



HCM Cloud Housekeeping Overview

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Agenda

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Housekeeping Items



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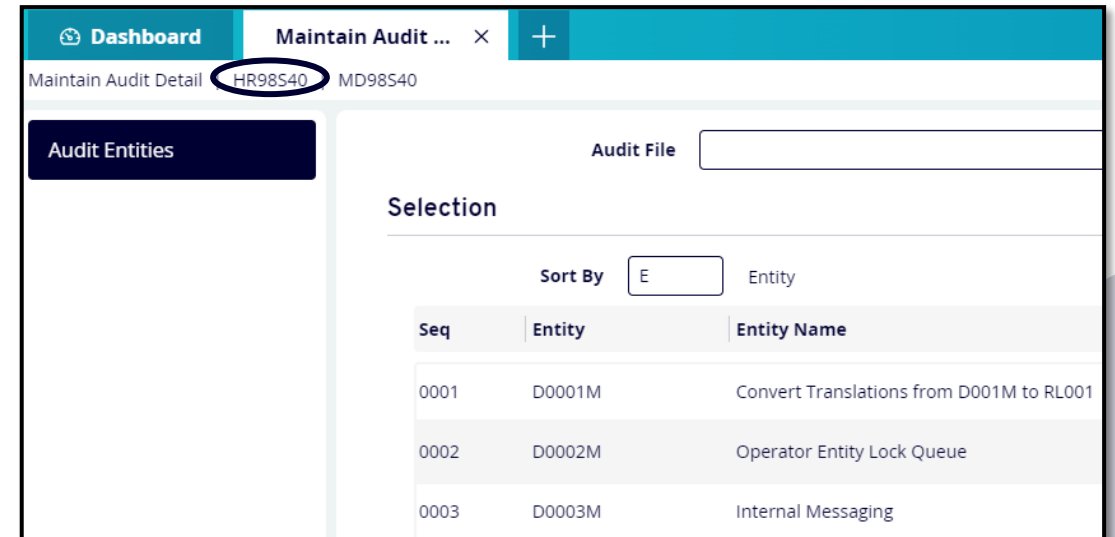
Audit cleardown

HCM Cloud has powerful capability to capture activity against employees and system configuration changes. However, audit data can quickly build up and slow down the core processing.

Suggestion:

- Use task **HR98S40 (Maintain Audit Entities)** to identify which tasks are being audited
- Review the configuration of your audit; are you auditing unnecessary fields? If so, turn these off
- Delete unwanted/historical audit data on a regular basis

N.B. Only Zellis Database Administrators (DBAs) can delete unwanted historical audit data from the HCM Cloud environments hosted by Zellis.



The screenshot displays the 'Maintain Audit Entities' interface. The top navigation bar includes 'Dashboard' and 'Maintain Audit ...'. Below the navigation bar, there is a tab labeled 'Maintain Audit Detail' with a sub-tab 'HR98S40' circled in red. The main content area is divided into two sections: 'Audit Entities' on the left and 'Selection' on the right. The 'Selection' section includes a 'Sort By' dropdown set to 'E' and a table with the following data:

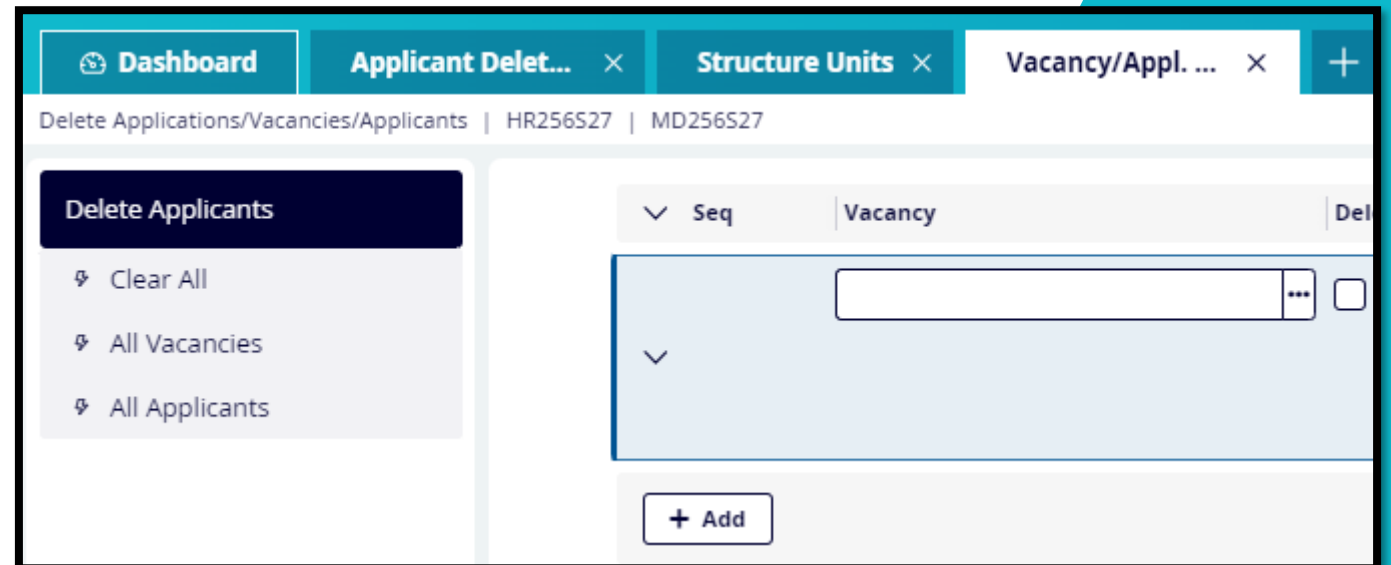
Seq	Entity	Entity Name
0001	D0001M	Convert Translations from D001M to RL001
0002	D0002M	Operator Entity Lock Queue
0003	D0003M	Internal Messaging

Web recruitment (applicant and vacancies)

Applicant and vacancy data builds up over time in the recruitment module. Historic applicant and closed vacancy data should be regularly cleared to remain GDPR compliant.

Suggestion:

- We recommend that you delete applicant data and closed vacancy data that is no longer required using **HR256S27** (Vacancy/Application deletion) and run the Web Recruitment data protection tasks



Bank account history deletion

Bank account details can be deleted before the 7-year GDPR limit is reached. GDPR advises that single pieces of data can be removed manually.

Suggestion:

- Update GDPR settings in system control to allow bank account deletion
- System Control > User Control > System > GDPR Settings and check Bank Account History Deletion is enabled.
- Clear down data at the end of each tax year using **HR211S40 (Employee Bank Detail History Deletion)**

The screenshot shows a web application interface for 'Employee Bank Details History Deletion'. The top navigation bar includes tabs for 'Dashboard', 'Applicant Delet...', 'System Control', and 'Emp Bank Hist...'. Below the navigation bar, the page title is 'Employee Bank Details History Deletion | HR211S40 | MD211S40'. On the left, there is a dark blue button labeled 'Bank Dtls. Deletion'. The main content area is titled 'Employee and List Selection : Deletion Selection'. It features a 'Deletion Date' label next to a text input field. Below the input field, a message states: 'Historic Employee Bank Accounts changed prior to the given Deletion Date and before the Current Tax Year will be deleted.'

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Costing cleardown

Costing tables within HCM Cloud can become exceptionally large, especially if preview costing is used.

Suggestion:

- Clear down data on a regular basis (once the journals have all been posted and any queries resolved) using task **HR22S40** (Costing Cleardown)

N.B. If the data is erroneously deleted it can be recreated using standard Current or Historic Costing functionality.

The screenshot shows the 'Costing Cleardown' task interface in HCM Cloud. The top navigation bar includes 'Dashboard' and 'Costing Cleardo...'. Below the navigation bar, the breadcrumb trail shows 'Clear Costing' followed by 'HR22S40' (which is circled) and 'MD22S40'. The main content area is titled 'General' and contains several input fields and checkboxes. The 'Type' field is set to 'CP' and is circled. The 'Tax Period From' field is followed by a date separator and a 'To' field. The 'Pay Type' field is a dropdown menu. The 'Expenses Run No. From' field is followed by a dropdown menu and a 'To' field. At the bottom, there are three checkboxes: 'Do you wish to remove Reversed Costing (Y/N)?', 'Do you wish to remove Retrospective Costing (Y/N)?', and 'Do you want to reset to enable Re-Cost (Y/N)?'.

Hiding and deleting FPS submissions

FPS data can be hidden for ease of searching for historical submissions or deleted to comply with GDPR and HMRC compliance.

Suggestion:

- Hide FPS submissions once your end of year has been completed using task **HR209S27** (FPS Hide and Delete)
- Delete FPS submission data once the 6 years plus current tax year threshold has been met using task **HR209S27** (FPS Hide and Delete) and entering 'Y' in the 'DEL' column



The screenshot shows a web application interface with a table of FPS submissions. The table has columns for Seq, Run No., Control Group, Created, Hide, Del, and Actions. The first row is highlighted, showing Seq 00001, Run No. 01000002, Control Group UK Monthly 001, and Created 13/10/2021. The Hide and Del columns for this row contain empty checkboxes. The table is part of a larger interface with a header bar showing 'HR209S27 | MD209S27' and a 'Display' button.

Seq	Run No.	Control Group	Created	Hide	Del	Actions
00001	01000002	Control Group UK Monthly 001	13/10/2021	<input type="checkbox"/>	<input type="checkbox"/>	
00002	01000003	Control Group UK Monthly 001	13/10/2021			
00003	01000004	Control Group UK Weekly 002	13/10/2021			
00004	01000005	Control Group UK Monthly 001	08/04/2022			

MyView forms

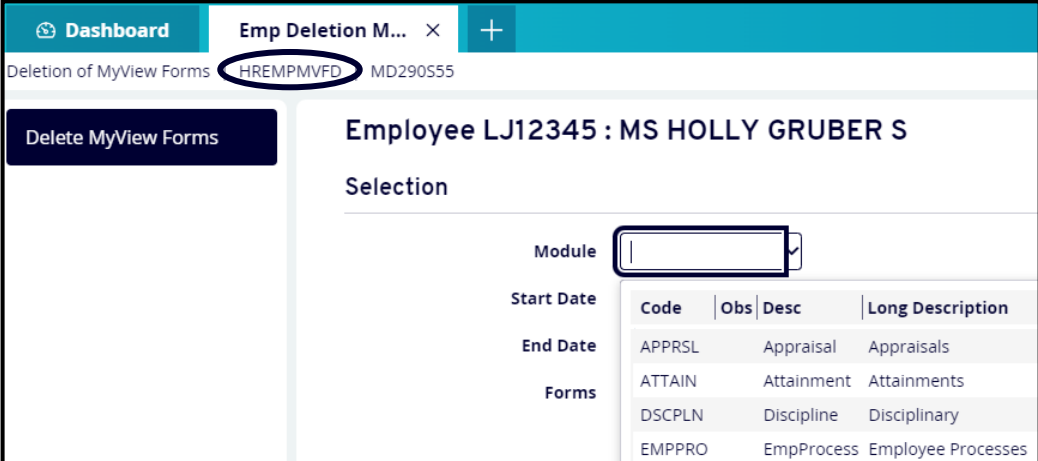
MyView is an excellent tool to allow your employees and managers to self-serve the submission of data. However, the volume of historical forms can quickly build up and impact the efficient processing of MyView.

Suggestion:

- There are two ways to delete the forms:
 - Task **HREMPMVFD** (Employee Deletion MyView Forms) deletes forms at employee level
 - Task **HR290S55** (Delete MyView Forms) deletes forms at module level

N.B. The deletion of MyView forms only deletes the form itself, the data submitted remains within the system.

However, this isn't true for MyForms, this data will be removed from both MyView and HCM Cloud.



The screenshot shows a web interface for deleting MyView forms. The top navigation bar includes a 'Dashboard' link and a tab for 'Emp Deletion M...'. Below the navigation, there's a breadcrumb trail: 'Deletion of MyView Forms' > 'HREMPMVFD' > 'MD290S55'. The 'HREMPMVFD' link is circled. On the left, there's a dark blue button labeled 'Delete MyView Forms'. The main content area is titled 'Employee LJ12345 : MS HOLLY GRUBER S' and 'Selection'. Below this, there's a 'Module' dropdown menu with a checkmark icon. To the right, there's a table with columns 'Code', 'Obs', 'Desc', and 'Long Description'. The table lists four forms: APPRSL (Appraisal), ATTAIN (Attainment), DSCPLN (Discipline), and EMPPRO (EmpProcess).

Code	Obs	Desc	Long Description
APPRSL		Appraisal	Appraisals
ATTAIN		Attainment	Attainments
DSCPLN		Discipline	Disciplinary
EMPPRO		EmpProcess	Employee Processes

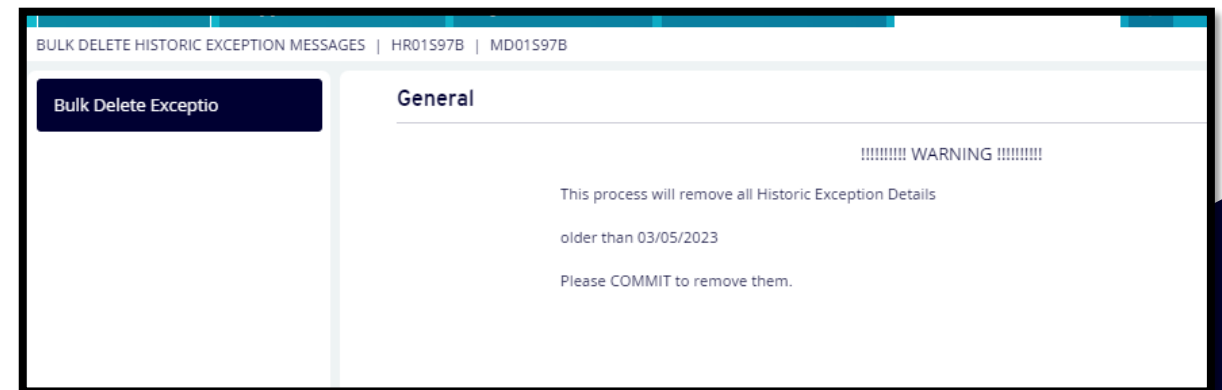
Pay calculate exception messages

Each time payroll is calculated, any exception messages produced are stored in the database. Over time, the size of the tables in which these messages are stored can become problematic.

Suggestion:

- There are two ways to delete pay calculate exception messages
 - Task **HR01S97B** (Bulk Delete exception messages) deletes forms on demand
 - Automating the task in the Task Scheduler (**HR373S01**) using the process **HR01U97B** to delete exception messages on a regular basis

N.B. The number of days the task/process clears back to is pre-defined in system control.



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Deleting payslip history

There is a statutory obligation to keep payslip history for HMRC and/or Revenue Commissioners audit purposes, both currently require six tax years plus the current year to be retained.

Suggestion:

- Once this period has past, delete the data using task **HR120S10** (Delete Payslip History)

The screenshot shows a web-based system administration interface. At the top, there is a navigation bar with tabs: 'Dashboard', 'System Adminis...', and 'Delete Payslip ...'. Below the navigation bar, the breadcrumb path 'Delete Payslip History' is followed by 'HR120S10' (which is circled in red) and 'MD120S10'. On the left side, there is a dark blue button labeled 'Delete Payslip Histo'. The main content area is titled 'General' and contains several input fields: 'Pay Type' (a dropdown menu with a checkmark icon), 'From Year' (a text box with a three-dot menu icon), 'To Year' (a text box with a three-dot menu icon), 'From Period' (a text box), and 'To Period' (a text box).

Structure units

We recommend that you obsolete all structure units that are not in use. This should be an ongoing activity and included in your processes when making any changes to structures or hierarchy.

Suggestion:

- Use task **HR31S1** (Maintain Structure Unit Basic Details) to add an obsolete date to any structure units no longer in use

The screenshot shows the 'Structure Units' form in SAP. The 'General' tab is active. The 'Group' field is set to 'PRPG'. The 'Short Description' field is also set to 'PRPG'. The 'Long Description' field contains 'Test Structure'. The 'Obsolete Date' field is highlighted with a red box and contains the date '17/10/2023'. Other fields include 'Hierarchy View', 'Structure Slip Msg ID', 'Costing Detail', and 'Employer'.

Field	Value
Group	PRPG
Short Description	PRPG
Long Description	Test Structure
Obsolete Date	17/10/2023
Hierarchy View	
Structure Slip Msg ID	
Costing Detail	
Employer	

Posts

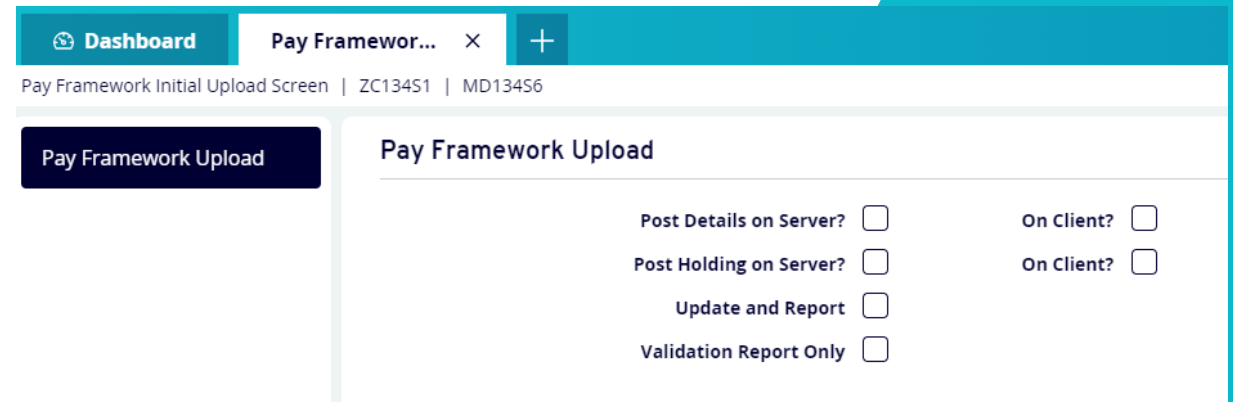
We recommend that you obsolete all posts that are not in use. This should be an ongoing activity and included in your processes when making any changes to your posts

Suggestion:

- There are two ways to apply obsolete dates:
 - Task **HRPOST** (Posts) and add in the obsolete dates to your individual posts
 - Task **HR134S1** (Pay Framework Upload) to import obsolete dates against post details

N.B. You need to have a licence key to use the Pay Framework functionality.

The template to be used for Pay Framework upload will need to be created and structured as specified in the Help Text



The screenshot shows a web application interface for the 'Pay Framework Upload' screen. The top navigation bar includes a 'Dashboard' link and a 'Pay Framework...' tab. Below the navigation bar, the page title is 'Pay Framework Initial Upload Screen | ZC134S1 | MD134S6'. The main content area features a 'Pay Framework Upload' button on the left and a form on the right. The form contains four checkboxes for 'Post Details on Server?', 'Post Holding on Server?', 'Update and Report', and 'Validation Report Only'. Each checkbox is accompanied by an 'On Client?' checkbox.

Option	On Client?
Post Details on Server?	<input type="checkbox"/>
Post Holding on Server?	<input type="checkbox"/>
Update and Report	<input type="checkbox"/>
Validation Report Only	<input type="checkbox"/>

Document storage

Due to the nature of documents stored, document storage can become large and potentially require repeated increases in storage.

Suggestion:

- We recommend enabling document auto-deletion to allow documents to be automatically deleted from document storage. This can be configured within System Control > User Control > Web Applications > Doc Storage and scheduling **HR296U14** within the task scheduler
- We also recommend setting up a scheduled task to monitor document storage utilisation enabling automatic alerts to be used when nearing capacity
- Additionally, you can enable auto-resizing of images in HCM Cloud and MyView to compress them into a manageable size and reduce the build-up of Document Storage capacity

N.B. You can define retention periods for individual Doc Storage categories if they differ to the default retention period in the **Document Category Auto-Deletion** window.

Leavers control groups

If leavers remain within the main control group, they will continue to be included in each calculation run. A leaver payroll is a control group where ex-employees can be archived – this group does not need to be processed.

Suggestion:

- Move historic leavers into a separate control group
 - **Only** move the leavers at the end of the tax year, after all returns have been completed
 - **Only** move them if no payments after leaving are anticipated e.g. share vesting
 - An RRS report can be built to capture any employees who have been moved to a leaver control group but have since had an ad-hoc temporary payment entered on their record
- Historic leavers should be deleted in accordance with statutory and/or pension rules and GDPR

GDPR routines

We recommend periodically running the GDPR routines within HCM Cloud to remove leavers where the last paid date is over seven years.

Suggestion:

- Configure and run the HCM Cloud GDPR routine periodically to remain compliant
- Standard reports are available to help with identifying personal data
- The GDPR functionality can be configured to exclude certain retention reasons, and the number of years data is held for individuals
- The task can also be run on an individual, via saved list or in bulk

Bulk Data Deletion

This process will remove the selected individuals from the ResourceLink System and Database.
** Deleted Data cannot be recovered **
☐ Check this box to acknowledge the above warnings

Selection

List Object

List Name

Number of Individuals

Deleted Today 0

Daily Deletion Limit 10000

Only records within the remaining limit will be deleted

Level - Employee

Employee Name MISS A Smith

Employee Number BH1

Retention Parameters

Restrict Deletion

Number of Years

Retention Reason

Exclude Employee

Exclude Employee from Deletion

Exclude Employee Reason

Deleting non-starters

We recommend removing any employees who have not been processed or reported on statutory returns.

Suggestion:

- Remove non-starters or employee records where they have not been processed and reported on statutory returns using task **HREMPDEL** (Employee Archive/Delete)
- Examples scenarios:
 - Non-starters
 - Records created in error
 - Duplicate records
 - Dummy records

Object: EMPLOYEE - Employee

Selection

Process Type

Delete Object ☒ Archive Object ☐

Archive File

Delete Date 30/10/2023

Seq	Related Objects	Del / Arch	Object Area	Details
00001	EMPLOYEE	<input type="text" value="Y"/>	<input type="radio"/>	

Knowledgebase Articles



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Knowledgebase articles

Further information on good practice guidelines, recommendations and 'how to' guides are available on the below knowledgebase article in the Zellis Customer Help Centre.

HCM Cloud Housekeeping: Recommendations for general housekeeping (KB0018315)

KB0018315 - Latest Version ▾

Subscribe

Actions ▾

ResourceLink housekeeping | Recommendations for general housekeeping

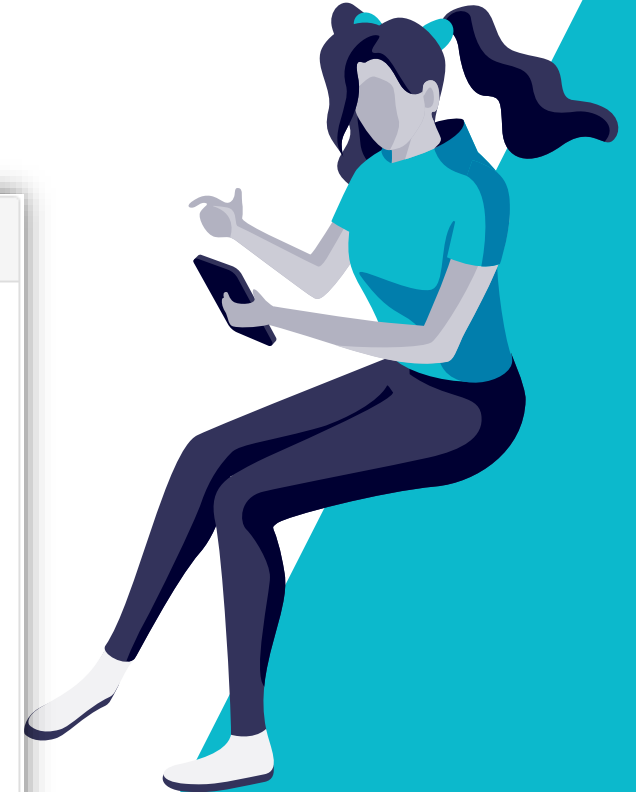
• 📅 6d ago • 👁 470 Views

ResourceLink is a functionality-rich application that can automate your business and statutory calculations to reduce manual activity and enable compliance.

Periodic housekeeping makes sure that ResourceLink runs at its best.

We can complete a **system health check** for you to assess the health of your current instance, looking particularly at housekeeping and core functionality.

This article includes links to articles containing guidance for performing housekeeping in various areas of ResourceLink as well as our data retention period recommendations.



System Health Check

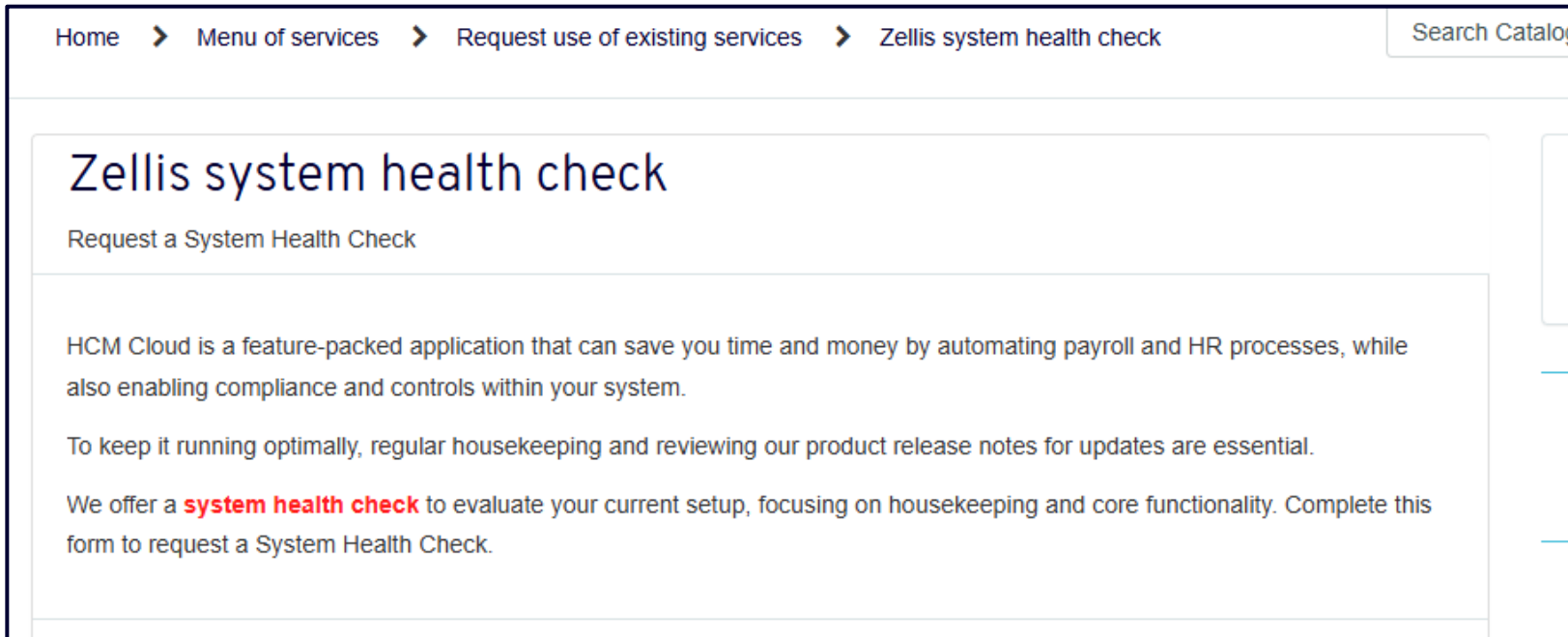


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System health check

At Zellis, we can offer you a system health check to assist you with optimising your core functionality, streamline your housekeeping, and provide expert advice and guidance. Ready to elevate your system efficiency?

If so, you can request a system health check by contacting your Account Manager or as of Friday this week (07/02/2025), you'll be able to request this via the Customer Help Centre.



The screenshot shows a web interface for requesting a system health check. At the top, a breadcrumb trail reads: Home > Menu of services > Request use of existing services > Zellis system health check. To the right of the breadcrumbs is a search bar labeled "Search Catalog". Below the breadcrumbs, the main heading is "Zellis system health check", followed by the subheading "Request a System Health Check". The main content area contains three paragraphs: "HCM Cloud is a feature-packed application that can save you time and money by automating payroll and HR processes, while also enabling compliance and controls within your system.", "To keep it running optimally, regular housekeeping and reviewing our product release notes for updates are essential.", and "We offer a **system health check** to evaluate your current setup, focusing on housekeeping and core functionality. Complete this form to request a System Health Check."

Questions