Sage Self Service

What's New
May 2024

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1.0 What are the changes in v1.22 *(Released 07/05/2024)*

1.1 Server Maintenance

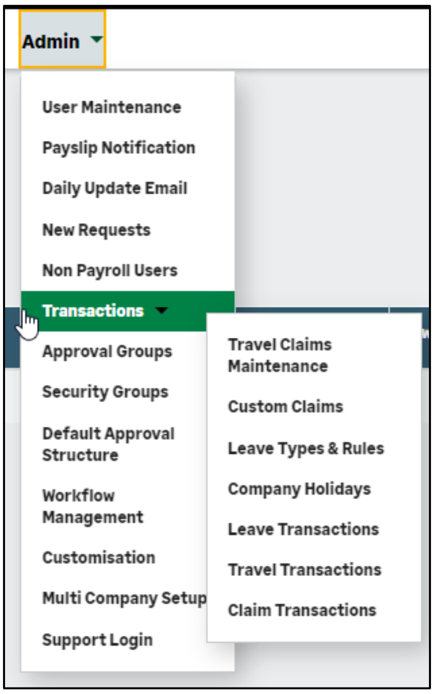
With this release the .Net Core version on the servers will be updated, allowing for improved performance and resource utilisation.

2.0 What are the changes in v1.20 *(Released 04/05/2023)*

2.1 Transactions Menu Item Under Admin

All menu items relating to transactions are now under Admin > Transactions. This means that the following items will also be available under Transactions, and not directly under Admin anymore:

- Travel Claims Mainenance
- Custom Claims
- Leave Types & Rules



The following enhancements were added under the Transactions Menu Item:

2.1.1 Company Holidays

A new function to delete Company Holidays is available under Admin > Transactions > Company Holidays.

The delete function will only be visible, if public holidays are uploaded from payroll. If no public holidays are uploaded from payroll, the Sage Self Service public holiday template dates will apply and these dates cannot be deleted.

To delete Company Holidays:

- Go to Admin > Transactions > Company Holidays
- Click on the Delete button next to the Company Holiday that must be deleted.
- Select <Yes> to delete or select <No> to cancel the action

Tip: Ensure that the Company Holiday is also deleted in your payroll system. Else, when you sync the company holidays from payroll to Sage Self Service, the date will sync as a Company Holiday again.

2.1.2 Leave Transactions / Travel Transactions / Claim Transactions

This option allows the Admin User to see all the transactions that have been approved for the last three months and gives the Admin User the ability to resync or stop a leave transaction from syncing to payroll.

The Status column will indicate what the current status of a transaction is:

- New Entry = transaction still needs to sync to payroll
- Done = transaction is already synced to payroll

To change the sync status:

- Click on the <Set Synced> button to change the transaction’s status to a “Done” status, ie. already synced.
- Click on the <Set Pending> button to change the transaction’s status to a “New Entry” status, i.e. to be able to sync the transaction to payroll again.

For Leave Transactions, please take note:

The last three months refers the last three month’s “From Date” of the transaction. Future transactions will also display.

Bear in mind that leave balances are synced to Sage Self Service with roll-over in payroll.

For Partner clients, please take note:

If the transaction has already been applied to the payslip in payroll, then you will have to manually remove the transaction from the payslip, if it should no longer be processed.

2.2 Items Resolved

The following items have been resolved in this release:

Area	Details
Leave Schedule : Legend does not show properly if there are a lot of leave types	Colours increased to 30 different colours. If there are more than 30 leave types, the remainder will display as dark grey.
Sage Self Service App	We are aware of the following message that some Android users get when trying to install the app: ”This app isn’t available for your device because it was made for an older version of Android”. A new version will soon be available in the App Store to resolve the problem.

Privacy Policy and Terms and Conditions	Updated to refer to links: https://www.sage.com/en-za/legal/privacy-and-cookies/ and https://www.sage.com/en-za/legal/terms-and-conditions/product-and-service-terms-and-conditions/

3.0 What are the changes in v1.19 *(Released 24/10/2022)*

3.1 Items Resolved

The following items have been resolved in this release:

Area	Details
Payslips do not want to download	When an employee has been deleted and the same Employee GUID is used for the second employee record (same), then the payslip did not want to download. The download will now exclude any GDPR deleted employee records.
Travel Report does not return any records	In some instances, the Travel Report did not want to load.
Counter shows on Inbox, but there are no records when Inbox is opened	Declined transactions showed a counter on the Inbox. However, declined transcactions are not reflected in the Inbox. The counter will no longer show declined transactions.
No employees display when creating a security group	The sceen did not refresh, so the employee list did not display.

4.0 What are the changes in v1.18 *(Released 10/08/2022)*

4.1 Branding

As part of our rebranding, we have introduced a new logo. Our colour scheme has also changed and is incorporated on our Main Menu and buttons.

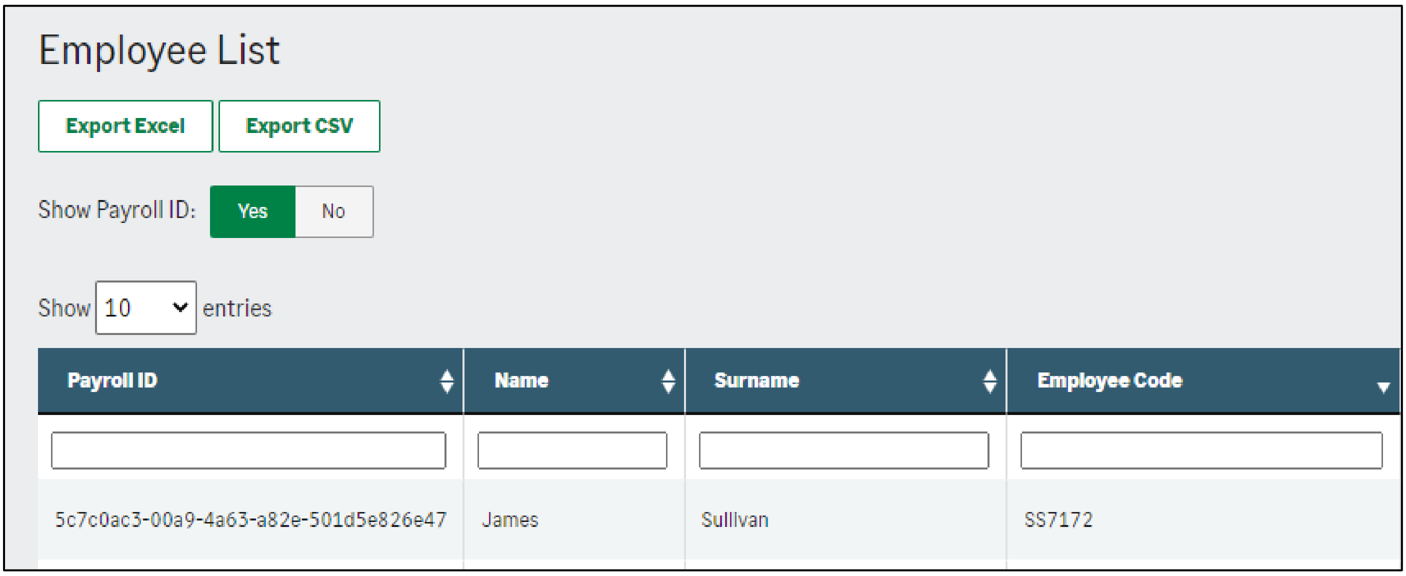
4.2 Employee GUID (Enhancement)

The Employee GUID number, as stored on the Sage Self Service Database, can now be displayed on the following screens:

- Manager > Employee List
- Admin > User Maintenance

The view Employee GUID option is visible when logged in as an Admin User.

To view the Employee GUID, the user has to select “Yes” next to “Show Payroll ID”. The Employee GUID will display in the first column in the grid.



Tips:

Comparing Employee GUIDs in payroll vs Sage Self Service: Manager > Employee List, the Employee GUID can be exported to excel.

Deleting of Employees (mostly used for duplicate records): Admin > User Maintenance, the Employee GUID can be checked against the Employee GUID in payroll, ensuring that the Admin User delete the correct record.

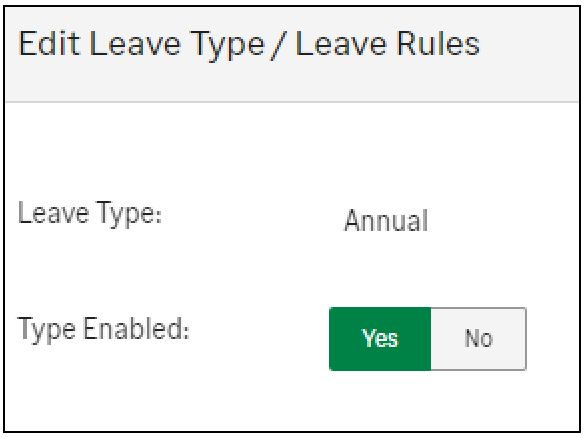
4.3 Leave Types Enable/Disable Function (Enhancement)

A new function to enable or disable leave types is available under Admin > Transactions > Leave Types & Rules.

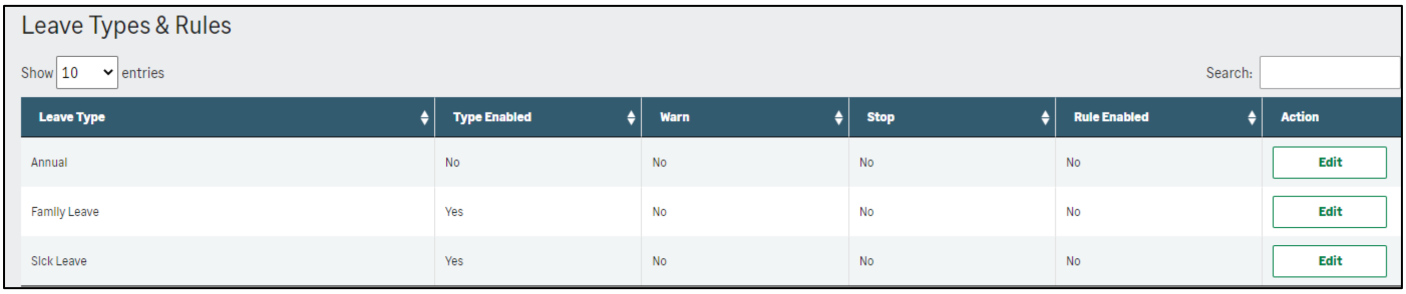
- Enabled leave types will display for users when applying for leave.
- Disabled leave types will not display for users when applying for leave.

To disable/enable a leave type:

- Go to Admin > Leave Types & Rules
- Click on the Edit button next to the leave type that needs to be altered
- Select Yes to enable or select No to disable
- Save



An extra column, called “Type Enabled”, was added to the grid that will indicate if a leave type is enabled or disabled.


Leave Types & Rules

Show 10 entries   Search:

Leave Type	Type Enabled	Warn	Stop	Rule Enabled	Action
Annual	No	No	No	No	Edit
Family Leave	Yes	No	No	No	Edit
Sick Leave	Yes	No	No	No	Edit

4.4 Custom Claim Transaction Code List (Enhancement)

Admin > Custom Claims

When adding a new Custom Claim, the transaction code list is now sorted in alphabetical order.

4.5 Items Resolved

The following items have been resolved in this release:

Area	Details
Custom Claim: There was a problem fetching details for this transaction error	The following Error message displayed when a user wanted to view the custom claim under Reports > Custom Claim. This happened for claims with a zero value under the Amount column.

Firefox Browser	When working on Firefox, the Default Approval Structure and Workflow Management Structure did not load.
Partner Clients: Reset Password	When the e-mail address was not populated in Sage Self Service, there was an error when users tried to reset their password.
Customisation	Uploaded image and background colour now saves.

5.0 What are the changes in v1.17 *(Released 12/05/2022)*

5.1 Declined transaction does not show in the users' inbox

In some instances, users could see the counter on "My Inbox", but when opening the Inbox, no transaction displayed. The counter indicated a declined transaction. The declined transaction will now display in the users' inbox.

6.0 What are the changes in v1.15 *(Released 18/10/2021)*

6.1 Leave application and System not responding

When the employee applies for leave via Sage Self Service site, the browser "hangs" and does not respond, when selecting the leave dates on the calendar. The transaction cannot be submitted.

The problem occurred when the Working Days have not been defined per employee, which is required for the leave Calendar to calculate days. The problem has now been resolved.

6.2 Leave Rule validation

The leave rule states that your leave balance is not allowed to go below the total days as on the setup. When entering leave days, the test did not perform correct and gave a warning message that the employee is not allowed to to leave, whet in fact he could take the leave. Amendments were made to avoid incorrect calculation of allowable leave days.

6.3 Username containing spaces

In certain scenarios the system created User Names that contained spaces. This resulted in problems as the users cannot log in with these user names. System changes has been implemented to prevent this from occurring in future.

7.0 What are the changes in v1.14 *(Released 08/12/2020)*

7.1 Close Leave Transactions

Ability to close the leave transactions which are in an "Approved and Closed by Admin" status have been added.

The Close Transaction button is under Reports > Leave Reports > View detail pop-up window.

Take note that when a transaction has been closed, the process cannot be reversed. If the transaction has already been synced to payroll, the transaction will need to delete it in payroll too.

7.2 Delete Employee Record

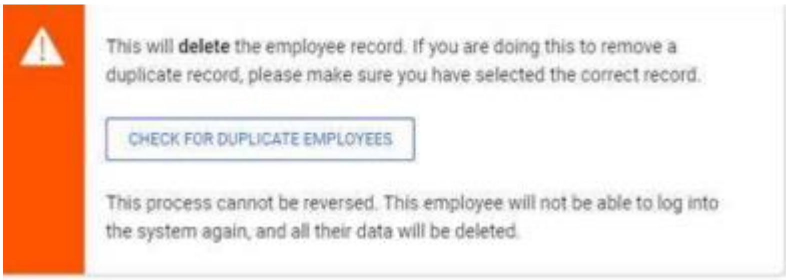
The delete employee record functionality is now available for the Admin user (previously only visible to a Support User). Take note that the process can not be reversed. The deleted user will not be able to log into the system again, and all their data will be deleted.

Before deleting an employee record, make sure of the following:

- The employee is unlinked from the Default Approval Structure (if applicable).
- The employee is unlinked from the Workflow Management (if applicable).
- All transactions have been actioned (ie. no transactions are in the workflow).

The Delete button is under Admin > User Admin, next to the Reset Password button.

- There is also an option to Check for Duplicate Employees. If a duplicate record is going to be removed, please make sure that the correct record is selected.
- This option will be displayed after selecting the Delete button.



7.3 Items Resolved

The following items have been resolved in this release:

Area	Details
South Africa/Public holidays (2021)	The South African Public Holidays for 2021 has been updated.

8.0 What are the changes in v1.13 *(Released 14/08/2020)*

8.1 Items Resolved

The following items have been resolved in this release:

Area	Details
Custom Claim	Characters on a Custom Claim increased from 50 to 250.
Leave Report	Received an error message “Something went wrong . . .” when

	leave records uploaded without a valid employee ID.
Duplicate Leave Lines	Leave Type will not show in Sage Self Service after it has been removed from Payroll.

9.0 What are the changes in v1.12 *(Released 16/10/2019)*

9.1 Enhancement of Leave Report

Additional features have been added to the Leave Report:

- The employee name and surname is now split into two columns.
- A date picker is available for the following columns: Date From, Date To and Date Submitted. The date picker allows you to select a date range for each of these columns. Please Note: When you click in the relevant column, two calendars will display, allowing you to select a range for that specific column. Example: I want to see all leave transaction where the end date of the transaction was between 15 September and 5 October. Use the Date To date picker to select the range – 15/09/2019 to 05/10/2019.
- Arrows added to direct the user to the first or last page of the leave records.
- The background call of the leave transactions has been amended to solve the time-out issues.

9.2 Items Resolved

The following items have been resolved in this release:

Area	**Details**
Bulk Payslip Notifications	Not all payslip notification e-mails were delivered to employees.
Comment on New Requests when approving or declining a change	If the Admin User approves the change, comment field will no longer be visible. If the Admin User declines the change, the comment field will be visible. If a comment is captured for a declined transaction, the comment will populate in the Audit Trail : Manager > Audit Trail > View Employees > View Audit Transaction Details
Approval Groups	Tests has been added to ensure that an Approval Group cannot be de-activated if it is still linked to a workflow, as it will result in transactions not being finalised (approved or declined).
Audit Trail – Bank Change	Only the branch number displayed on the Audit Trail when an employee changed their banking details. It will now reflect the bank name and the branch name in brackets. Note: If bank name and branch is not defined under the system description codes in payroll, then bank codes will display as “No data to display” in Sage Self Service under the employee’s Personal

	Details.
Workflow Management – Document Type Column	When a lot of document types were linked to a Workflow Management group, the grid was stretched. The grid no longer stretches and will display dots. When you hover over the document types, it will show a list of all the items linked.
Security Groups – Physical Address did not save	Physical Address did not save in the scenario below: Access > Postal Address section visible is No Access > Physical Address section visible is Yes and Yes to amend Physcial Address Manager logs in to make change on Physical Address, but changes did not save. Physical address will now save in above scenario.
Security Groups – error when Contact Details access is No	An error message, “There was a problem fetching data from this employee”, appeared when the access to Contact Details was set to “No”.
Default Approval Structure	Only applicable to SBCPP clients. Issue is resolved where the Default Approval Structure hangs or moved employees to the Unassigned column.

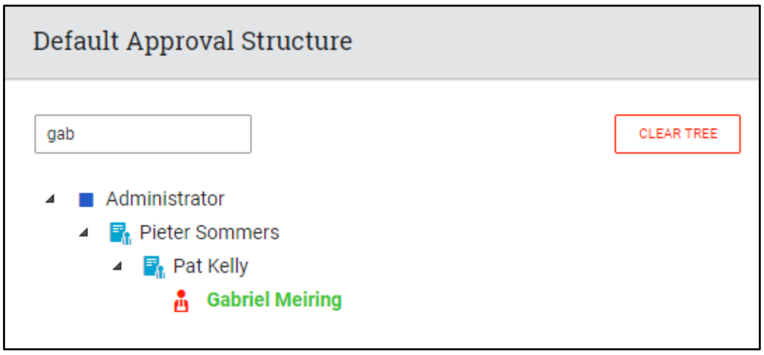
10.0 What are the changes in v1.11 *(Released 19/06/2019)*

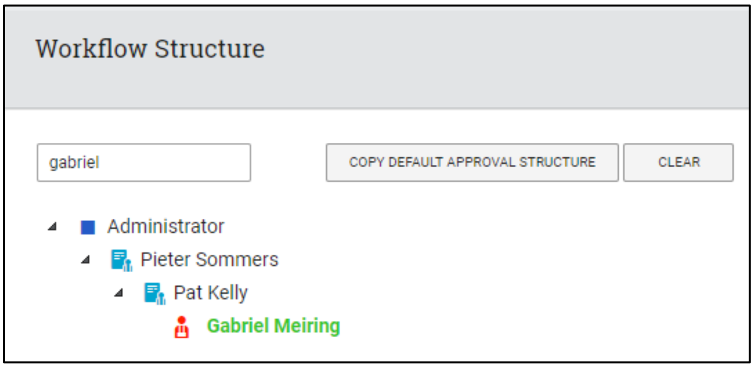
10.1 Improve Usability on Default Approval Structure and Workflow Management Enhancement

This release mainly focused on enhancing the setting up and maintenance of the Default Approval Structure and Workflow Management of Sage Self Service.

Please Note: When you access the Default Approval Structure or Workflow Management for the first time after the release, the structure will be minimized. Also note if you access any of the mentioned structures in a new browser for the first time, it will also be minimized.

Search functionality is now available for the Default Approval Stucture and Workflow Management. The search functionality allows the user to search on the name, surname or name and surname of an employee. All employees in the related search will be marked in green. The tree will display the employee, as well as the manager/approver that the employee reports to. The drag and drop will still work on the filtered tree structure.





The state of the tree will now be saved eg. the user opens up either the Default Approval Structure or a Workflow Management tree and expands certain nodes. These open nodes will be saved, even if the user logs out and back in again. Take note of the logic for saving the states:

- Firstly, it is browser based – each browser will save the state used for an employee. Changes in one browser will not affect the other browser's state.
- Secondly, it is user based – within each browser usage, each Admin will have their own state saved (multiple companies).

10.2 Payslips

- Partner Clients: payslips will now upload separately into the DB and no longer as a zip.
- All Clients: Payslips will delete from the DB once it uploaded successfully to Sage Self Service.

10.3 Administrator: Password Change

The Admin user will no longer have the option to change their password in Sage Self Service. The Admin user will only be able to change their password from within the payroll system.

10.4 Items Resolved

The following items have been resolved in this release:

Area	Details
Saving of Default	There was an issue where the Default Approval Structure did not want to

Approval Structure	save when the expanded tree was long.
Claims Mail	Now updated to refer to the mobile app from the Google Play or Apple App stores. Previously only referred to the Google Play Store.
Recalled Transactions in Approval Groups	Recalling a transaction when it is currently assigned to an Approval Group incorrectly remained in the inbox.

11.0 What are the changes in v1.10 *(Released 27/03/2019)*

11.1 Items Resolved

The following item has been resolved in this release:

Area	Details
Multi Company linking	The following Error message displayed when trying to link companies on Sage Self Service: "Failed to link company. Please contact the support desk".

12.0 What are the changes in v1.9 *(Released 06/03/2019)*

12.1 Security Enhancement

This release mainly focused on security enhancements of Sage Self Service. Process changes have been applied to enhance security on the site.

12.2 reCAPTCHA with log-in

Previously, the reCAPTCHA only appeared after three unsuccessful login attempts.

Currently the reCAPTCHA will be used and validated on every login attempt. If a user fails to authenticate on three occasions, the user will be locked out for 15 minutes. For every failed authentication attempt thereafter, a five minutes delay will be added.

12.3 API

There is an API that enables integration between Sage Self Service and Cloud Business Payroll Professional.

13.0 What are the changes in v1.8 *(Released 05/10/2018)*

13.1 Items Resolved

The following items have been resolved in this release:

Area	Details
Payslip downloads	Payslips did not download when a special character was part of the employee's name or surname.
Attachment downloads	Error retrieving document on certain attachments.
Leave transaction days = 0	Where the preceding leave transaction was 1 day and the current transcation was also 1 day, the amount of days showed as 0 in the inbox of the approver.

14.0 What are the changes in v1.7 *(Released 17/08/2018)*

14.1 Multiple Companies

This release focused mainly on the functionality of multiple companies.

The set-up has been changed so that a main company is no longer needed. Companies can now be linked at random.

The following items have been changed and/or resolved:

14.1.1 Admin User

All Admin Users in linked companies will be able to see the following:

- Employees in all linked companies under Admin>User Maintenance and Manager>Employee List.
- All workflows set-up in the different companies.
- Transaction and New Requests from employees in all linked companies.

14.1.2 Manager User

All Manager Users will be able to see all the employees that report to them across the linked companies.

14.1.3 Approving Transactions

Approvers in linked companies are now able to approve transactions across linked companies and will no longer get an error.

14.1.4 Known Issues (not resolved yet)

- Custom Claim Reports do not display.
- Manager Reports do not display.

14.2 Items Resolved

The following items have been resolved in this release:

Area	Details
Leave Rules with blank value	The following Error message displayed when applying for leave on a leave rule that is set-up with a blank value: “Nullable object must have a value”. From v1.7 if a blank value is saved on a leave rule, the system will see the blank value as a zero and will not allow leave transactions exceeding available leave days.
Comment does not save when submitting custom claims	When an employee loaded a custom claim transaction with a comment, the comment did not show when viewing for approval or on the Custom Claim Report.
Custom partial days on leave transactions	Leave transactions with custom partial days (up to 3 decimal places) rounded in payroll and the three decimal places did not show as expected.

14.3 Useful Information

14.3.1 Delete of Employees

Refer to release v1.4 – delete of employees. We would like to bring the following item omitted on the release notes under your attention.

Example: If you have a workflow structure with multiple approvers, for example: Employee>Approver 1>Approver 2>Approver 3>Admin, and you delete Approver 3 without changing the workflow approval structure, the following will happen:

- Approver 3’s children will go directly to Admin.
- Approver 1 and Approver 1’s children will go directly to Admin.
- Approver 2 and Approver 2’s children will go directly to Admin.

14.3.2 CSV Export for Travel and Custom Claim Reports

The CSV export displayed any amount exceeding R1,000.00 incorrectly. This has been amended. If you export your CSV Report and the display of the amount is still incorrect, whilst standing on the report screen, press Control F5. When you export the CSV again, the amounts will now display correctly.

15.0 What are the changes in v1.6 *(Released 06/07/2018)*

15.1 Items Resolved

The following items have been resolved in this release:

Area	Details
What's on Today – Leave Transactions	"No employees are currently on leave today" reflected under "What's on Today", regardless of whether employees were on leave that day or not. This has been rectified to only display employees on leave now under "What's on Today".
Leave Report – $\frac{1}{2}$ Day	The number of days reflected as 0.000 instead of 0.500 under Leave Reports.
Mobile App – Message when signing out	When signing out of the mobile app an incorrect message, asking the user to download the app, displayed.

15.2 Useful information

15.2.1 My Inbox

We have reintroduced the 'Employee Code' column with sorting under My Inbox.

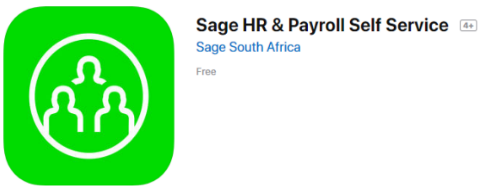
15.2.2 Public Holidays

If public holidays are defined in your payroll company, the days defined in payroll will be used in Sage Self Service.

If no public holidays are defined in your payroll company, the public holidays in Sage Self Service will default to the RSA public holidays.

16.0 What are the changes in v1.5 *(Released 15/06/2018)*

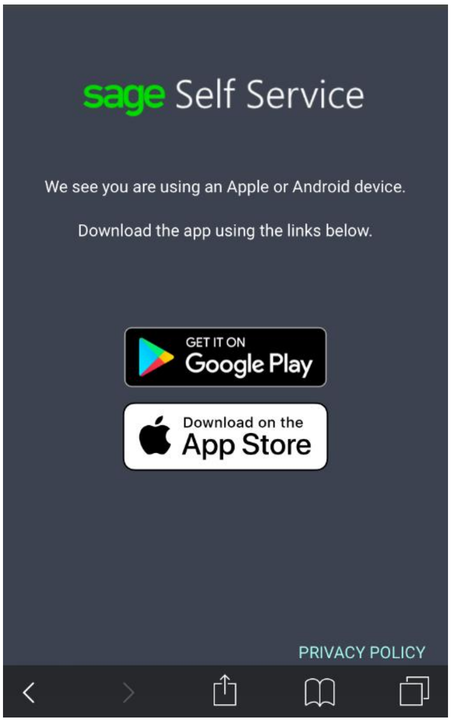
We are pleased to announce the launch of our mobile phone app, "Sage HR and Payroll Self Service", for both iOS and Android operating systems.



The Android product has been updated and the iOS version is brand new to the market.

By using the Apps, you will have a better experience of the Sage Self-service application.

From version 1.5 onwards, all mobile users will be required to download the mobile apps.



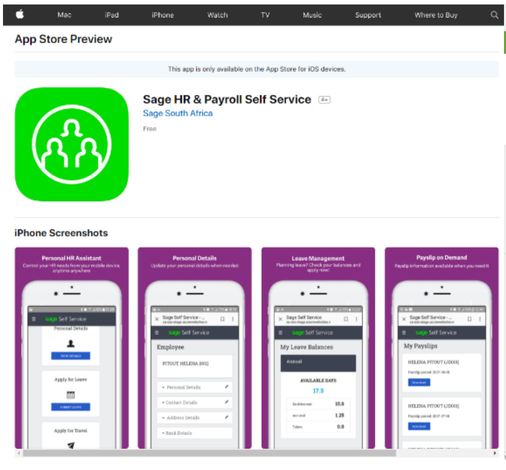
When you access the Sage Self Service website from any mobile device the screen as displayed on the left will display.

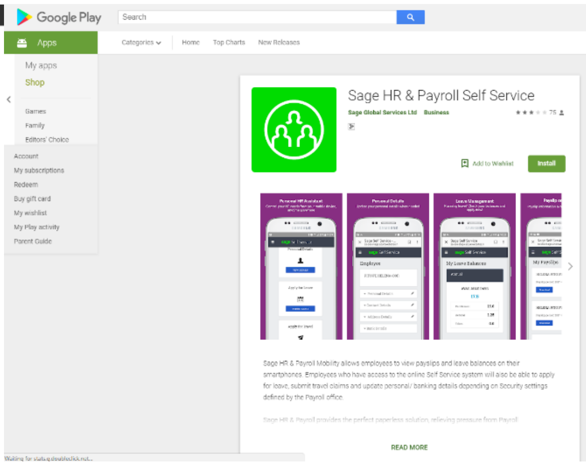
Click on the applicable link to download and install the applicable app.

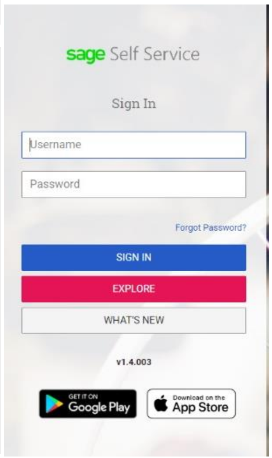
Links are also available on the normal Sage Self-service web page.

iOS store for Apple devices

Google Play store for Android devices







17.0 What are the changes in v1.4 (Released 31/05/2018)

17.1 Delete Employees

Our support desk receives requests from time to time to remove employees from the Sage Self Service portal.

To improve on our service delivery in this regard, the process has been made easier and the support desk will in future be able to assist without having to refer to the development team.

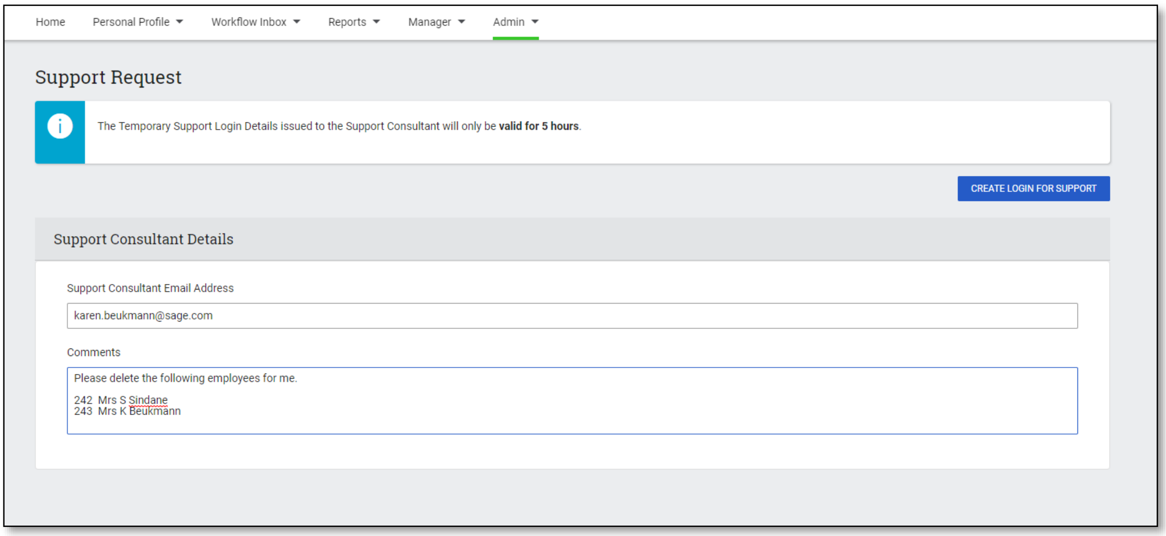
What will the process entail?

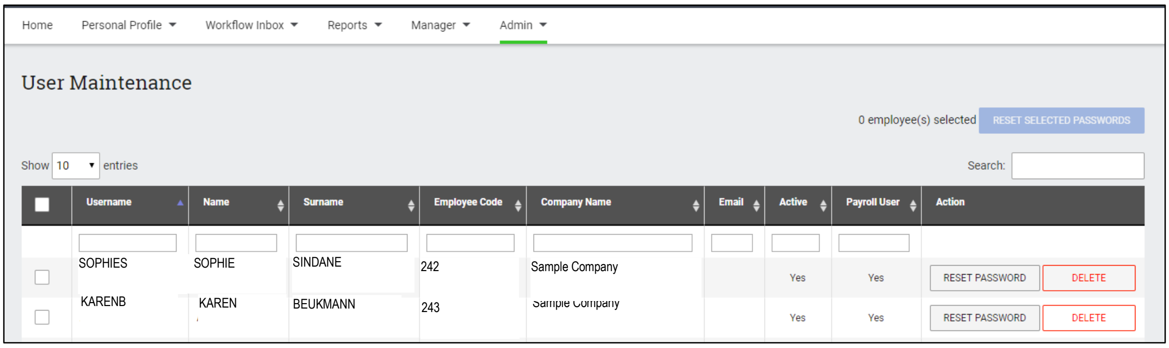
- On the Admin menu, select the Support Login option.
- Enter the contact information of the support consultant that you have been speaking to. In the Comments field, enter the detail of the employees to be deleted, including username, employee number, name and surname.
- The consultant will receive an email that will allow him/her to log in for a period of 5 hours.
- Once the consultant has logged in, on the Admin, User Maintenance option, there will be an option for the consultant to delete the applicable employees next to each employee.
- This will delete the employee and all associated transactions.

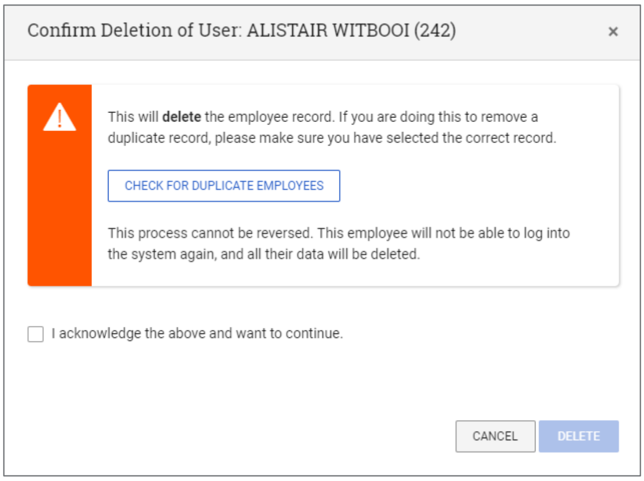
Important points to consider before deleting employees:

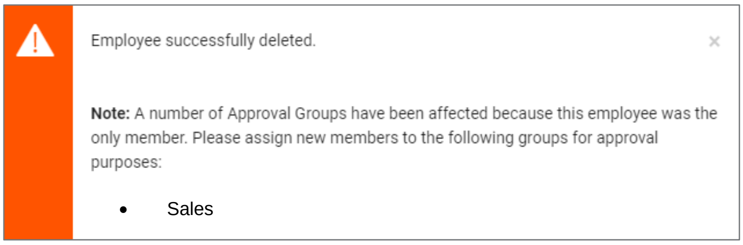
- It is advisable to approve any pending transactions and review the approvers in a workflow or approval group, before a request is sent to the support desk to assist with deleting employees.
- If there is only one approver in a workflow or default approval structure and this approver is deleted, pending and future transactions will go to the admin user. A new approver needs to be assigned in the group for future transactions
- If there is only one approver in the approval group and this approver is deleted, a new approver needs to be assigned in the group for pending and future transactions. Any transactions in the approval group will not be visible until an approver is assigned.
- The consultant will be able to view duplicate employees on the delete function, based on employees with the same employee number, name and surname.

Employee delete process example









17.2 Pay Frequency on Custom Claim Transactions

A new field for selecting pay frequency has been added to custom claim transactions with amounts integrating to payroll. The user can select from a list of pay frequencies for monthly, weekly or fortnightly.

17.3 Items Resolved

The following items have been resolved in this release:

Area	Details
Forgot Password	Any attempt to login after 3 failed login attempts will require a re-captcha validation - even if attempting to log in via a different browser.
Leave Approval – Partial Days	The number of days taken when approving a partial day custom item reflects as: e.g. 0.33000000000011 instead of 0.330
Leave Approval – Remain in Inbox	The administrator approved a leave request. The approved transaction did not clear and the same transaction could be approved several times. The staff member received 3 email notifications in a row. Each email incorrectly reflected the leave as deducted again. Please note, the days were only deducted once even though it displayed as if deducted multiple times.
Declined Leave Remain in Inbox	Declined leave remained in the user's inbox. The list of items should refresh and the reference(s) that were actioned should no longer display.
Admin user to see Payslips	When an Admin user attempts to view an employee's payslip via Manager | Employee List | View Payslip, no payslips display. The admin user will now be able to view the same payslips viewed by the employees. This makes it easy for the admin user to know when the payslips are uploaded.
Claims Report	Amount Column added to Claims Report.
Leave Report	Days taken column added to Leave Report.

17.4 Useful information

17.4.1 Transaction Codes

The transaction count indicator has been reintroduced. This count is not a real-time count and refreshes on login and every 2 minutes thereafter.

17.4.2 Adding multiple attachments on transactions

Multiple attachments can be uploaded when submitting a new transaction by selecting all the relevant documents when browsing for attachments. If an attachment is already uploaded, browsing for another document will replace the existing attachments already uploaded.

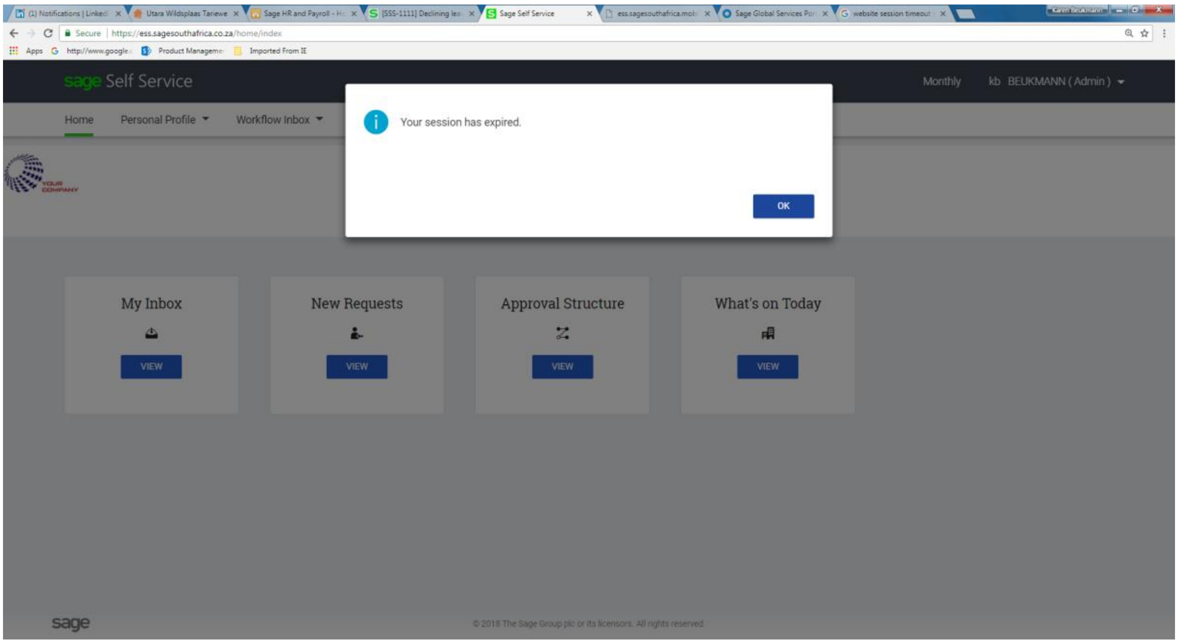
17.4.3 Synchronization intervals

Syncing will take place every hour.

17.4.4 Website time-out

A session timeout is an important security control for any application. It specifies the length of time that an application will allow a user to remain logged in before forcing the user to re-authenticate

The Sage Self Service system will allow 30 minutes of inactivity before automatically logging off the user.



18.0 What are the changes in V1.3 *(Released 16/03/2018)*

Items included in this release are:

- Leave
    - The Recall Leave Transaction option has been brought back.
    - Allow for Leave transactions that are only for a partial day (other than $\frac{1}{2}$, $\frac{1}{4}$, $\frac{3}{4}$) Tick the Partial Days option and select Custom to input the required fraction.
    - Displaying the Approver to indicate of who will receive your leave application.
- Workflow Inbox
    - Display the number of items in My Inbox *(This item was recalled on the 20th of March due to speed implications)*
- General Items
    - Month and Year selectors are added to the Date Picker
    - When adding an Approval Group for the first time, the group is now saved.
    - Sending of sms's when the Admin user resets a password
- Error Messages Resolved
    - Object Reference Error when copying Default Approval Structure.
    - Payslip Notification Error when an employee has an email address but no cell
    - phone number.
    - When viewing the Audit Transaction List for certain employees, it resulted in an error message

19.0 What are the changes in V1.2 *(Released 23/02/2018)*

V1.0 resulted in frustration with some of our first Sage Self Service users. We would like to apologise and we truly hope most of the major frustrations have been resolved.

We also received numerous requests and suggestions on the new site and we would like to acknowledge them and promise that they will be prioritised and get our attention.

The items included in this release are:

- Reports:
    - Split Employee column reflecting the Employee code in brackets into 2 separate columns containing Employee Name and Surname and Employee Code
    - Add more paging options on grids to enable larger grid exports (250, 500 and 1000)
- Leave
    - Leave Balance will now display on Leave Inbox items
    - Leave Status wording changed from "Approve and Closed by admin" to "Approved and Closed by admin"
    - Leave Notification emails will now display:
- Correct Leave Types.
    - The next person/group's name in the workflow process, that will receive the application.
    - Leave Schedule will now reflect employee Surname and First name
- Workflow View
    - Under the Admin Menu, Workflow Management, selecting to view a Workflow Group, the user will no longer be able to move the employees on the workflow structure. It will only be possible to move employees once you are change in mode.
- Payslips
    - Managers or Security group members are no longer allowed to view payslips of employees that report to them or that they have access to under security groups.
- Daily Update emails
    - Daily update will no longer be received in duplicate.
- Error Messages:
    - No more error messages when approving leave or claims
    - No more error messages when saving workflow structures

20.0 What are the Changes in V1.0 *(Released 15/02/2018)*

The items listed below are the principal areas of change on the new Sage Self Service update.

- User Interface
  - The names of some menu options were changed
  - Example: Org Chart is now called Default Approval Structure
- Administrators can no longer see:
  - Personal Details and Payslips on the administrator login
  - Cannot process any transactions for the administrator profile, only for other employees

21.0 Closure

Available functionality will depend on the login type used.

Admin users will be restricted to Admin related functions.

User login will allow changes to Personal Details and applying for various Leave Transactions and submitting Travel Claims.

Further functionality and improvements will be added to the new site, be on the lookout for update notices!

For any suggestions please email user.feedback@sage.com

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