync from Payroll option.**

  Administrators no longer need to choose between syncing all employee data or employee changes only.

  When **Sync from Payroll** is selected, ESS checks for the last time that a sync was performed. *Last Sync* is a read-only field that displays the date/time stamp that payroll data was previously synced.

  If a date/time recorded, indicating that data has been synced previously, then **Sync from Payroll** automatically syncs employee changes made since the previous sync, only.

  A *Last Synced* value of *Not Synced* indicates that data has never been synced, e.g. following implementation for a new customer, and automatically performs an initial sync. All employees are synced to create new member profiles in ESS.

Data previously synced	Data never synced
Last Sync: Aug 3, 2021 5:14 PM	Last Sync: Not Synced

  ### What data gets synced with Sync from Payroll?

  After the initial sync that populates ESS from payroll, the following data is synced each time that *Sync from Payroll* is performed. The sync brings through changes made since the previous *Sync from Payroll* was performed.

  - New employees to create new Member profiles
  - Changes to existing employees to update Member profiles, including updates to:
    - Employee Code, other employment information such as hire date, Salary/Wage information, Tax Details, Termination Date.
    - Superannuation primary fund
    - Leave types linked to the employee

    sage MicrOpay

    - Changes to Pay Class Pay Rates

    sage WageEasy

    - Changes to Award settings, e.g. an update to Award hours or rates
  - New or updated Leave Reasons and Leave types from payroll, ie. the Leave Types and Reasons displayed in *Settings > Leave*.

  - Changes to list of values that can be selected in Member profile fields, e.g. Gender, Title, Marital Status etc.

- **A new, separate sync option to update leave balances for the Leave Balances report**

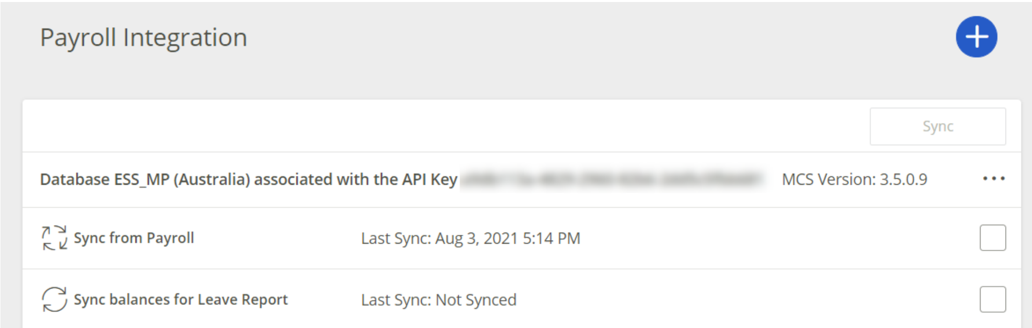
  The previous sync options, Sync All Data and Sync Changes, always included updated leave balances from payroll so that this information could be included in the Leave Balances report. Including leave balance updates each time could slow the sync process considerably so has now been removed from payroll sync and added as a new dedicated option, Sync balances for Leave Report.

  Now Adminstrators can choose to run the **Sync balances for Leave Report** only when it is required, prior to producing the Leave Balances report.

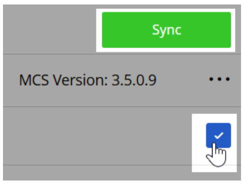
> **Please note:**
>
> **Sync balances for Leave Report** *IS NOT* required to update the leave balances displayed in Member profiles and leave applications. Member leave balances are directly updated via the Web API, each time that entitlements are updated in payroll.
>
> Running **Sync balances for Leave Report** is especially important when Members' applied leave hours are updated from *Not Yet Approved* to *Not Yet Paid*, i.e. leave hours are approved and sent to payroll but have not yet been processed in a pay. After balances are synced, these values are displayed under *Pending Hours/Pending Days* in the report. If balances are not synced first, these values are excluded from the report.

Changes to the Sync options in *Settings > General > Payroll Integration*

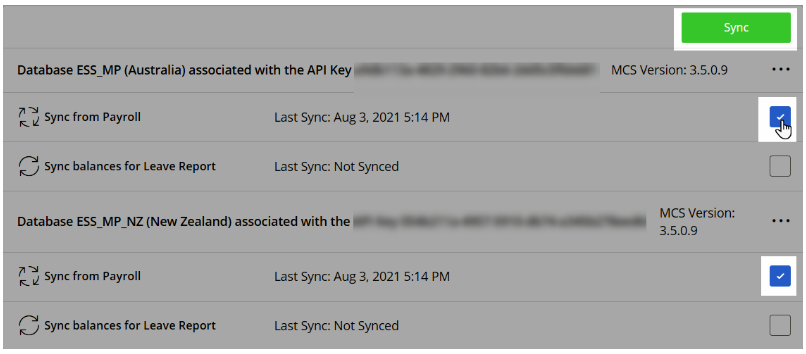
- Sync All and Sync Changes options are removed and replaced by the new option **Sync from Payroll**.
- A new option, **Sync balances for Leave** report is added



  - The **Sync** button is greyed out until at least one the Sync options must be selected. You can choose to sync both payroll and leave balances together or separately.

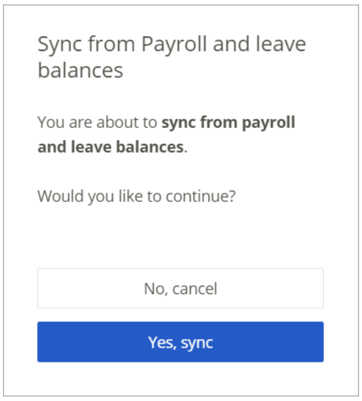


- When multiple payroll databases are listed in Payroll Integration, selecting a sync option for one database selects it for all listed databases. The sync is run for all databases, you cannot deselect individual database to exclude them.

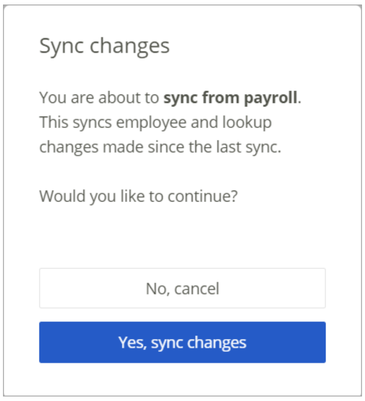


- When you select the **Sync** button, a message is displayed to confirm your choice. You are given the option to cancel the sync and change your selection, or to carry on.

Payroll and leave balances selected



Payroll only



- **New payroll database table for employee changes** sage MicrOpay

  Previously, employee changes sent to ESS came from a database table that was a 'general purpose' employee changes table, that contained records of employee changes only useful to payroll as well as those that were relevant to ESS. This could slow down the sync process, especially when many records were included in the table but only a portion of them were required to be sent to ESS.

  To address this issue, a new, dedicated database table has been added. This table, _iptblEmployeesChanged, only records employee changes applicable to ESS. This reduces the number of records required to be included in each Sync from Payroll, reducing also the time required to complete the sync.

- **Employee changes not syncing addressed** sage MicrOpay

  When the following changes were made to payroll employees, they were not picked up when ESS was synced. Both have been addressed by the new **Sync from Payroll** process:

  - New leave types added to a payroll employee.
  - Adding a new fund or editing or deleting an existing super fund.

Reports

- **Leave Balance Report**
  - **Use new Sync Balances for Leave Report option for latest leave balances**

    With the improvements and changes to the Sync process introduced in this release, the Sync option that updates leave balances for the Leave Balance Report has also changed.

    Previously, a **Sync All** had to be peformed to ensure that the latest leave balance information from payroll was available for the report. This required all employees to be synced, and synced payroll changes as well as leave balance information, which could slow the sync process considerably.

    A new sync option, **Sync balances for Leave Report**, is introduced in this release and should be selected prior to running the report, to ensure that leave balance information is up-to-date. This change gives the Administrator more control over the sync process and the data that is synced. Separating leave balance information from syncing other payroll should result in faster sync times, regardless of the sync option selected. Additionally, the code behind the process has been enhanced for more efficient handling.

    Refer to the separate Sync item (see page 2) for more information.

Please note: Sync balances for Leave Report is not required to update the leave balances displayed in Member profiles. This happens automatically when leave entitlements are updated in payroll.

  - **Reporting of pro-rata LSL balances**

    The Leave Balances Report now correctly reflects LSL balances when permissions for LSL are set to only show pro-rata balances for employees who have reached their entitlement date.

    Based on these settings, the report will only include pro-rata for employees with an existing LSL entitlement. Previously pro-rata balances were included whether the entitlement date had been reached or not.

- **Maintenance Audit Report now populated**

  An issue that caused the Maintenance Audit Report to be empty when generated is resolved in this release.

  This issue was identified following the migration of ESS to the Azure platform (ESS version 3.0, released 28 May 2021). The report contents will now populate, however data for maintenance changes made between ESS versions 3.0 and 3.2 cannot be retrieved.

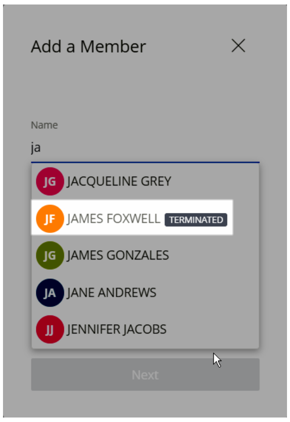
Teams

- **Loading wheel displayed while Activation page options load**

  When selecting **Activate Members** on a Team's page, a loading wheel is now displayed to indicate that Activation options are being loaded onto the page.

- **Terminated status now displayed when adding a person to a team**

  When adding a person to a team using the **Add Member** option, a *Terminated* label is now displayed for terminated employees included in the list of **Name** results.

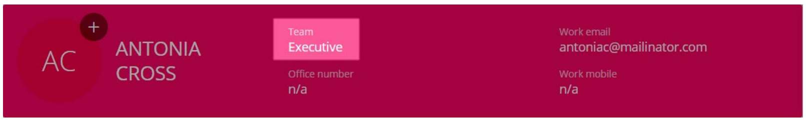


Similar changes apply to selecting Workflow Approvers (see page 6) and New Starter Reporting Managers (see page 7).

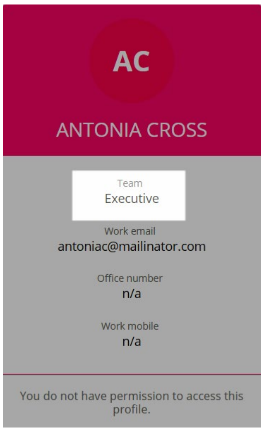
Profiles

- **Default approval team displayed in banner and business contact infomation**

  The Member profile banner now displays the person's default team for approvals. Previously, the banner displayed the first team that was assigned to the person.



The person's default approval team is also displayed when their business contact information is viewed in the Directory.



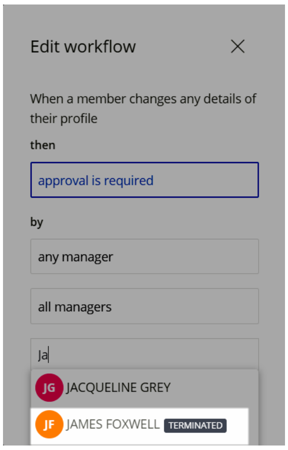
Workflow

- **More efficient loading process for Leave Workflow page**

  We've made changes to improve the time taken to load the Leave Workflow page and prevent the page from timing out. Timeouts were experienced by a small number of customers with many, i.e. thousands, of leave applications submitted through ESS.

- **Terminated status now displayed when selecting a Workflow Approver**

  When selecting an Approver, a *Terminated* label is now displayed against terminated employees included in the list of **Name** results.



Similar changes apply when adding members to a team (see page 5) and selecting New Starter Reporting Managers (see page 7).

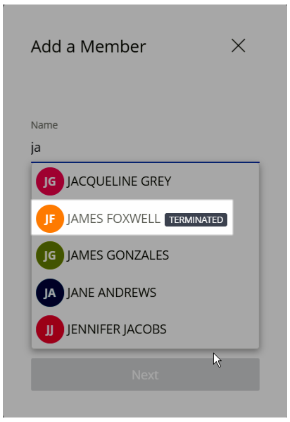
New Starters

- **Improved validation of New Starters usernames**

  Validation of the temporary usernames assigned to New Starters, to ensure that a previous username is not reused, is improved in this release.

- **Terminated status now displayed when assigning a Reporting Manager**

  When assigning a Reporting Manager in the Add New Starter forms, a *Terminated* label is now displayed for terminated employees included in the list of **Name** results.



Similar changes apply when adding members to a team (see page 5) and selecting Workflow Approvers (see page 6).

Accounts and Activation

- **Activation status updated when second activation link sent**

  When a second or subsequent activation link is sent for a non-activated Member, including New Starter, the status of the previous activation link stored in the database is now updated to expired. This corrects an issue where the second/subsequent link did not work because the previous link still appeared to be active.