# Sage 300 2024

## Sage HR Integration Guide

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# Contents

# Install Sage HR

Download the Sage HR Integration installer: HQ80A.exe.

To install:

1. Open the HQ80A.exe

   > **Note:** If the required product updates are not installed, an error will appear and the installation process will abort.

2. If no error appears, click **Next.**
3. Accept the terms and conditions.
4. Click **Next**.
5. Click **Install** to begin installation process
6. Once the installation process is successfully completed, click **Finish.**

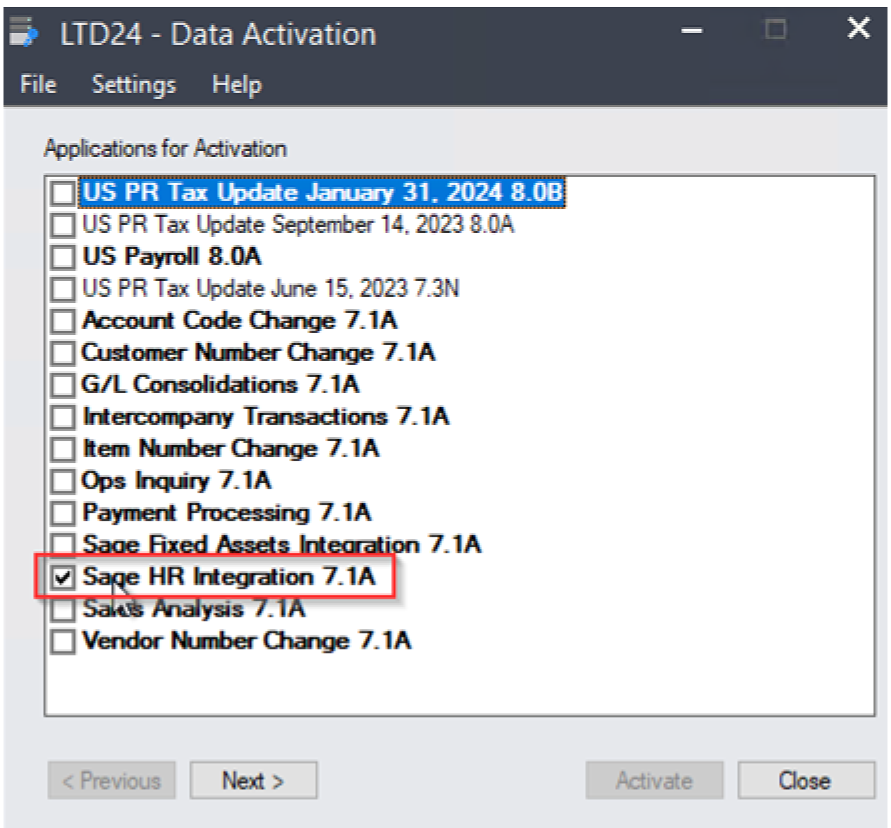
# Setup Sage HR

Before you can set up Sage HR, you will need to activate it first.

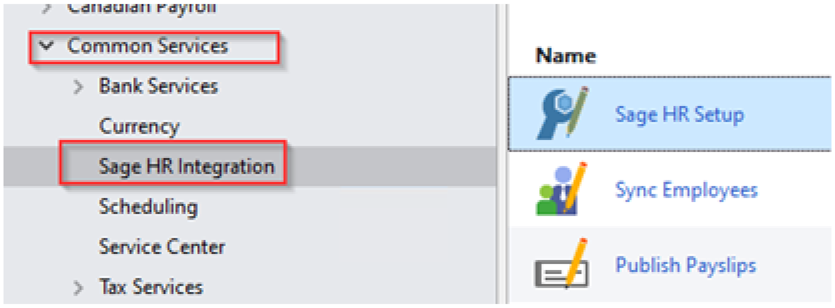
This will be a once-off process.

**Tip:** To avoid issues during setup, ensure Microsoft Edge WebView2 Runtime is installed in the Windows Control Panel. For more information, see Knowledgebase article: 240514212153870.

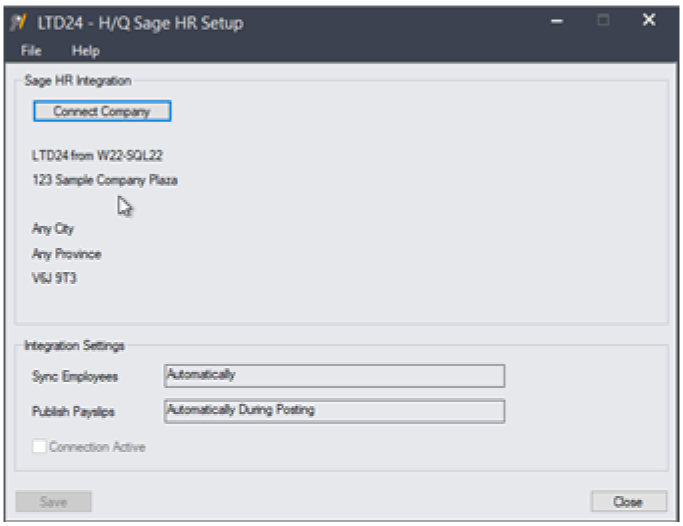
1. Go to **Administrative Services** > **Data Activation**.




After successful activation, Sage HR will be visible in **Common Services.**




2. Launch the **Sage HR** screen.




3. Then, select **Connect Company** and a welcome message will appear.

> **Note:** To successfully connect your company, you will need to fill these boxes, found in Common Services > Company Profile Screen : **Company Name**, **Tax Number**, **Business Registration Number** and **Country Name**.

4. Click **Get started** below the welcome message to start the setup.
5. Enter the email address and password in the authentication page.
6. Click Login and wait for the confirmation page to pop-up.
7. Open a browser, enter https://sage.hr/signin. Sign in with the same email address and password used in step 5.
8. Confirm the existence of the new Sage HR company. Sign-out from Sage HR.

> **Important!** Before you proceed, make a backup copy of the connection.dat file found in this folder: <shared data folder>\company\SageHRIntegration.

**Tip:** Include the SageHR Integration folder in your daily backup.

## To disconnect from Sage HR:

1. From the File menu, select Sage HR.
2. Select Disconnect from Sage HR.
3. From the Sage HR screen, deselect the Connection Active box.

# Workstation Setup

For Sage 300 with workstation setup deployment, you need to run WSSETUP.CMD in order to use the Sage HR.

> **Tip:** To avoid issues before you run Sage HR integration on the workstation, ensure Payroll 8.0 is with at least tax update "C" is installed on the server.

To begin workstation setup:

1. (If applicable) uninstall the existing workstation setup.
2. Install the workstation setup (wssetup.exe) that comes with the product update.
3. Run the wssetup.cmd

To access the WSSETUP.CMD file:

1. Go to **Workstation > HQ80A file** on the server.

   > **Example:** If Sage 300 is located in "\\<servername>\Sage300 ", the HQ80A folder will be inside the Sage300 folder.

2. From HQ80A, open the WSSETUP folder.
3. Double click on WSSETUP.CMD to begin registration process.

- A window appears while the process is running and closes when it ends.

> **Note:** The Windows user on the workstation must have appropriate rights on the computer to register the application components.

# Manage User Permissions for Integration

Sage 300 users can either sync an employee record with Sage HR, upload payslips to Sage HR, or both.

## To give a user Sage HR rights:

1. While logged in as the Sage 300 Administrator, create a Security Group for Sage HR Integration. The group will be used when assigning authorizations to Sage 300 users. Please refer to the help topic about adding security groups for more information.
2. After security groups are created, you can assign Sage 300 users to a security group. This is done from the User Authorization screen. Please refer to the help topic about User Authorization for more information.

### More user security requirements:

In addition to granting user rights for Sage HR Integration, a Sage 300 user must also be granted rights to the payroll system and rights to access employee records. By default, a non-admin user does not have access to any payroll employees. The Sage 300 ADMIN must grant permission to the user to access all employees or a group of employees. This is done from the payroll system’s User Security setup.

Please refer to the help topics about Canadian Payroll or US Payroll User Security setup for more information .

# Sync Employee Settings

In the **Sync Employees** window you will find two tabs:

1. Employees NOT synced with Sage HR - shows all active employees in Payroll; their email addresses; personal details and sync status.

> **Important!** Email addresses are mandatory for syncing employees with Sage HR. You will see an error message if the email column is blank or incorrect.

> **Note:** In rare cases where a Sage 300 company has both US Payroll (UP) and Canadian Payroll (CP) active, the screen will display all active employees from both Payroll versions. In this case there will an Application column that will indicate which application the employee record came from.

2. Employees Synced with Sage HR- shows employees that have been synced or those selected for syncing with Sage HR.

## To sync employee information

1. Go to the **Employees NOT synced with Sage HR** page.-

- In this page you will find a list of all active and terminated employees
- To include inactive and terminated employees in the list select the appropriate check box.

2. Select the employee you want to sync.

- When you double click the row of the employee you wish to sync, a **Yes** or **No** toggle will appear.
- Turn it to **Yes**, to select the employee for syncing with Sage HR.

> **Note:** You can also invite selected employees to register for access to their information and payslips. You can do this by double clicking the Send Invite column and turning the toggle button to Yes

3. To begin syncing to Sage HR, click the **Add Selected Employees to Sync List** button.

This process will move all the selected employees to the “Employees Synced with Sage HR” page, and start the syncing process in the background.

4. Once you have made changes in the list synced employees, click **Download Employee changes from Sage HR**

This process will trigger the downloading of information from Sage HR.

## To turn off syncing

1. Go to the **Employees Synced with Sage HR** page.
2. Select the employees you want to remove.
3. Click the **Remove Selected Employees** from the sync list.
4. A pop-up window appears, asking to either **Keep Employee Data in Sage HR** or **Purge Employee data from Sage HR.**

**Important!** Any information entered in an employee's record in Sage HR that also exists in Sage 300 will overwrite the information in Sage 300 during a sync.

# Integration Settings for Payslips

On the HR Integration Settings window, during setup, you can choose how and when you want to upload payslips.

You have the following options:

- Uploading payslips automatically during posting.
- Uploading payslips automatically for availability on the pay check date.
- Uploading payslips manually (on demand).

## To modify integration settings

1. Open Sage HR Setup.
2. Go to **Integration Settings.**
3. Select a different integration setting in the drop down menu.
4. Click **Save.**

# Integration Settings for Syncing Employees

During setup, you can go to HR Integration Settings, to choose how and when you want to download employee information from Sage HR.

You have the following options:

1. Downloading new information from Sage **HR Automatically.**
2. Downloading new information from Sage **HR Manually (on demand).**

## To modify integration settings

1. On the Home window, choose Sage HR from the File menu.
2. Go to Integration Settings, and select your preferred option.

# Upload Payslips to Sage HR

After you have processed payroll, you can upload payslips to Sage HR.

Before you can perform this task:

- The company needs to be connected to Sage HR.
- You need to have sufficient rights to upload payslips to Sage HR.
- All relevant employees must be synced to Sage HR

> **Tip:** If you have chosen one of the automatic options for your integration settings, Sage 300does the uploading for you.

## To upload payslips to Sage HR

1. Process a pay run in the payroll system.
2. Print payroll checks.
3. Confirm if checks were printed successfully.
4. The payroll system will proceed to post the checks and create payslips for every employee.
5. If you have chosen one of the automatic options for publishing payslips, the payroll system will upload the payslips to Sage HR
6. If you have chosen to upload the payslips manually, open the Publish Payslips screen in Sage HR Integration.

   Before you publish payslips note that:

   - If HR Setup is on Automatically Publish During Posting or Automatically on Check Date, the status of the payslips will initially be “Publishing”, and change to “Published” once Sage HR receives the data and PDF files.
   - If HR is on Manually (On Demand), the status of the payslips will be "Not Published". In this screen, the user can select to Publish either immediately or on check date.
7. Click **Publish Selected Payslips** on the screen that contains the list of all payslips generated for synced employees.

**Note:** By default, only payslips for Publishing are shown. Check the Show Published Payslips box to view all (not published, published and publishing) payslips.

# Terminate Employees

To terminate employees

1. Go to **Company** within Sage HR
2. Click on the employee you want to terminate.
3. Scroll down to the bottom and click **Terminate**.
4. A dialogue box will appear, where you can enter the employee's last working day and reason for termination.
5. Log in to Sage 300 as user with permissions to Sage HR Integration.
6. Open the **Sync Employees** screen.
7. Click **Download Employee Changes from the Sage HR**. This will download all updates from Sage HR including the terminated employees.

**Note:** The terminated employee will only be removed from Sage HR, but will remain in payroll, until the termination process is compete. Only authorized payroll personnel can remove them from payroll.

# Create Employees from Sage HR

1. Log in to Sage HR with an administrator account.
2. Go to the **Sage HR screen > Create Ne Screen.**
3. To create a new employee in Sage HR, select employee to be included in Sage Payroll.

- Create a new employee in Sage HR.
- Choose the employee to be included in Sage Payroll by selecting **Yes** in the dialogue box, at the bottom of the Employee section.

4. Enter some details in the personal details' section and click **Save**.

> **Note:** Sage 300 payroll only syncs with employees' home phone numbers. Mobile and work phone numbers are stored in Sage HR only.

5. Log in to Sage 300 with a user that has access to Sage HR Integration screen.
6. Open the **Sync Employees** screen.
7. Click **Download Employee Changes from Sage HR** .

This will download all updates from Sage HR including the new employees.

8. After a few seconds, open the **Create Employees** from the Sage HR screen.

The new employees from Sage HR should be visible.

9. Select one employee and click the **Add Employee in Sage 300**.

- The payroll employee screen appear with some details.
- At minimum, fill up the required values then click **Add**.

10. Close the screen and repeat the above steps for subsequent employees.