sage WageEasy

Sage WageEasy Performing a house clean

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

Elle	Wages Employee HR	Re	ports	<u>Analys</u>	er <u>S</u> etur	p <u>T</u> ools	Hel
	Open Company Ctrl+O Reopen Company New Company Ctrl+N Glose Company Company Details	•	dar	Send	Awards	Rates	Banks
	Maintenance			Supplem	entary Pa	/ Slip	
	Backup/Restore			Delete P	ay Slip		
Printer Setup				Delete E	mployee		
				House C	leaning		
-		-		Database	8		•
				Other			

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.

Sage WageEasy– *Preforming a house clean* **Prepared by:** Sage WageEasy Support, 09/02/16 Last updated: 09/02/16

This Factsheet has been prepared with the intention of providing you with accurate, consistent and clear information on how to use or set up Sage WageEasy to meet particular circumstances. Any award information or interpretation contained in this Factsheet is based on information provided to us and we recommend consulting the relevant Award or EBA and/or obtaining professional advice from your industry association to verify this information.

sage WageEasy

House Cleaning Wizard
Financial Year Select the financial year records you want to house clean.
For the selected financial year: All pay slips will be deleted. On subsequent pages, you can choose to keep or delete non-pay slip data for terminated employees, and keep or delete ATO Payment Summary values.
Financial Year:

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.

н	ouse	Cleaning Wizard			×			
•	Terminated Employees in 2012/2013							
Select the terminated employees whose non-pay slip data will be deleted as part of the house cleanin								
		Employee Name	△ Terminated	Gross	Select All			
	✓	Abbott, Steve	21/02/2013	\$226,507.81				
	✓	Connors, Paula	07/03/2013	\$0.00	Deselect All			
			< <u>B</u> ack	<u>N</u> ext >	Cancel			

Sage WageEasy- Performing a house clean

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

Last updated: 09/02/16

Page 2 of 6

sage WageEasy	/
---------------	---

3. Please read the options carefully / then click next

Ho	House Cleaning Wizard					
A wł	ATO Payment Summaries for 2012/2013 Why are you running the House Cleaning Wizard?					
0 0	House Cleaning for a previous financial year hoose this option to keep the year-to-date values for the ATO Payment Summaries					
d) Change of Ownership for the Company hoose this option to zero the year-to-date values for the ATO Payment Summaries.					
	< <u>B</u> ack <u>N</u> ext > Cancel					

4 Tick both the 'House clean Audit details' and 'Proceed with Housecleaning' and then select next.

House Cl	eaning Wizard	J					
Confi Confirm t	Confirm House Cleaning for 2012/2013 Confirm that your want to run the house cleaning process for FY 2012/2013						
٢	Caution. Once you tick the box and press the Next button, the actions listed below will occur. You cannot re-run this wizard for the selected financial year. There is no way to reverse this process.						
	Oelete non-payslip data for 0 terminated employees, and keep for 0						
	Oelete all pay slips	1					
	Keep ATO Payment Summary values	ļ					
	✓ House clean Audit details						
	✓ Proceed with house cleaning						
	< <u>B</u> ack <u>N</u> ext > Cancel						

Sage WageEasy- Performing a house clean

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

Last updated: 09/02/16

Page 3 of 6



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 readjusting. 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



Sage WageEasy– Performing a house clean

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

Last updated: 09/02/16

Page 4 of 6





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:

	Delete Employee Wi	zard			8 23
	Pay Slips in t The employee has pay	his Finaı (slips in the a	ncial Year urrent financial year.		
	Employee: Willia Pay slip(s) exist in the these pay slips must b	mson, Rob current finan be marked for	ert icial year for the emp deletion before the o	oloyee you have sele employee can be dele	cted. Each of eted.
l	Pay Period	∇	Gross	Tax	Net 🔺
l	30/06/2016		\$3,343.23	-\$446.73	\$2,894.00
l	31/05/2016		\$3,335.23	-\$442.73	\$2,890.00
	30/04/2016		\$3,208.62	-\$399.12	\$2,807.00
l	31/03/2016		\$3,493.84	- \$ 498.34	\$2,993.00
	29/02/2016		\$3,184.62	-\$390.12	\$2,792.00
	31/01/2016		\$3,200.62	-\$399.12	\$2,799.00 🚽
	· · ·		•		
			< <u>B</u> ac	k <u>N</u> ext >	Cancel

Sage WageEasy- Performing a house clean

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

Last updated: 09/02/16

Page 5 of 6



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.

Delete Employee W	izard		8 22
	Confirm Are you sure	Employee Deletion that you have selected the correct employee	to delete?
	Employee:	Williamson, Robert Warning, once you press the Finish button, employee will be deleted permanently. There to reverse this process.	the selected e is no way
		< <u>B</u> ack <u>F</u> inish	Cancel

If you are happy, select Confirm Deletion and move next to remove this employee and all their records from your database.

Sage WageEasy- Performing a house clean

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

Last updated: 09/02/16

Page 6 of 6