sage WageEasy

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Performing a house clean

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Purpose: You may need to perform a houseclean if your database is large and performance is slowing, or due to the sale of a business.

The House clean function is designed to remove payslips and terminated employee records from the previous financial years. Before you commence the procedure we would recommend you take two (2) backups of your current database to archive.

Steps in Performing a House Clean

In Sage WageEasy go to File / Maintenance / House cleaning

The House Cleaning Wizard will then step you through the process / click next
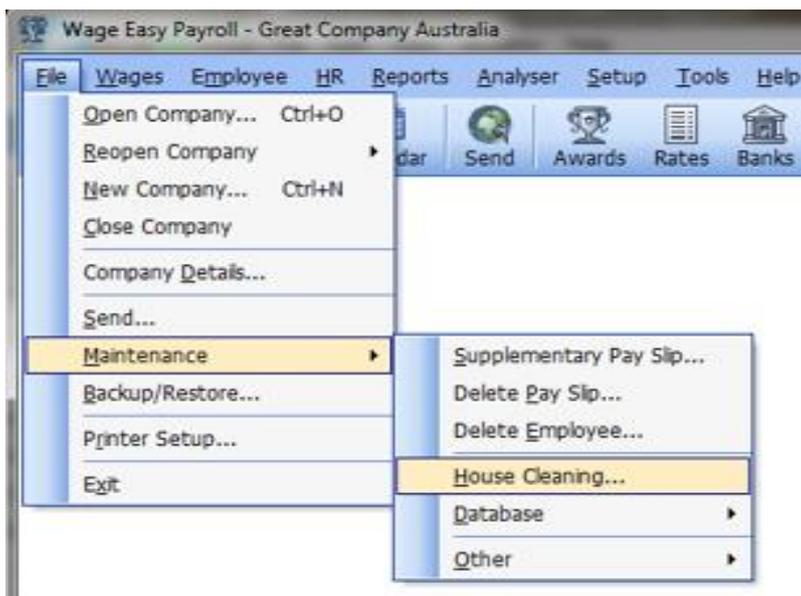
1. Select the financial year of data you would like to remove. Start will the oldest year of data and move forward, if you would like to remove more than one year of data, then repeat the processing one year at a time.

I. If you were housecleaning due to the database being large, we would recommend that you leave at least 12 months of prior data for easy referral and select the first option at step 3.
II. If you are housecleaning due to a change of ownership you will need to remove all financial data to the end of the current financial year end. Select the second option at step 3.
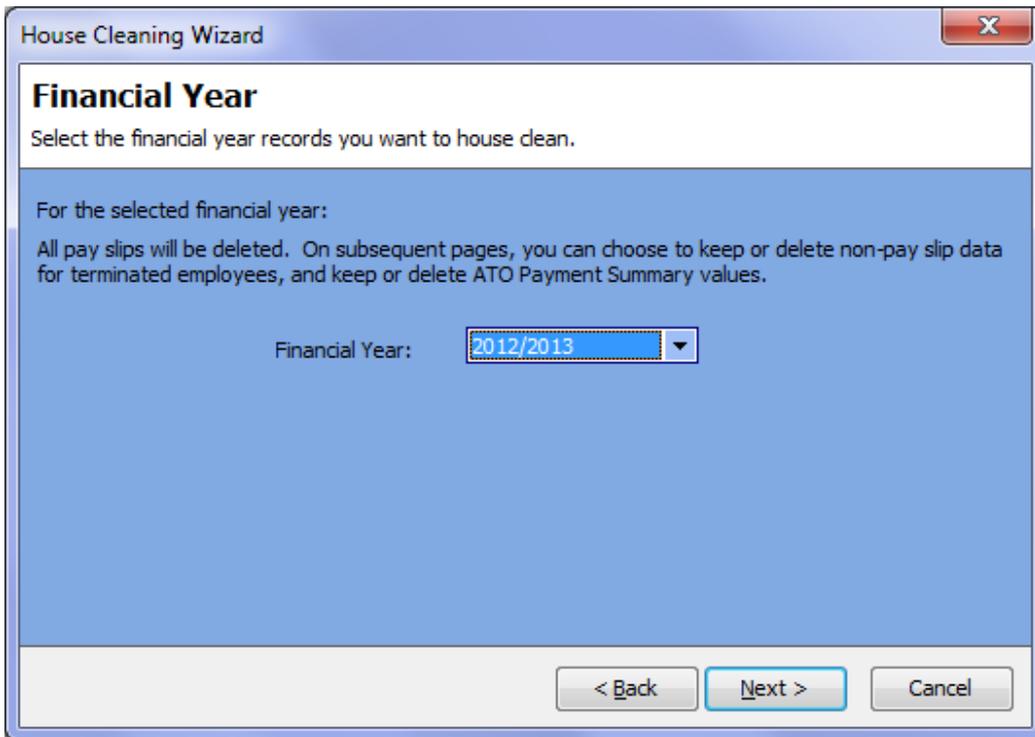
2. Select any employees that are terminated to delete from your system. It may be worth running an unpaid employee report (reports menu / unpaid employees) to see if any employees have not been paid for a large length of time, and terminating them. Then could then be removed from the system as part of this process.

Prepared by: Sage WageEasy Support, 09/02/16

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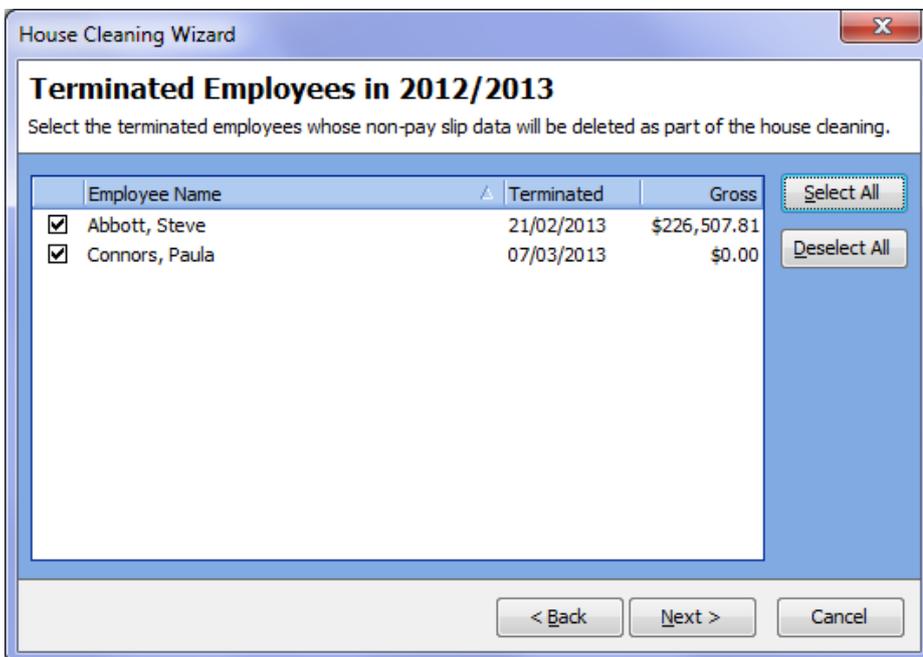
3. Please read the options carefully / then click next
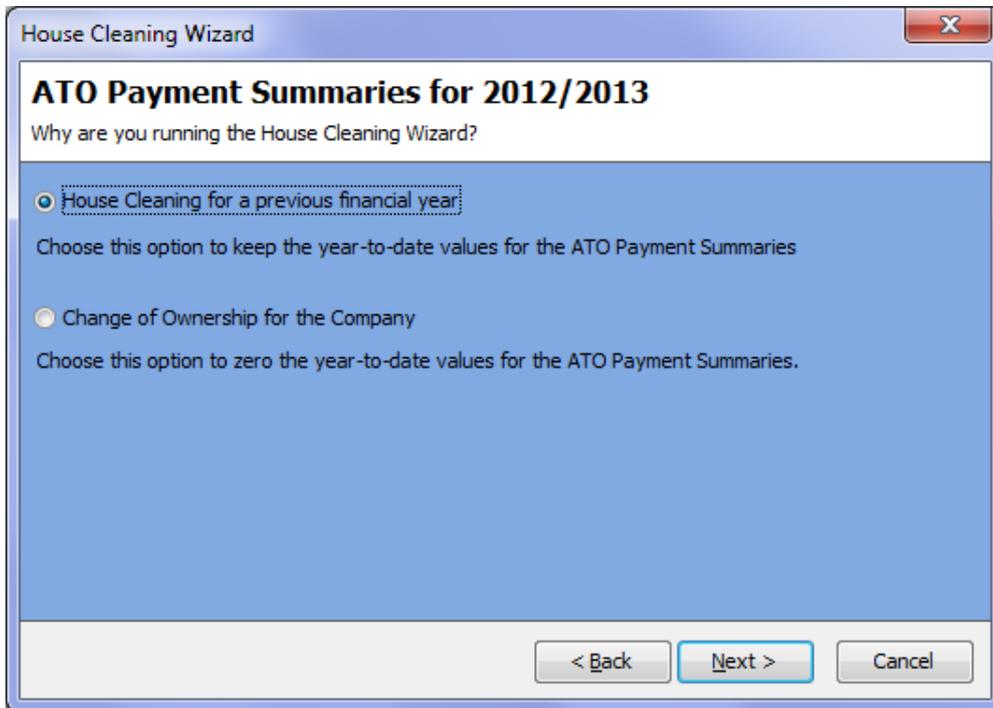
4   Tick both the 'House clean Audit details' and 'Proceed with Housecleaning' and then select next.

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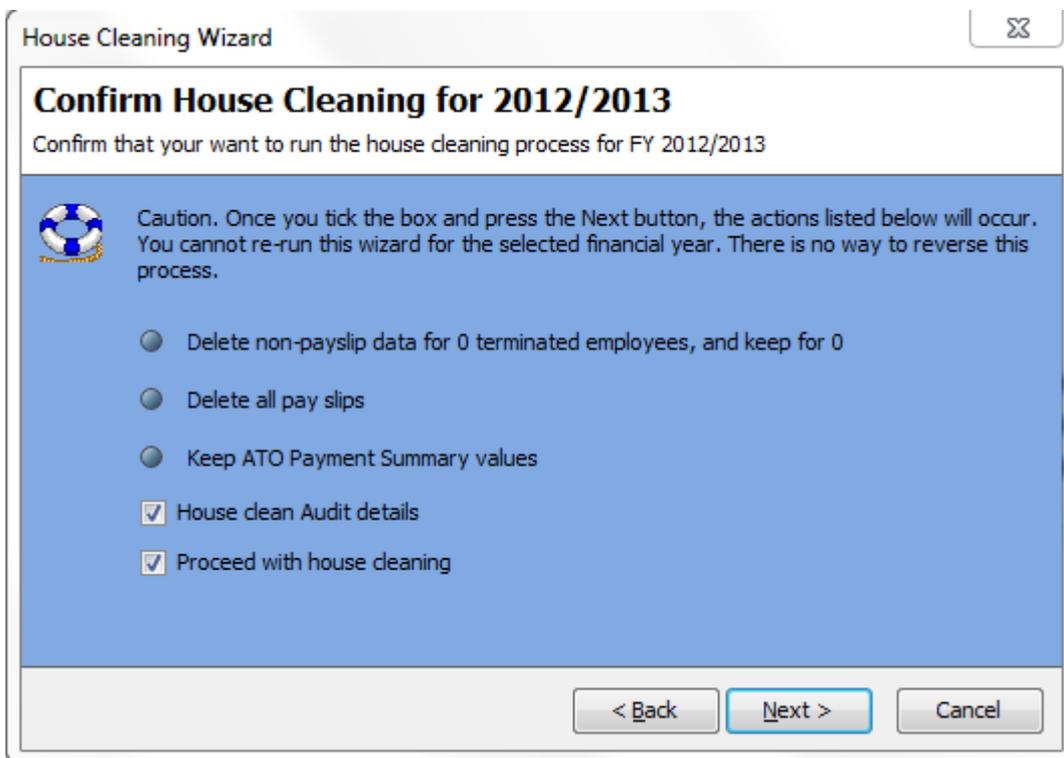
5. Please note the warning and select the Proceed with house cleaning and click next to finish off.

6. At the end of this process you will be prompted to compact your database. We recommend you take this course of action as it will further enhance the everyday operation of your database.

7. Once completed, select Finish and go on with your processing or proceed to repeat the process for subsequent financial years.

Notes:

1. Currently a houseclean will not remove employees from your database that have a termination date typed in their file. It will remove only those employees terminated through the termination wizard.
In order to remove these employees from your database, if required, please delete their files from the system using the instructions on the following pages.

2. If Leave Without Pay records exist in your database, you must run a LWOP report prior to housecleaning as the removal of payslips with Leave Without Pay records may result in your employees leave accruals re-adjusting. We recommend you also run a Leave Entitlement report to ensure the leave totals remain intact for employees.

3. If your database is completely house cleaned of all payslip records, active allowances will need to be reactivated within employee files.

Removing Employee records where termination date typed in manually

Select File | Maintenance | Delete Employee
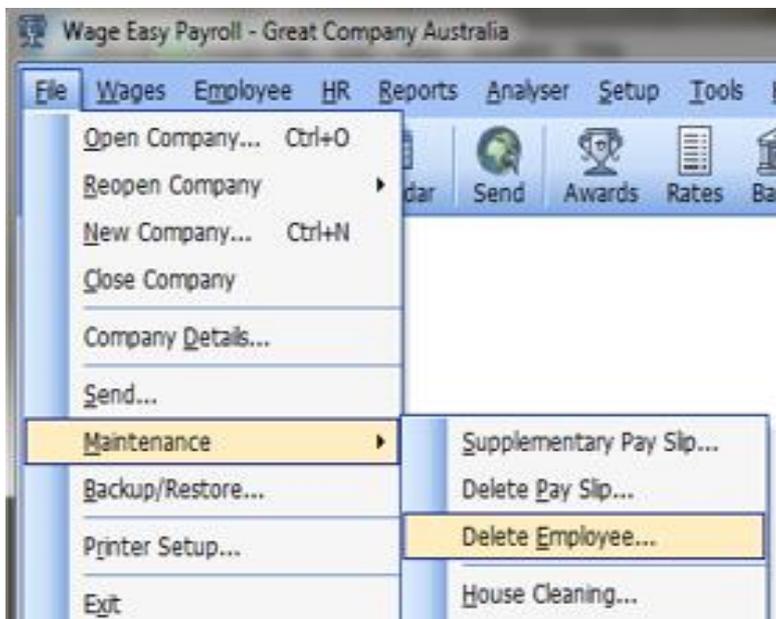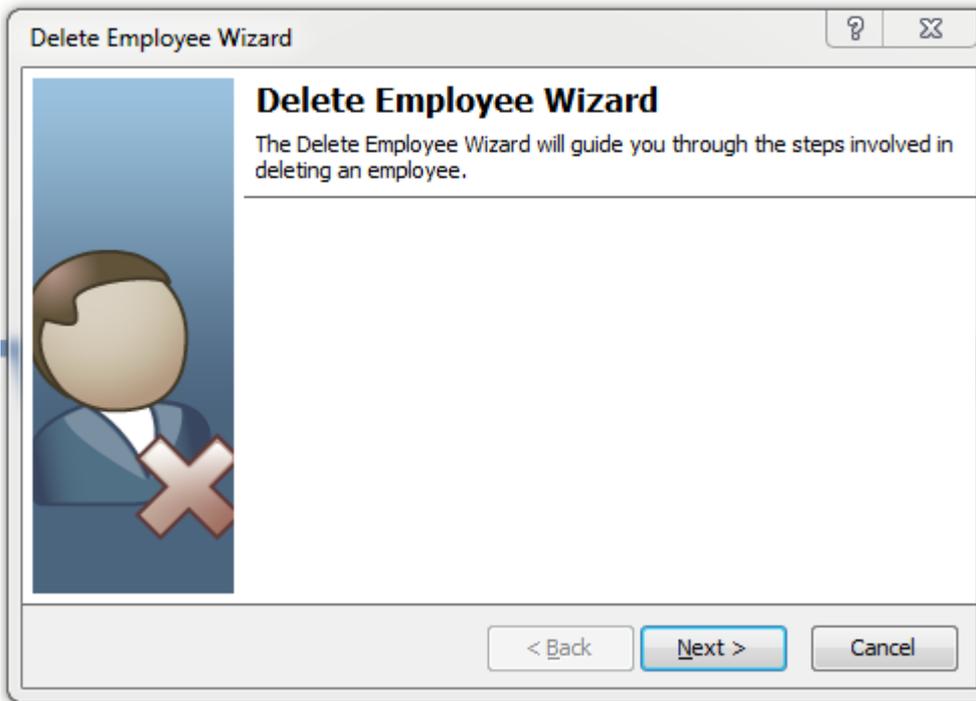
Click next to select the employee for removal.

It is imperative that you check and double check the employee details for the employee you are selecting as once they are deleted from the system, all information pertaining to them will be lost from your system.
If payslips exist in the financial year you have chosen the following screen will appear:

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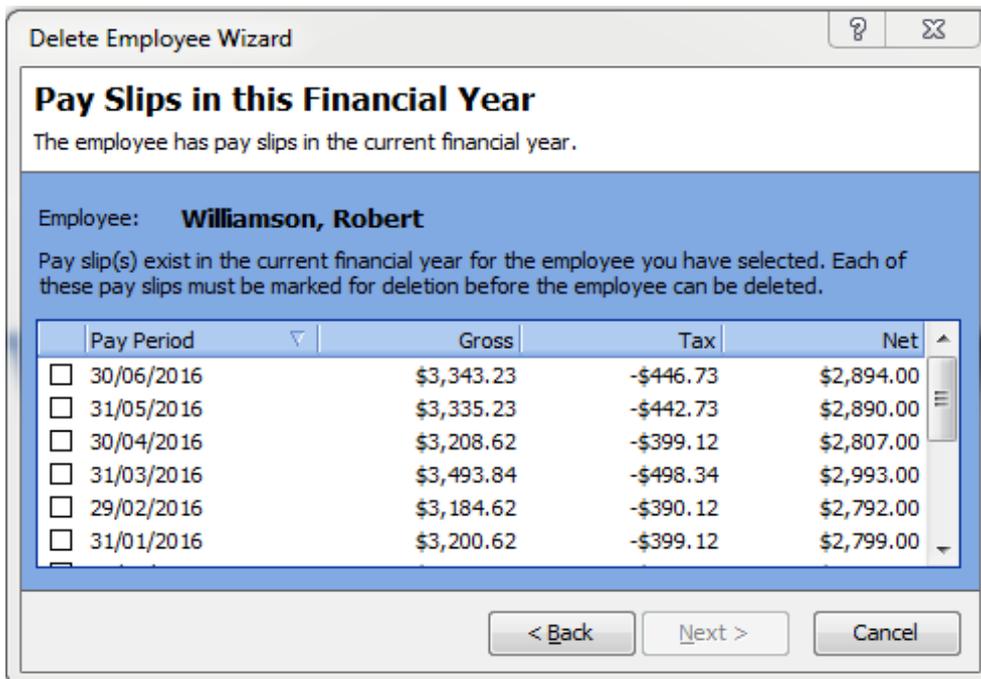
You can drill down to check these payslips. Once you are satisfied you would like them removed, please tick each of the boxes and click Next.
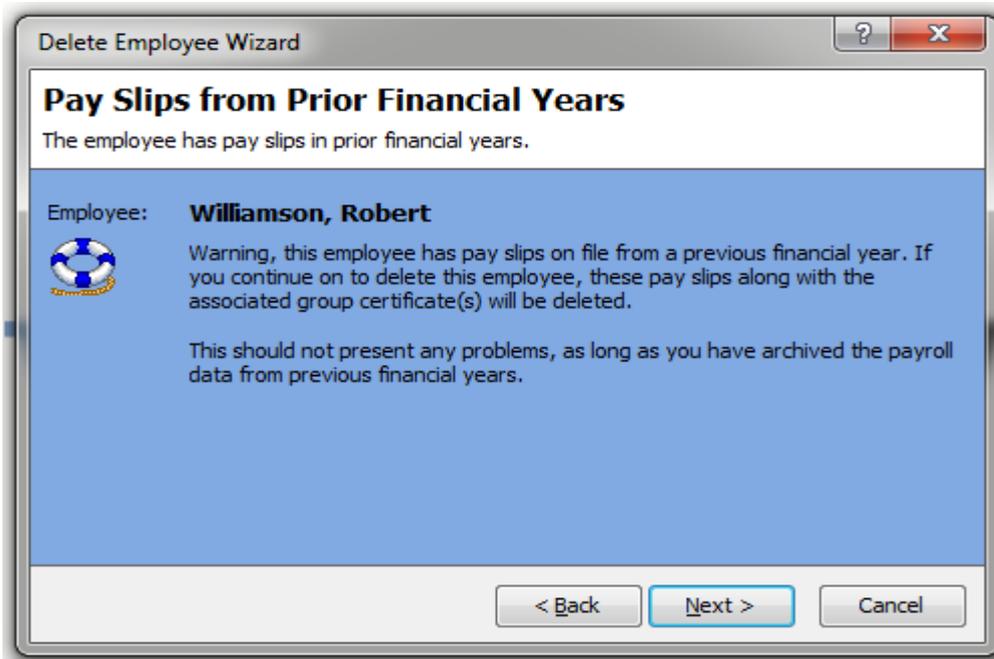
Please ensure you are happy with the employee details you are removing before clicking next.
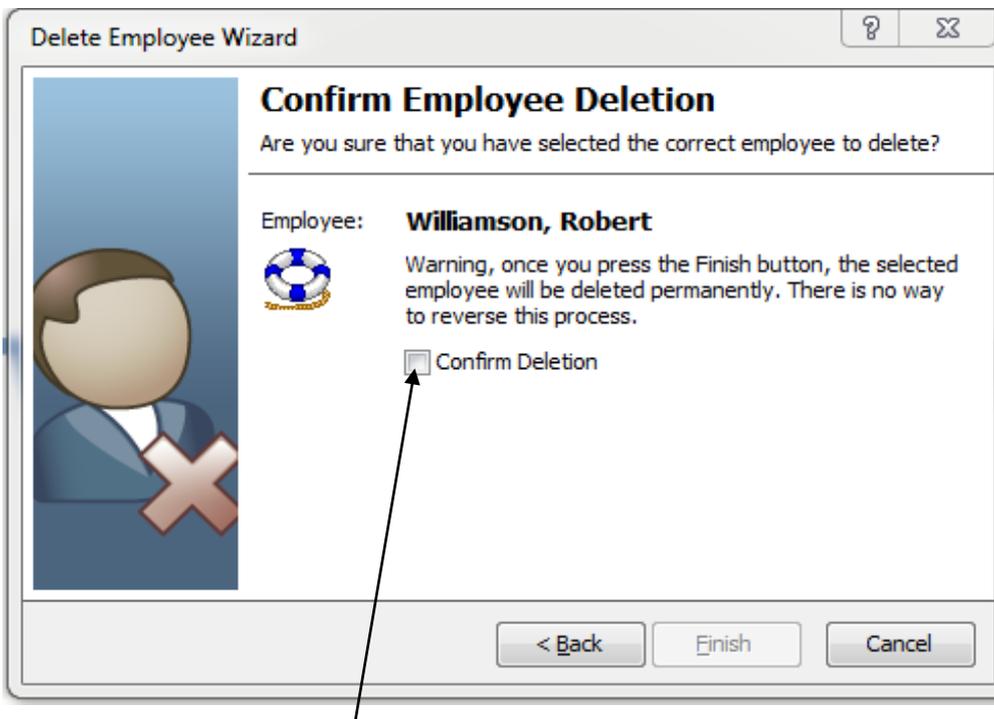
If you are happy, select Confirm Deletion and move next to remove this employee and all their records from your database.