

Sage X3 HR and Payroll V12

Other Entries

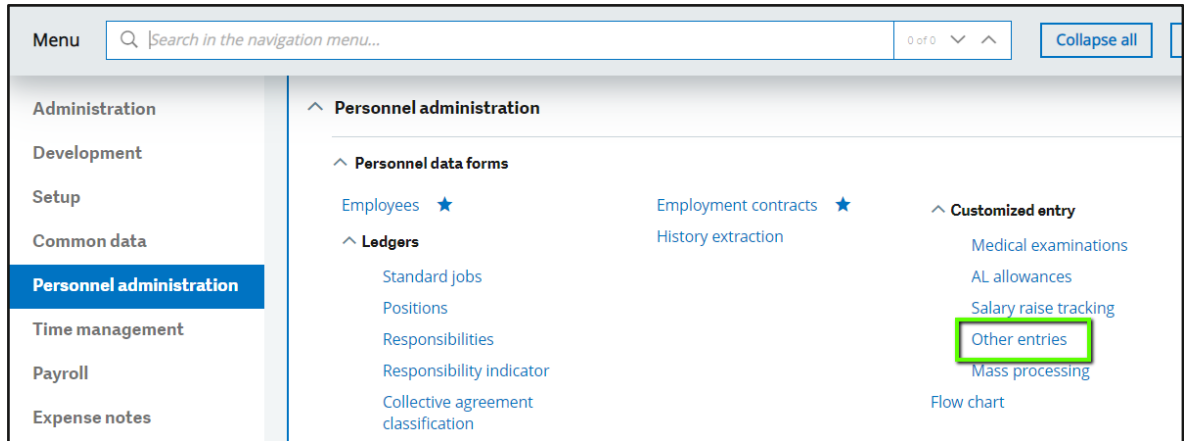
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1.0 Other Entry Reports

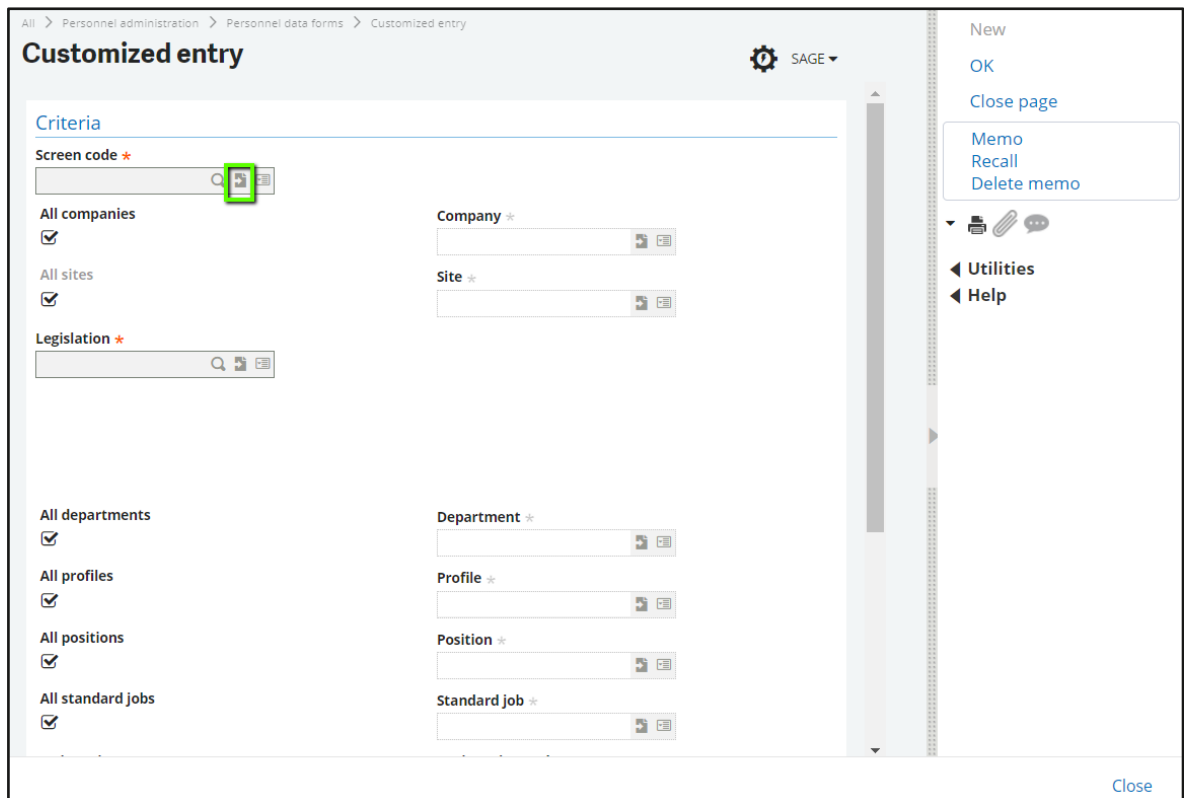
1.1 Writing a report

Access: Personnel administration > Personnel data forms > Other entries

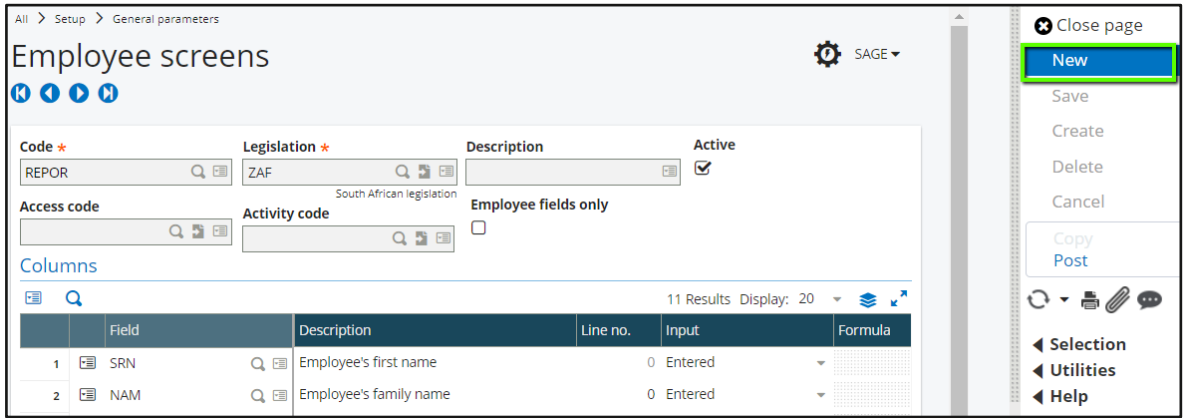


The Customized entry screen will be displayed.

Click on the 'Jump to' button:

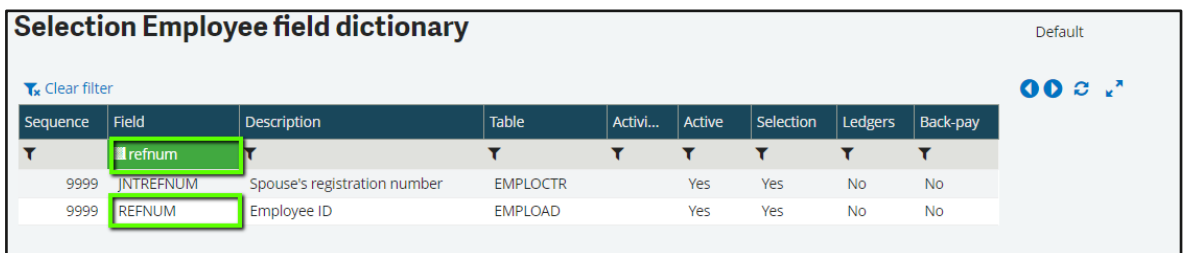
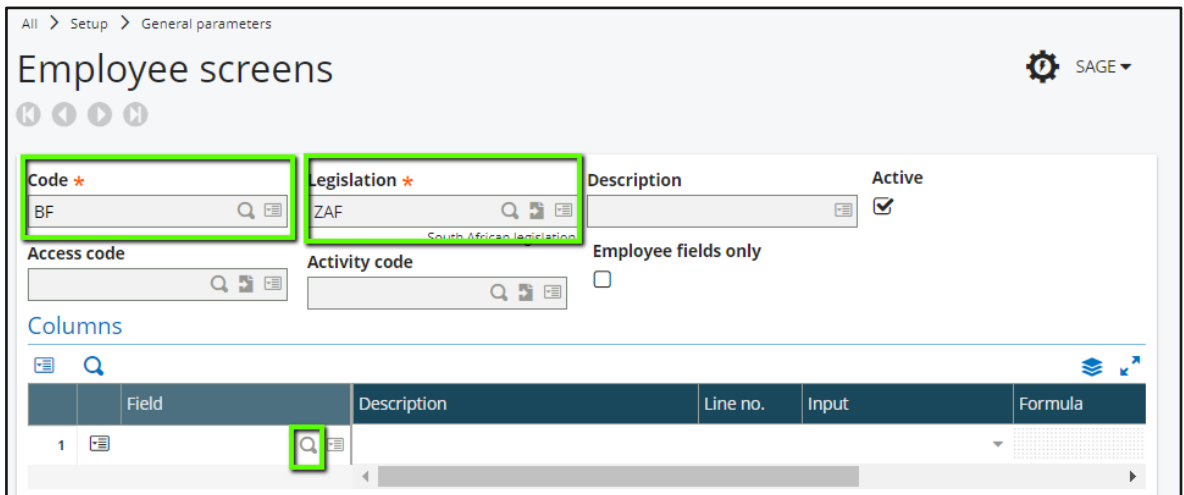


The following Screen will be displayed:



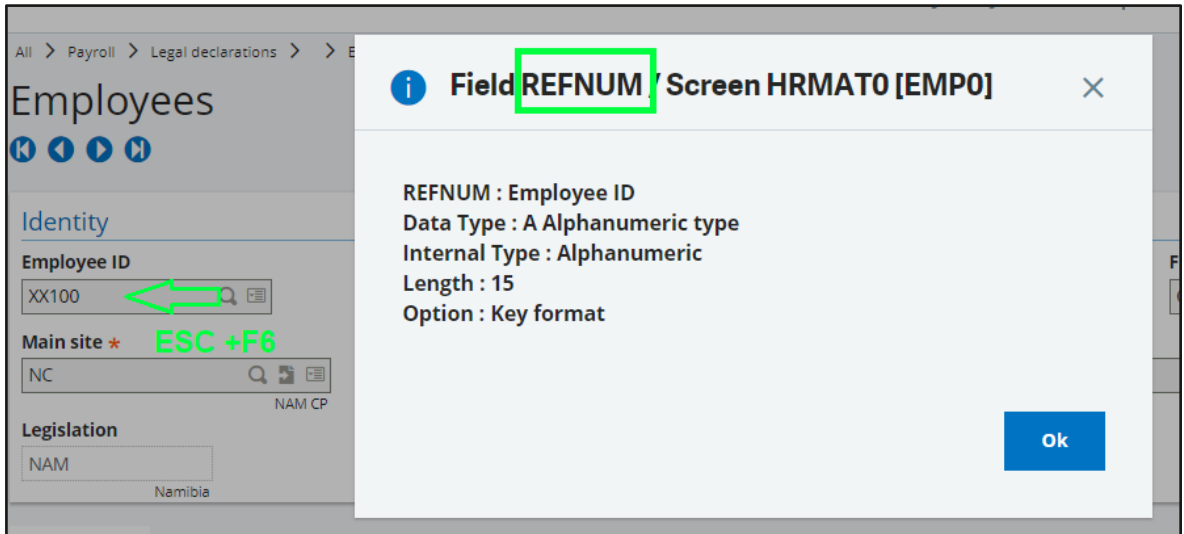
- Click [NEW]
- Type in the Code and Title
- Ensure the Active Box is ticked
- Add the fields

By clicking on the hourglass, you can select common fields e.g. Employee ID, Name, Surname, Birth date, Region etc, all the fields on the Employee record and Employment contract.

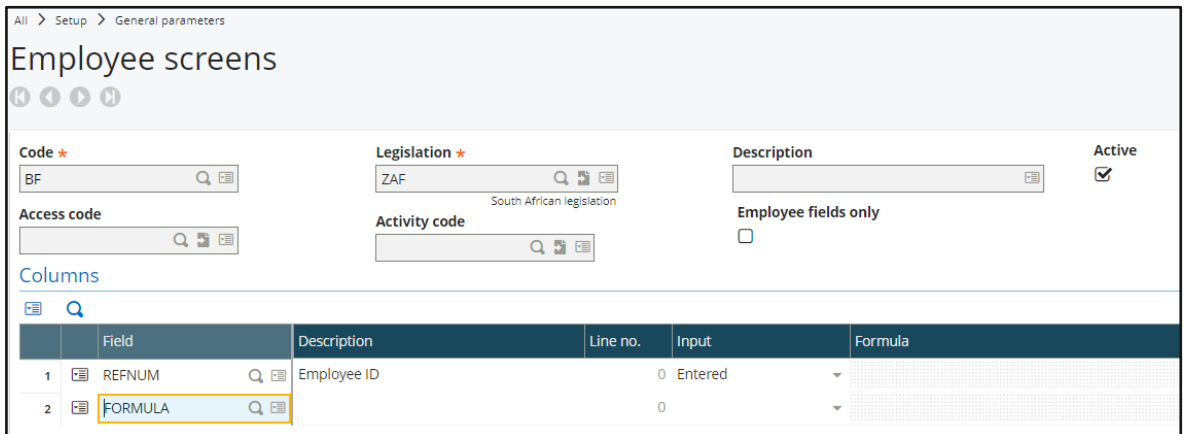


How to know what a field name is:

- Field names can also be found by going to the “screen” or “block” that contains the information required for the report. E.g. Employee code on the Personal data forms.
- Select ESC + F6 to view the field:



- By typing in 'Formula' you can load Variables, Headings, Totals and more complicated fields:



- After you have typed in 'Formula', click on Tab and the following screen will display:

- When you want to insert variables, headings or totals, make sure the Formula type is 'Payroll history'.

- Then select the Type, e.g. variable, heading, total:
 - Variable – This is the variable used on the payslip for input purposes
 - Heading – This is the code found on the payslip tab
 - Total – This is the EMP totals. An example for using this option is when you are selecting an amount for all headings linked to a specific total e.g. Total Income, Total UIF Contribution, Total Deductions, etc.

- Type your variable, heading or total code, or select one:

The screenshot shows a form titled "Payroll". It has a "Formula" section with a checkbox that is not checked. Below that is a "Type" dropdown menu with "Total" selected. At the bottom is a "Code" field containing the text "SALARY_MTD" and a search icon.

- The data type and length will automatically update.
- Enter the period type, e.g. monthly, quarterly etc.

The screenshot shows two sections of the form. The "Period" section on the left has radio buttons for "Of the period" (selected), "Payroll in progress", "Monthly", "Quarterly", "Half-yearly", "Yearly", and "Date to date". Below these is a "Current" text field. The "Data type" section on the right has a "Data type" field with "DCB" entered and a "Length" field with "9.2" entered. There is also a "Local menu no." field at the bottom right.

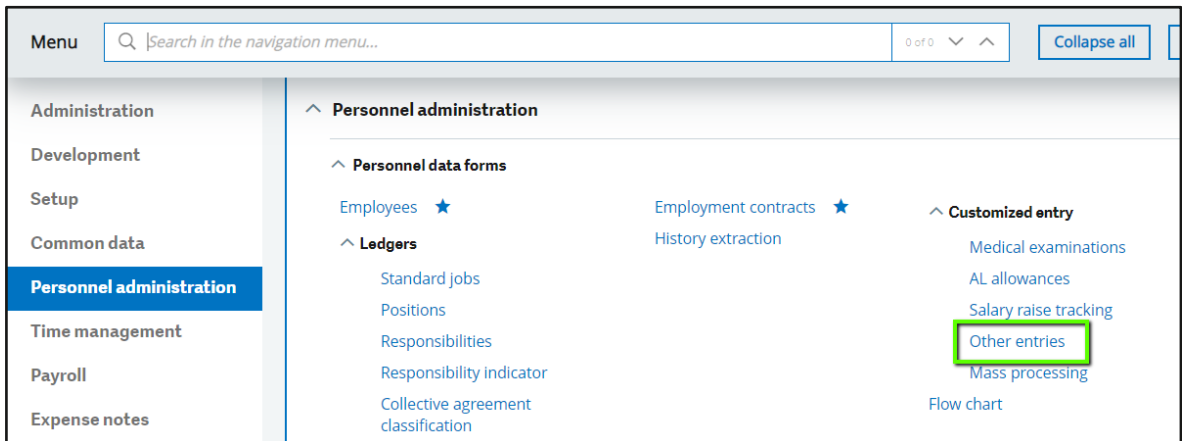
- Add your title to the report heading under formula.

The screenshot shows a form titled "Formula". It has a "Description" field containing the text "Salary". Below that is an "Expression" field with an asterisk next to it, which is currently empty.

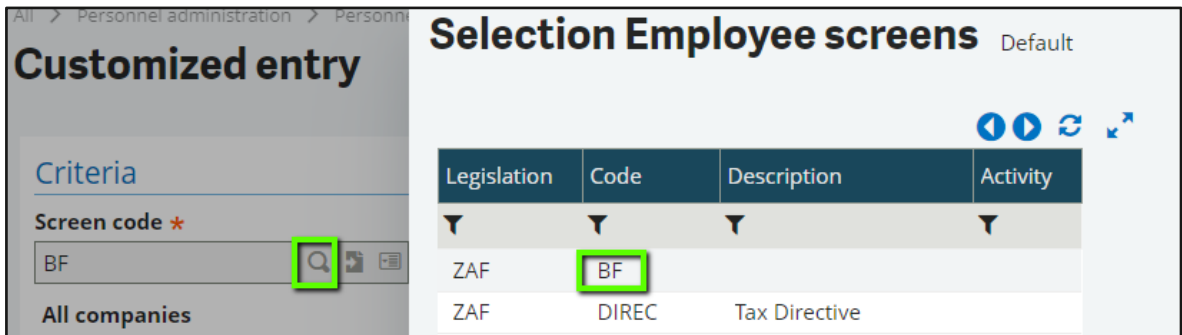
- Click OK.
- Under the expression field you can also enter a calculation by stating the field (the row number) on the report. For example, F06 + F07 to sum those 2 together.
- Click on Save.
- Click on Post.

1.2 Generating a report

Access: *Personnel administration > Personnel data forms > Other entries*



- When selecting a Report click, on the hourglass, a list of reports will be displayed.
- Select the report you would like to generate.



1.3 View report for all Companies and Sites

- Should you wish to view the report for all companies and sites.
- All companies and All Sites will have a \surd next to it.
- Tab through the screen up until the end date.
- Click OK.
- If you would like to select a report for a specific date, complete the period at the bottom where it asks for Start date and End date.

All > Personnel administration > Personnel data forms > Customized entry

Customized entry

SAGE

Criteria

Screen code *
BF

All companies Company *
All sites Site *

Legislation *
Department *
Profile *
Position *
Standard job *

Registration start
Registration end

Population
Other criterion

Requested period

Start date * End date *

Employee population update

New
OK
Close page
Memo
Recall
Delete memo
Utilities
Help

1.4 Print a report for a specific Company, Site or Department

- Remove the tick from All companies.
- Select the specific Company you want to print the report for.
- If you require a specific Site, remove the tick from All sites.
- Select the specific Site.
- If you would like to select a specific department, untick all departments and select the specific department you would like to view.
- If you would like to print the report for one employee only, enter the applicable Employee ID in the 'Registration Start' and 'Registration end' fields. The report will then only print for that one employee.
- The information can then be exported by clicking on the Export button on the right-hand panel.

All > Personnel administration > Personnel data forms > Customized entry

Customized entry

SAGE

Criteria

Screen code *
BF

All companies Company *
CP01

All sites Site *
CP

Legislation *
ZAF
South African legislation

All departments Department *
OPS
Operations

All profiles Profile *

All positions Position *

All standard jobs Standard job *

Registration start
Registration end

Population

New
OK
Close page
Memo
Recall
Delete memo
Utilities
Help