

# Signify Payroll Connector for Sage

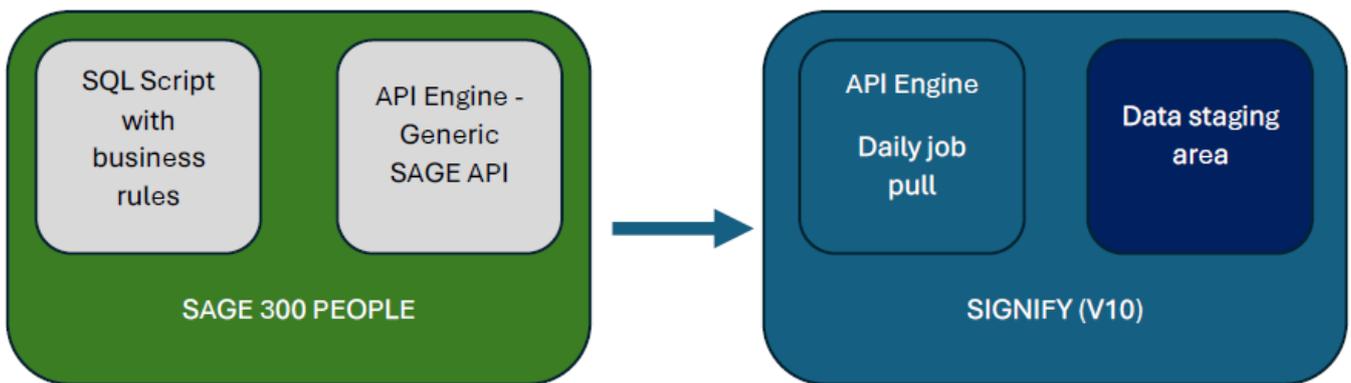
This document describes the integration process between Signify (V10) and SAGE 300 People with a specific focus on the API integration.

## General business rules:

1. In this case, SAGE is the source of the basic employee information.
2. The integration job will be executed on the Signify V10 system and is usually scheduled to run during the night.
3. Signify calls the SAGE APIs to obtain a bulk dataset with multiple fields and all employee records.
4. If the expected record count of the dataset is expected to exceed 5,000, please liaise with a technical Signify consultant.
5. Some of the fields in the dataset may be empty due to the fields not being populated in SAGE:
  - a. In such cases:
    - i. These fields can be maintained on the Signify system
    - ii. Left blank, as the client may not require it
  - b. If preferred, the client may choose to purchase additional modules in SAGE to maintain such fields in SAGE. It is, however, not a requirement as such fields can be maintained in Signify.
  - c. Example: If OFO codes are required, the Skills module in SAGE is required, alternatively, these values can be maintained on the job profile in Signify.

## Process business rules:

The integration process architecture is depicted in the image below:



1. The integration process that is executed by the Signify system calls an API on the SAGE server to retrieve a dataset with all the employee records from SAGE.
2. This dataset includes active employee records, as well as employee records for employees who were terminated during the previous [TBD] months.
3. Optional: An option to provide a parameter to only return records that were changed in the last [X] days will help to limit the size of data to be pulled during the API request. This option must, however, allow for all records to be pulled.
4. This dataset is stored in a staging table in the Signify system, from which the data transformation is done:
  1. Employee number is used as the unique identifier and is used in the [EmployeeCode] and [Username] fields in Signify, where [Username] must be unique.
  2. If an employee number does not exist in Signify (in the [Username] field), a new record is created in Signify.
  3. If an employee number exists, the existing record is updated in Signify.
  4. If Job and Position codes are available from SAGE:
    1. If a job code and position code do not exist in Signify, a new job profile and linked position title are created in Signify.
  5. If Job and Position codes are NOT available from SAGE:
    1. If a job title and position title do not exist in Signify, a new job profile and linked position title are created in Signify.
    2. This may cause unused job profiles to remain in Signify and may have to be cleaned up manually.
  6. If Organisation unit codes are available in SAGE:
    1. If an organisation unit does not exist in Signify, a new organisation unit is created in Signify.
  7. The above means that all new appointments, terminations, and movements are made.
5. For additional information regarding the SAGE 300 People APIs:

<http://documenter.getpostman.com/view/7078460/UVRBn6LC#db6e0efe-8d5d-4e1b-b0e7-c6de98410295>

## Who to involve:

1. A Signify technical consultant will ensure that the above process is implemented from a Signify point of view.
2. A SAGE technical consultant (usually a SAGE channel partner) must configure the API on the SAGE hosting environment.
3. SAGE clients can choose if the way to use their channel partners to configure the necessary API process.

4. **Alternatively, Signify can connect the client or their channel partner with a SAGE technical consultant that Signify has partnered with on previous projects, and who can implement the process within a time effort of between 2 and 6 hours.**

5. The consultant will deploy a custom SQL script on the SAGE database.

6. **An SSL certificate must be purchased by the client and configured by the SAGE consultant.**

7. The SQL script is executed when the Generic SAGE API is called.

8. The API is:

```
http://{{HostName}}:{{APIPort}}/api/apibase/GenericGet/{{GenGetCodeAsSetupInPeople}}
```

9. Below is the list of fields that are required and recommended. Fields with no comments are optional. To ensure complete information, even fields with no comment should be added if available in SAGE:

Field Name	Field Type	Description	Required/Optional/ESS Configured	Required / Recommended / Notes (If blank, optional)
externalId	Int	External Payroll Identity Id	Optional	Recommended: SAGE's unique UserID for the employee
username	string	Username to allow the user to login	Required	Required - Usually the employee number
employeeCode	string	When empty it is set equal to username	ESS Configured	Required. Usually the employee number. If not provided, the username will be used.
name	string	Name of the user	ESS Configured	Recommended
surname	string	Surname of the user	ESS Configured	Recommended

emailAddress	string	Email for most notifications in the system e.g. Password reset	ESS Configured	Recommended as it can be used for communication and password resets
alternateEmailAddresses	string	Email for reporting	ESS Configured	
idNumber	string	Id Number of the user	ESS Configured	Recommended, but can be blank if required by the client
passportNumber	string	The passport number of the user	ESS Configured	Recommended, but can be blank if needed by the client
mobileNumber	string	Mobile number, preferably with country code	ESS Configured	Recommended as it can be used for communication and password resets
workNumber	string	Work number, preferably with country code	ESS Configured	
homeNumber	string	Home number preferably with country code	ESS Configured	
middleName	string	The middle name of the user	ESS Configured	
initials	string	Initials of the user	ESS Configured	Recommended
title	string	Title of user	ESS Configured	Recommended
knownAs	string	The user is known as	ESS Configured	Recommended
homeLanguage	string		ESS Configured	
gender	string		ESS Configured	
race	string		ESS Configured	

citizenship	string		ESS Configured	
maritalStatus	string		ESS Configured	
birthDay	string	Date of birth of the user	ESS Configured	
disability	string	A single disability for the user	ESS Configured	
residentialUnitNumber	string		Optional	
residentialComplexName	string		Optional	
residentialStreetNumber	string		Optional	
residentialStreetName	string		Optional	
residentialSuburbDistrict	string		Optional	
residentialCityTown	string		Optional	
residentialCountry	string		Required when any residential field is supplied	
residentialProvince	string		Required when any residential field is supplied	
residentialPostalCode	string		Optional	
residentialAsPostal	string		Optional	
postalUnitNumber	string		Optional	
postalComplexName	string		Optional	
postalStreetNumber	string		Optional	
postalStreetName	string		Optional	
postalSuburbDistrict	string		Optional	

postalCityTown	string		Optional	
postalCountry	string		Required when any postal field is supplied	
postalProvince	string		Required when any postal field is supplied	
postalCode	string		Optional	
jobExternalId	int	The payroll job ID	Optional	
jobTitle	string	Name of the job	Optional	
jobCode	string	Code of the job	Optional	
occupationalCategory	string	Occupation Category of the job	Optional	
occupationalLevel	string	Occupational Level of the job within the category	Optional	
jobOfoCode	string	OFO code of the job	Optional	
jobGrade	string	Grade of the job	Optional	
gradingType	string	Grading used for the job	Optional	
positionExternalId	int	The payroll position Id	Optional	
positionTitle	string	Position Name	Optional	
positionCode	string	Position Code	Optional	
appointmentType	string	How the user is appointed in the position	Optional	
startDate	string	Start date in the position	Optional	
endDate	string	End date in the position, when empty, the user is not terminated	Optional	

reasonForTermination	string	The reason the user's employment has ended	Optional	
startDateInGroup	string	The start date in the group	Optional	
startDateInCompany	string	The start date in the company within the group	Optional	
orgLevel1_externalId	Int	Org unit Id on payroll	Optional	Recommended if available in SAGE
orgLevel1_name	string		Required	Required - can be hardcoded if not available in the source system
orgLevel1_code	string	Unique code per ruleset for the org unit	Optional	Required
orgLevel1_workLocationName	string		Optional	Recommended if the client has this level in the org
orgLevel2_externalId	Int	Org unit Id on payroll	Optional	Recommended if the client has this level in the org
orgLevel2_name	string		Optional	Recommended if the client has this level in the org
orgLevel2_code	string	Unique code per ruleset for the org unit	Optional	Recommended if the client has this level in the org
orgLevel2_workLocationName	string		Optional	
orgLevel3_externalId	Int	Org unit Id on payroll	Optional	Recommended if the client has this level in the org
orgLevel3_name	string		Optional	Recommended if the client has this level in org
orgLevel3_code	string	Unique code per ruleset for org unit	Optional	Recommended if the client has this level in org
orgLevel3_workLocationName	string		Optional	

orgLevel4_externalId	Int	Org unit Id on payroll	Optional	
orgLevel4_name	string		Optional	Recommended if client has this level in org
orgLevel4_code	string	Unique code per ruleset for org unit	Optional	Recommended if client has this level in org
orgLevel4_workLocationName	string		Optional	
orgLevel5_externalId	Int	Org unit Id on payroll	Optional	
orgLevel5_name	string		Optional	Recommended if the client has this level in the org
orgLevel5_code	string	Unique code per ruleset for org unit	Optional	Recommended if the client has this level in the org
orgLevel5_workLocationName	string		Optional	
orgLevel6_externalId	Int	Org unit Id on payroll	Optional	Recommended if the client has this level in the org
orgLevel6_name	string		Optional	Recommended if client has this level in org
orgLevel6_code	string	Unique code per ruleset for the org unit	Optional	Recommended if client has this level in org
orgLevel6_workLocationName	string		Optional	
orgLevel7_externalId	Int	Org unit Id on payroll	Optional	Recommended if the client has this level in the org
orgLevel7_name	string		Optional	Recommended if the client has this level in the org
orgLevel7_code	string	Unique code per ruleset for the org unit	Optional	Recommended if the client has this level in the org
orgLevel7_workLocationName	string		Optional	

orgLevel8_externalId	Int	Org unit ID on payroll	Optional	Recommended if the client has this level in the org
orgLevel8_name	string		Optional	Recommended if the client has this level in the org
orgLevel8_code	string	Unique code per ruleset for the org unit	Optional	Recommended if the client has this level in the org
orgLevel8_workLocationName	string		Optional	
orgLevel9_externalId	Int	Org unit ID on payroll	Optional	Recommended if the client has this level in the org
orgLevel9_name	string		Optional	Recommended if the client has this level in the org
orgLevel9_code	string	Unique code per ruleset for the org unit	Optional	Recommended if the client has this level in the org
orgLevel9_workLocationName	string		Optional	
lineManagerUsername	string	The username of the manager, existing in the system or part of the API body	Optional	
performanceManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
departmentManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
trainingManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
pdpFirstApproverUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
pdpSecondApproverUsername	string	The username of the manager, existing in the system or part of the data received	Optional	

leaveManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
salaryReviewManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
talentManagementManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
secondaryReportingManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
lineManagerOnceRemovedUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
workflowOriginatorUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
financeManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
financeOfficerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
hrOfficerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
hrRecruitmentOfficerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
businessUnitHrManagerUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
secondaryJobRequisitionApproverUsername	string	The username of the manager, existing in the system or part of the data received	Optional	

leaveManagerAlternateApproverUsername	string	The username of the manager, existing in the system or part of the data received	Optional	
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