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22-23 November • The ICC Birmingham

Rebecca Mullins

Director of HCM Solutions
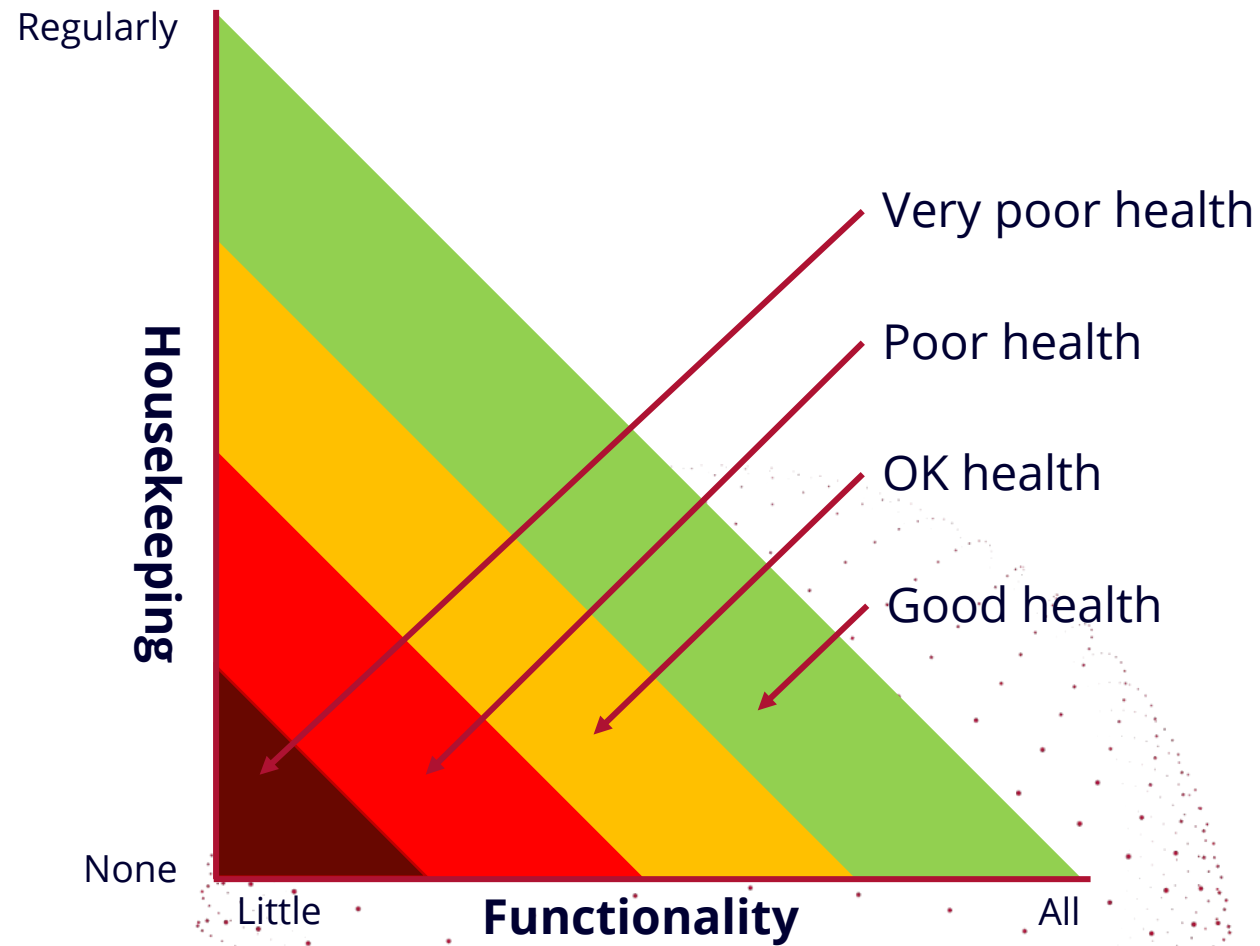
Emma Archer

Head of Pre-Sales

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Agenda

1. Is ResourceLink working for me?

2. Housekeeping

3. Functionality

4. What are the benefits of doing all of this?

5. How can we support you

6. Q&A

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Is ResourceLink working for me?

**How well ResourceLink is working for you is dependant on the health of your system:**

Housekeeping

Housekeeping

Large volumes of data can build up across many different areas of the system each time you enter data and process a payroll.

A good housekeeping routine will have a direct impact on the optimisation of your ResourceLink instance.

Yet, it is the most overlooked task within the system.

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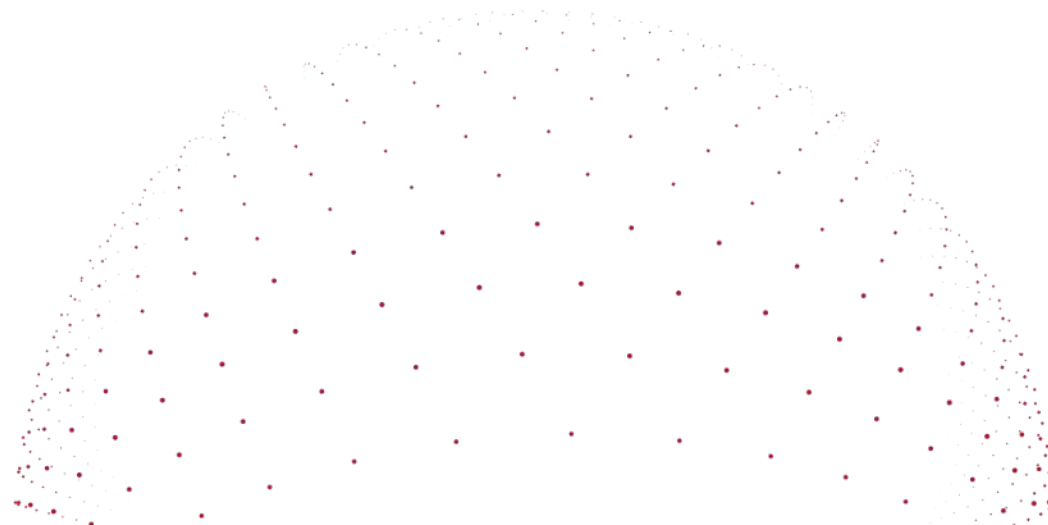
Housekeeping – CSV input and output files

Many customers make use of the ability to import data using CSV files rather than manually entering the data. However this can mean there are a lot of historical files sitting within the system, taking up space.

Suggestion:

➢ Historic files can be deleted en masse using task **"HR98S95"**

N.B. We can also set up automation to automatically delete files based on rolling periods.

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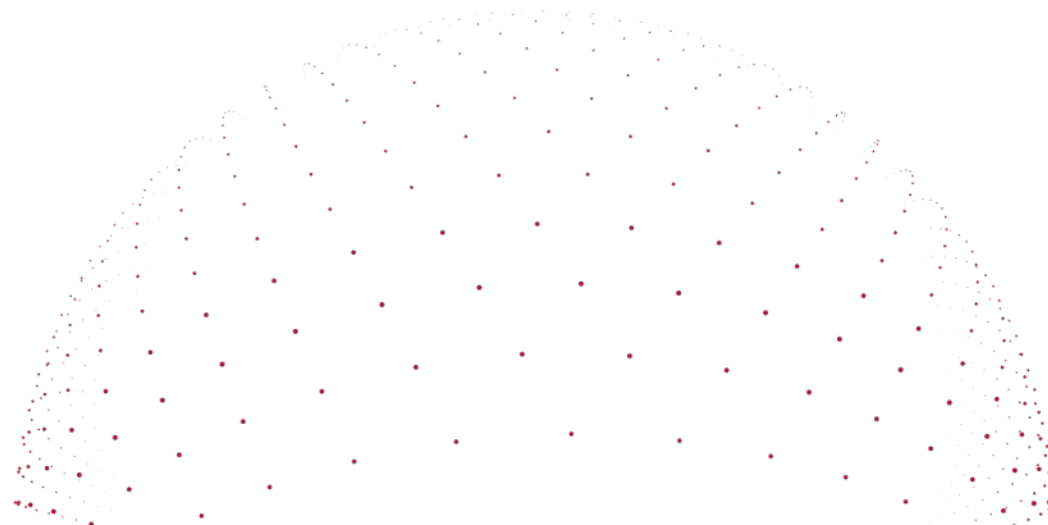
Housekeeping – MyView forms

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"** enables you to select the employee first before accessing the Deletion of MyView Forms screen **"MD290S55"**

 ➢ Task **"HR290S55"** access the Deletion of MyView Forms screen **"MD290S55"**, to delete all forms

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

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Housekeeping – audit cleardown

ResourceLink has powerful capability to capture activity against employees and system related changes. However audit data can quickly build up and slow down the core processing significantly.

Suggestions:

➢ Run the task to show which tasks are being audited and their current sizes

➢ Review the configuration of your audit; are you auditing unnecessary fields, if so turn these off

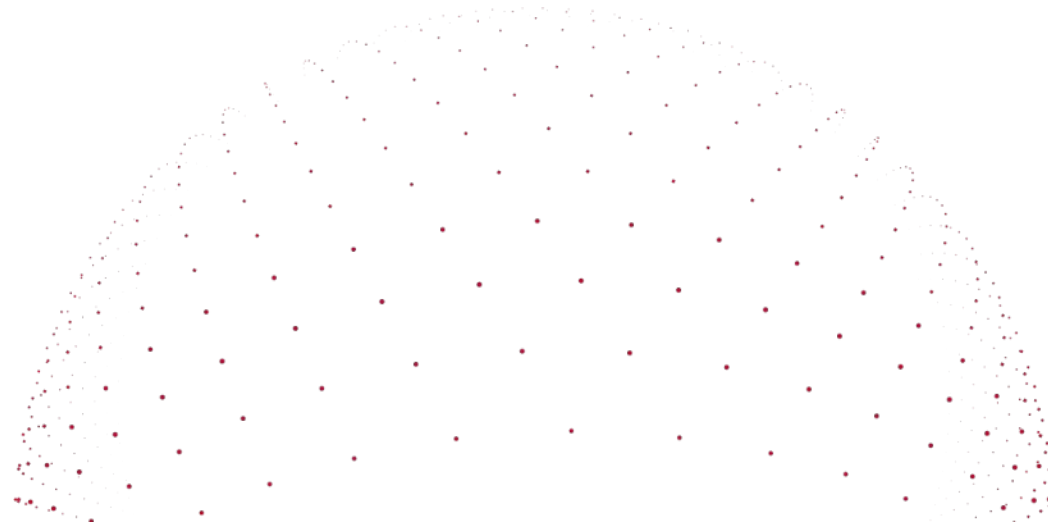➢ Delete unwanted/historical audit data on a regular basis

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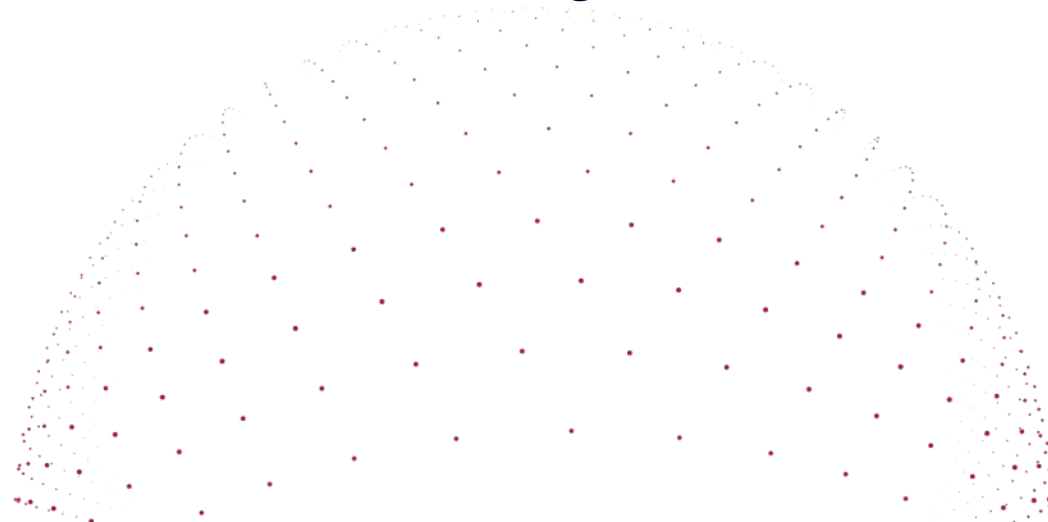
Housekeeping – delete payslip history

There is a statutory obligation to keep payslip history for HMRC or Revenue Commissioners audit purposes, both currently six tax years plus current.

Suggestion:

➢ Once this period has past delete the data using task **"HR120S10"**

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Housekeeping – costing cleardown

Costing tables within ResourceLink can become huge, 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"**

N.B. If the data is erroneously deleted it can be recreated using standard ResourceLink functionality.

Housekeeping – leaver payroll

If leavers are left within the main control group, they are included in the calculation run.

**A leaver payroll is a control group with all ex-employees within it.**

Suggestion:

- ➢ Move historic leavers into a separate control group

- ➢ However, only move the leavers at the end of the tax year, after all returns have been completed

- ➢ And only move them if they are not going to be receiving payments after leaving e.g. share vesting

- ➢ Historic leavers should be deleted in accordance with statutory and/or pension rules and GDPR

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Housekeeping – other data to cleardown

Suggestions:

➢ Applicant data - **"HRAPPDEL"**

➢ Vacancy data - **"HR256S27"**

➢ HR Interfaces – can be scheduled to delete the files. N.B. This deleted the data from the data from the holding tables and not from within the relevant module

➢ Pay calculate exception messages – task can be undertaken by DBAs

➢ GDPR – highly restricted tasks in accordance with GDPR legislation and retention periods
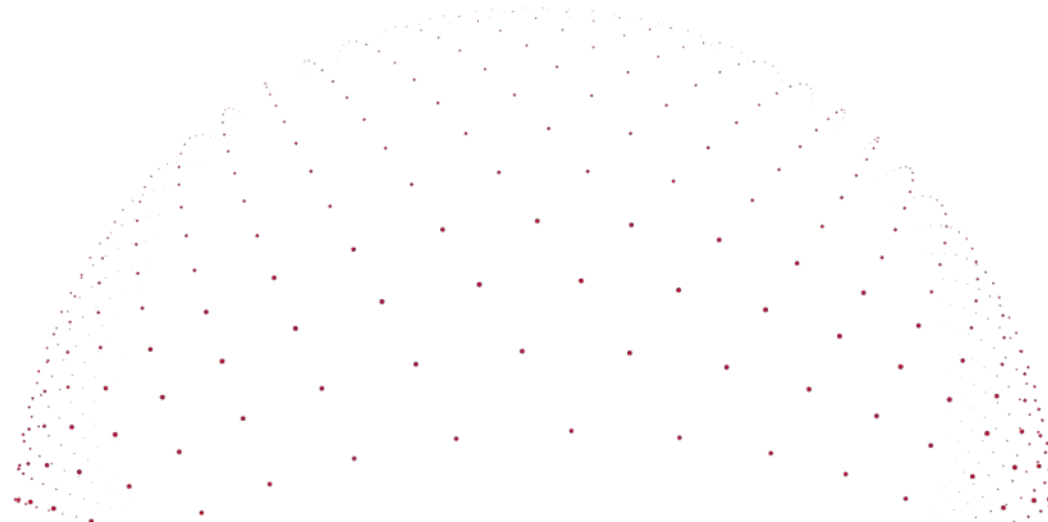
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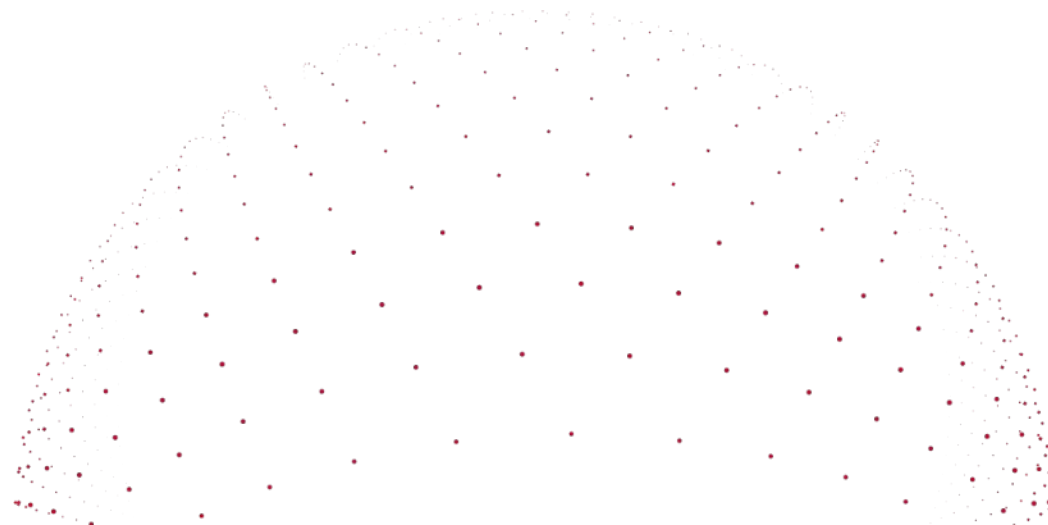
Functionality

Functionality

ResourceLink is a hugely functionality rich application which can do the heavy lifting for you, enabling you to do more value adding activities.

Through:

➢ Core functionality

➢ Automation

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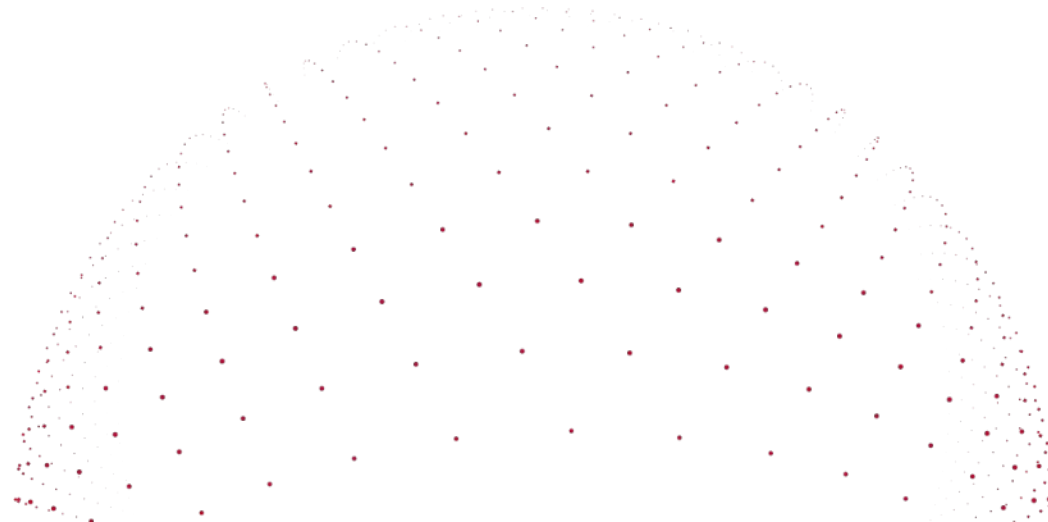
Core functionality

Within the core functionality you can process all of the statutory requirements, enabling compliance and removing manual check, for example:

➢ NMW

➢ AHP

➢ GPG

➢ Statutory absences

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Core functionality – NMW monitoring

ResourceLink NMW functionality gives confidence and provides insights into national minimum wage (NMW) and national living wage (NLW) calculations:

➢ Receive payroll calculation messages notifying you if any employees fall below NMW or NLW

➢ Flip a salary sacrifice contribution into a net deduction if it takes the employee below NMW

➢ Identify the calculation to be used, i.e. salary, salary term time only or time

➢ View a breakdown of how ResourceLink calculated the NMW/NLW check

➢ Control the 'weeks in year' to be used in calculations

➢ Define the pay element categories to be included/excluded in the check

➢ Monitor whether a salary worker has worked more than their basic hours during an identified annual period

➢ Review history tables of past checks available in ResourceLink Reporting Services (RRS)

➢ See how much more it would cost to pay the real living wage within RRS

Core functionality – average holiday pay

ResourceLink functionality makes it easier to achieve compliance by providing a more transparent and accurate calculation routine for the average holiday pay:

➤ Within ResourceLink select average pay to be calculated over 12 periods, or over 12 payslips (monthly paid) or up to 52 payslips (if weekly paid)

➤ Only exclude weeks from the average hourly pay calculation when absence (sick leave, parental leave, holiday, etc.) is present for the whole working week (based on the employees work pattern)

➤ Give the option to include fixed pay element values in the average hourly pay calculation

➤ Display an absence breakdown for all the weeks and payments included in the average hourly pay calculation to provide better visibility of the calculation and the ability to check that the correct weeks and absence payments have been included

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Core functionality – gender pay gap

Within ResourceLink you can automate the calculation and running of your GPG reports, across the core data items:

- ➢ Mean and median gender pay gap

- ➢ Mean and median bonus gap

- ➢ Bonus proportions

- ➢ Quartile pay bands

Once you have the data Zellis can also support you with consultancy to provide insights into your data and practical remediations to close the gaps.

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Core functionality – statutory absences

Leave Management within ResourceLink enables the processing of all statutory absences:

➢ Sickness

➢ Maternity, paternity, adoption

➢ Shared parental

➢ Parental bereavement

Any occupational schemes can also be configured to run in conjunction with the statutory rules and payments e.g. top up to full pay during paternity leave.

Any other types of absences can be configured based on your company policy e.g. jury service.

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Automation

Automation can enable a significant reduction in the need for manual input and processing within ResourceLink.

Examples include:

- ➢ Pay elements and deductions

- ➢ Interfaces

- ➢ Offline processing and scheduling

- ➢ Multi stream processing

- ➢ Locking

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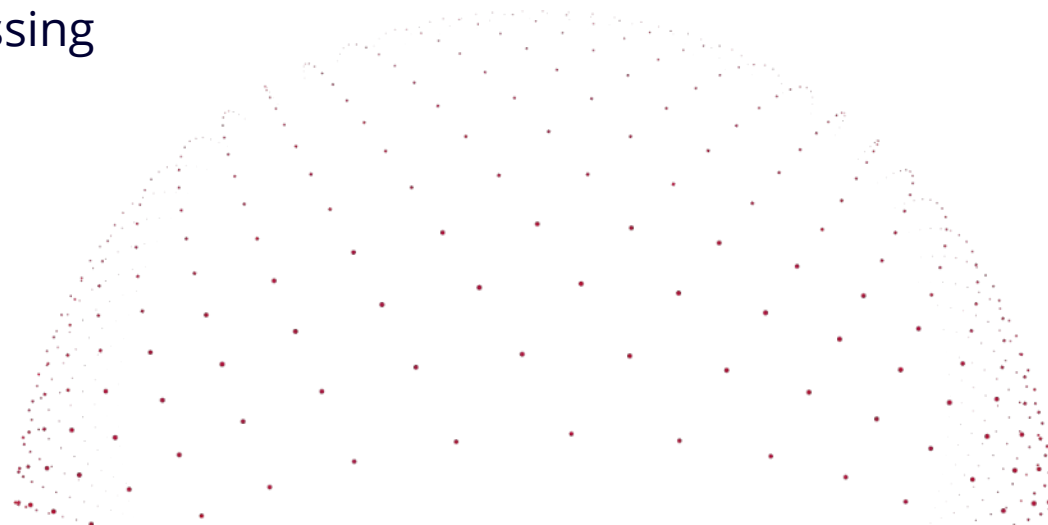
Automation – pay elements and deductions

Automated calculations can save significant manual effort and under/over payments from incorrect calculations. ResourceLink has rich functionality to automate calculations, including:

➢ Alabaster

➢ Backpay

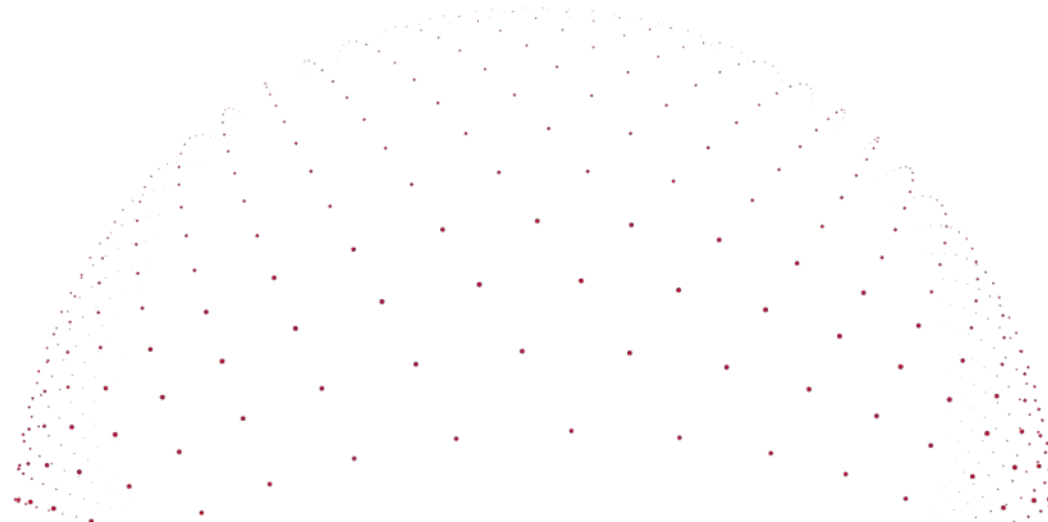➢ Salary sacrifice

➢ Pro-rated payments

Suggestion:

➢ Review all of the manual calculations undertaken

➢ Document the calculation, including any T&Cs and policies

➢ Build the calculations within ResourceLink

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Automation – interfaces

ResourceLink has the ability to interfaces with 3rd party systems, through:

➢ Flat files

➢ Connectors

The interfaces can be processed offline and scheduled.

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Automation – offline processing and scheduling

There are over 140 tasks that can be scheduled to run offline in the background, alternatively the user can execute a process, logout and return to the results later. These include e.g.:

- Recruitment Import – task **"HR380U21"**

- Bulk Absence Update – task **"HR195S21"**

- Generate NMW Notification – task **"HR305U05"**

These can be scheduled to run at a time that is convenient e.g.:

- Nightly: Schedule MultiStream Calc – task **"HR01U52S"**

- Monthly: Offline Costing (Current) – task **"HRCOSTOFFC"**

- Quarterly: Housekeeping – task **"HR709U24S"**

N.B. There are some tasks which cannot be scheduled.

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Automation – multi stream processing

Multi stream processes splits large processes into smaller batches and runs them concurrently.

The most heavily used ones are:

- ➤ Multi-Stream Calc (MD01U52/MD01S50/MD01U00N with auto-offline enabled)

- ➤ Multi-Stream Terminate (MD69U2/MD69S7/MD69U1 with auto-offline enabled)

- ➤ Multi-Stream Remove (MD83U9/MD83S7/MD83U1N with auto-offline enabled)

- ➤ Multi-Stream Costing (MD45U45/MD22S63/MD22S31 with auto-offline enabled)

N.B. this is only for hosted customers (SaaS), HCM customers and Managed Service customers.

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Automation – locking

If a user is in a record and a pay calculate is run then ResourceLink will sit and wait until the record is freed........this can have a significant impact on the process within a business.

Some business have a blackout period to stop this happening but means other users within the business cannot do any data input!

By configuring the relevant system parameters within system control, "MISC Parameters – LOCKS", enable ResourceLink to skip any locked records.

The locked exception task "HR557S38" can be used at the end of the process to check for any locked records, so they can be run manually when freed.
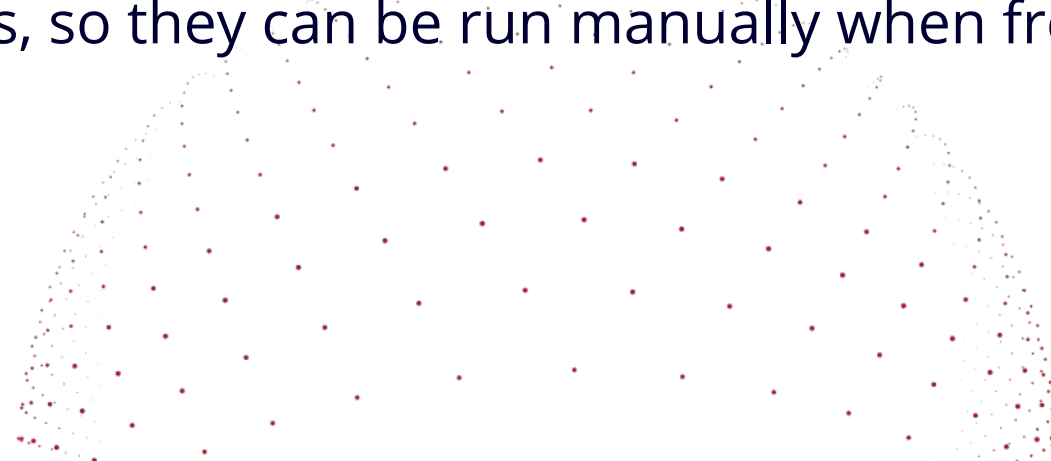
What are the benefits of doing this

Optimising ResourceLink will allow your teams to move away from being a transactional function within the business and enabling them to become a value adding function of the business.

These can include:

➢ Undertaking continuous improvement

➢ Implementing new functionality within existing systems

➢ Reviewing benefit programs and identifying tax efficient schemes

➢ Supporting acquisitions and divestments

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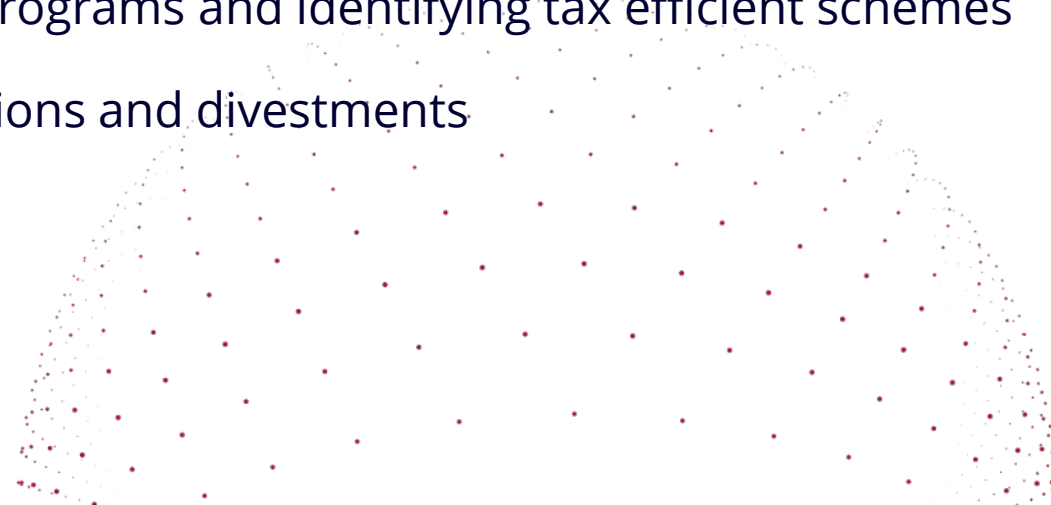
How can we support you

Zellis have a variety of ways to support you making ResourceLink work harder:

These can include:

➢ System reviews

➢ Application Consultant support

➢ Training

➢ Flexi Consulting

➢ Application Managements Service

For further details on the above please either visit the Zellis Management Consulting or Pre-Sales booths in Hall 8 during the breaks or email me rebecca.mullins@zellis.com

Q&A