

Sage X3 HR and Payroll V9

Other Entries

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1.0 Other Entry Reports

1.1 Writing a report

Access: Personnel administration > Personnel data forms > Other entries

Administration

- Administration
- Sage X3 People Sites
- Development
- Setup
- Common data
- Personnel administration**
- Time management
- Payroll
- Expense notes
- Profit-sharing
- Total payroll

Navigation page

▲ PERSONNEL DATA FORMS

- Employees
- ▲ Customized entry
 - AL allowances
 - Salary raise tracking
 - **Other entries**
 - Mass processing
- Flow chart

The Customized entry screen will be displayed.

Click on the 'Jump to' button:

Customized entry

Screen

Screen code *

Criteria

All companies Company * All sites Site *

All departments Department * All profiles Profile *

All positions Position All standard jobs Standard job

Registration start Registration end Population

Other criterion

Requested period

Start date * End date *

New

OK

Close page

Memo

Recall

Delete memo

Utilities

Help

The following Screen will be displayed:

Employee screens

Code *
BF

Title
Brighter Futures

Active

Access code

Activity code

Employee fields only

New
Save
Create
Delete
Cancel

- 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.

Employee screens

Code *
BF

Title
Brighter Futures

Active

Access code

Activity code

Employee fields only

Columns

17 Results Display: 500

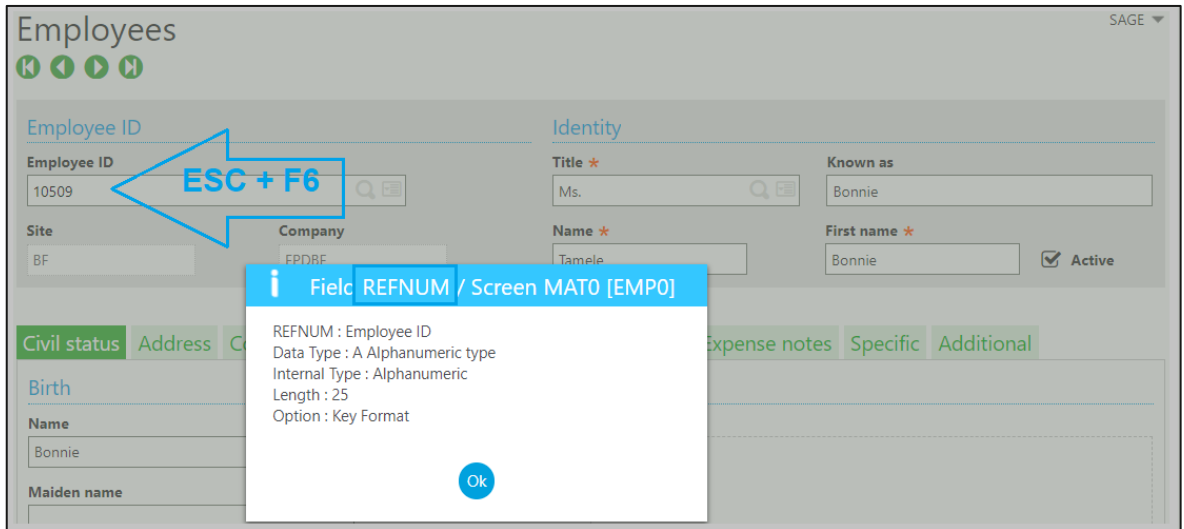
	Field	Title	Line no.	Input	Formula
1	REFNUM	Employee ID	0	Displayed	
2	FORMULA	Salary	0	Displayed	R_E_PACKAGE(1)
3	FORMULA	Travelling	0	Displayed	R_E_TRV_AL(1)
4	FORMULA	Income Incl Tax	0	Displayed	R_E_INC_NTX(1)
5	FORMULA	Basic Correct	0	Displayed	R_E_BA_CORR(1)
6	FORMULA	Paid Salary	0	Displayed	R_D_PAID_SAL(1)
7	FORMULA	Total Earnings	0	Displayed	C_T_EARN_MTD

Selection Employee field dictionary

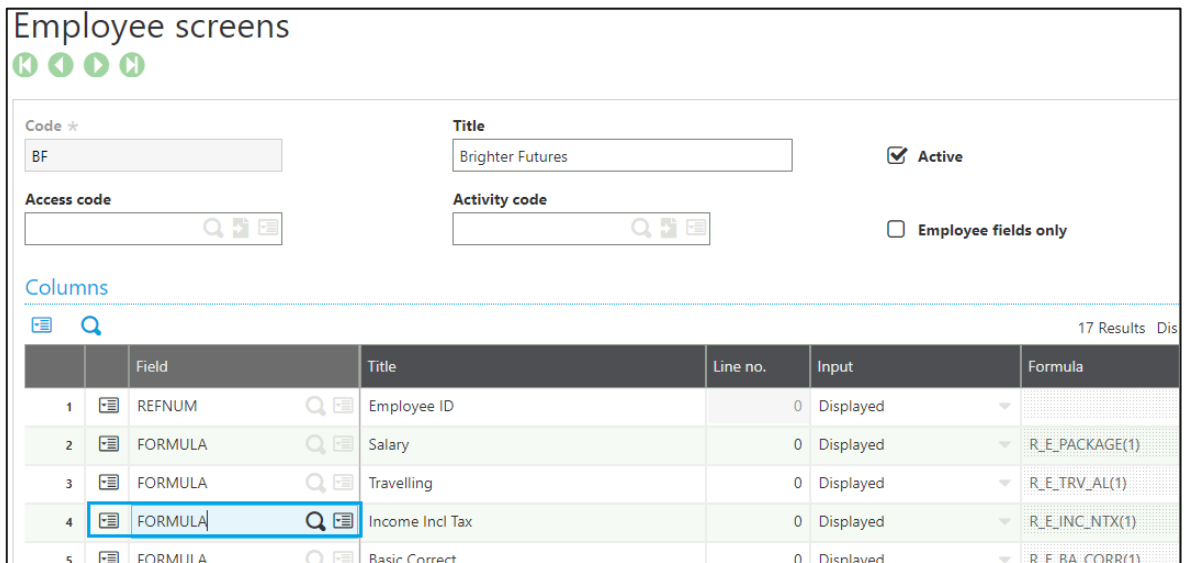
Sequen...	Field	Title	Table	Activity	Active	Selecti...	Ledge...	Back-pay
2040	STATUS	Status	EMPLOYTRY		Yes	No	No	No
2060	SRVTRY	Department	EMPLOTRY		Yes	No	No	No
9060	REFNUM	Employee ID	EMPLOAD	PAY	Yes	No	No	No
9999	RATMIDWRK	PT rate	EMPLOCTR		Yes	Yes	No	No
9999	RAZCUM	RTZ of totals	EMPLOCTR	PAY	Yes	Yes	No	No

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:

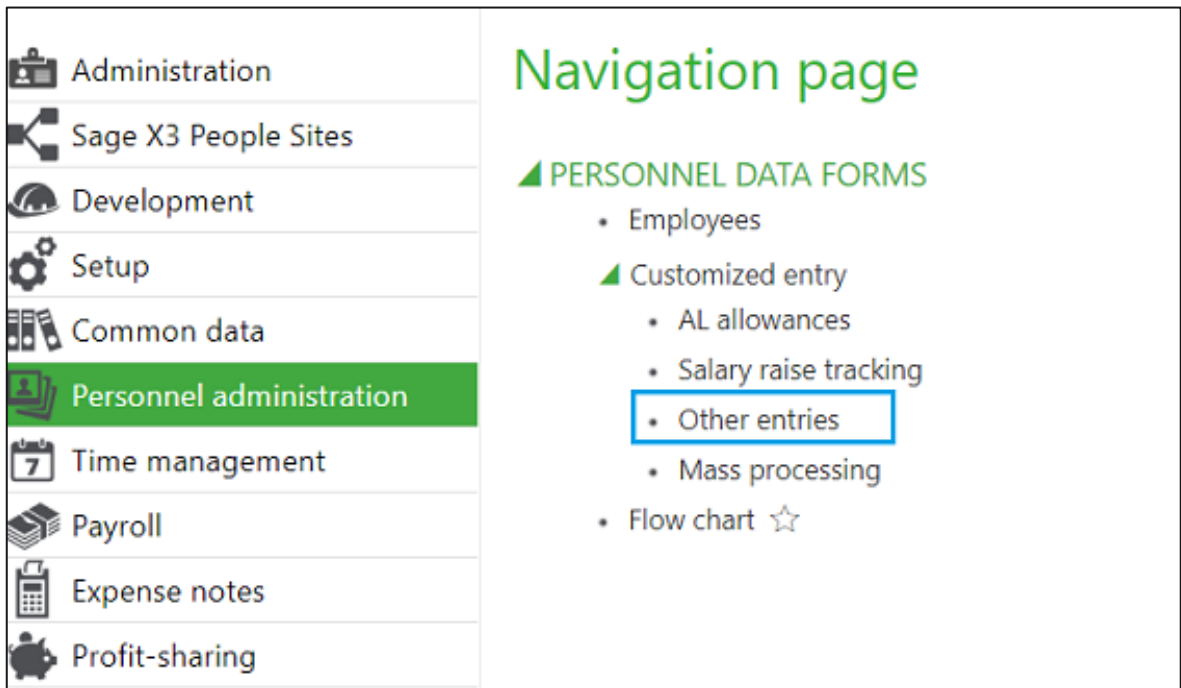


- After you have typed in “Formula” click on tab and the following screen will display:

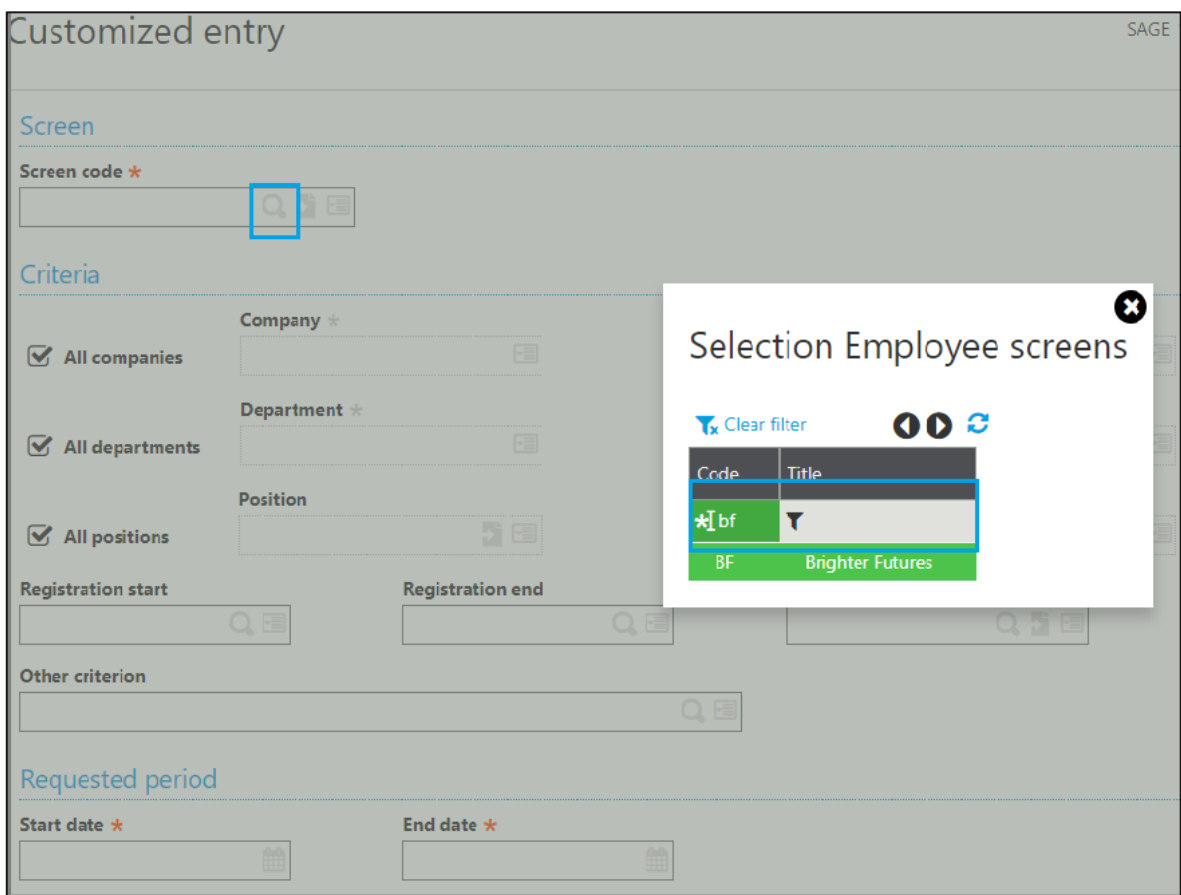
- When you want to insert variables, headings or totals make sure the Formula type is “Payroll history”.
- Then select the Type, e.g. variable, heading, total:
 - Variable – This is the variable used on the payslip for input purposes
 - Heading – This is the code found on the payslip tab
 - Total – This 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 data type and length will automatically update.
- Enter the period type, e.g. monthly, quarterly etc.
- Add your title to the report heading under formula.
- 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 ✓ 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.

Customized entry SAGE

Screen

Screen code *

BF
Brighter Futures

Criteria

<input checked="" type="checkbox"/> All companies	Company * <input type="text"/> <input type="button" value="List"/>	<input checked="" type="checkbox"/> All sites	Site * <input type="text"/> <input type="button" value="List"/>
<input checked="" type="checkbox"/> All departments	Department * <input type="text"/> <input type="button" value="List"/>	<input checked="" type="checkbox"/> All profiles	Profile * <input type="text"/> <input type="button" value="List"/>
<input checked="" type="checkbox"/> All positions	Position <input type="text"/> <input type="button" value="List"/>	<input checked="" type="checkbox"/> All standard jobs	Standard job <input type="text"/> <input type="button" value="List"/>

Registration start **Registration end** **Population**

Other criterion

Requested period

Start date * **End date ***

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.

Customized entry SAGE

Screen

Screen code *
BF Brighter Futures

Criteria

<input type="checkbox"/> All companies	Company * FPDBF Brighter Futures	<input type="checkbox"/> All sites	Site * BF FPD
<input checked="" type="checkbox"/> All departments	Department *	<input checked="" type="checkbox"/> All profiles	Profile *
<input checked="" type="checkbox"/> All positions	Position	<input checked="" type="checkbox"/> All standard jobs	Standard job

Registration start Registration end Population

Other criterion

Requested period

Start date * 06/01/2018	End date * 06/30/2018
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- The information can then be exported by clicking on the Export button on the right-hand panel.