Sage Payroll Link

Sage 300 and Sage HRMS
Integration Guide

Last updated: December 20, 2022

Contents

Contents

About Sage Payroll Link

Sage Payroll Link is an application to support Sage 300 Payroll integration with Sage HRMS. It is designed to easily transfer your personnel, payroll, and company data between the programs.

Sage HRMS for Sage 300

Sage HRMS for Sage 300 offers comprehensive payroll processing, training, and benefits administration to ensure your success when tackling challenging HR issues.

Sage HRMS for Sage 300 Payroll includes:

- **Sage HRMS.** A powerful solution for managing critical employee information that is ideal for businesses of any size. Sage HRMS helps you manage your company's benefits programs, track and prepare reports to ensure government compliance, and store employee forms and certificates electronically.

- **Sage HRMS Time Off.** A flexible management system for tracking employee absences and leave accruals. You can define absence codes, handle the Family and Medical Leave Act (FMLA), and manage accruals and carry-overs. Designed to meet all your attendance tracking needs, Sage HRMS Time Off can handle all types of attendance plans and employee time off.

- **Sage HRMS Train.** A skills-based training management system. You can define specific training needs, prepare compliance reports, and ensure certifications are completed on-time. You can specify training requirements for new employees based on their current skill sets and automatically update employee "Skills Profiles" upon completion of new courses.

- **Sage Employee Self Service.** The web-based employee self-service solution for Sage HRMS that includes the Employee Self Service functionality and Benefits Enrollment.

- **Sage Payroll Link.** The link for transferring employee data and earnings, deductions, and benefits information from Sage HRMS to Sage 300 Payroll.

Compatibility with Sage programs

The following table shows the various versions of Sage 300 that are compatible with Sage HRMS.

For each version, it also shows the application file name in the installation package for Sage Payroll Link version 2020 7.1C PU10 as well as the Knowledgebase article that contains the installation package.

<center>Compatible programs</center>

Sage 300 Payroll	Sage Payroll Link application file name	KB article
All supported versions of Sage 300 Payroll	SagePayrollLink2020PU10.exe	117883

Verifying Sage Payroll Link

During the installation process, verify the correct installation package name displays in the
InstallShield Wizard. After installation, you can confirm the version that was installed by selecting **Control Panel > Programs and Features**.

During the installation process, verify the correct installation package name displays in the InstallShield Wizard.

> **Warning!** If you are using a version of Sage Payroll Link other than 2020, you must *uninstall* the existing Sage Payroll Link and then install the appropriate version of Sage Payroll Link.

Installing the Sage Payroll Link update

Follow these instructions to download and install the latest update.

Before you start

- Verify that Sage HRMS and Sage 300 Payroll are installed, set up, and are working correctly.

- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access system data.

- Make sure that all users have exited and logged off of both Sage HRMS and Sage 300.

- Check which installation package is applicable to your configuration. See "Compatibility with Sage programs" (page 8) for information.

Downloading the update

1. Visit the Sage Knowledgebase at www.sageKB.com, click **Log on**, and then log on to the site.

2. In the **Search for answers** box, enter the following article ID, and press enter: 117883: Download Sage Payroll Link 7.1C PU10.

3. In the download article, click **Download Now** to launch the Sage Download Manager, or click the direct download link to download the executable file.

Installing the product update

If you have Sage Payroll Link 7.1C already installed, follow these steps to install the product update you downloaded.

1. Using your external backup procedures, back up the Sage HRMS and Sage 300 databases to a media device that is external to your Sage servers.

2. On the server where Sage 300 is installed, run the update's **.EXE** file with Administrative privileges. Depending on your configuration, you may have to right-click the file and select **Run as Administrator**.

3. Follow the prompts on the InstallShield Wizard.

4. In the **Ready to Install the Program** window, click **Install** to proceed with the installation.

5. The system displays Installation windows indicating the progress of the installation.

    When the **InstallShield Wizard Completed** window appears, click **Finish**.

> **Important!** If you configured Sage 300 using a Windows peer-to-peer network, you must install this update on the server, and repeat the steps to install the program on each workstation that will access Sage 300 and Sage Payroll Link.

Activating Sage Payroll Link

If you install this product update after you installed and configured Sage Payroll Link 7.1C, you do not have to activate it; your configuration settings remain unchanged.

Otherwise, you must activate the module so it will appear on your Sage 300 desktop.

1. Log in to Sage 300 as the Admin user.

2. Select **Administrative Services > Data Activation**.

3. Select **Sage Payroll Link** and click **Next**.

4. Review the list of applications to activate, verify Sage Payroll Link is listed, and then click **Activate**.

5. When notified that the activation is complete, click **OK**.

6. Verify that the Sage Payroll Link folder is on your Sage 300 desktop.

    The program activation is complete and you can start configuring Sage Payroll Link.

> **Note:** You must repeat these steps to activate the module for each company in Sage 300.

Next Step:

Uninstalling Sage Payroll Link

To uninstall the program:

1. Using your external backup procedures, back up the Sage HRMS and Sage 300 databases to a media device that is external to your Sage servers.

2. On the **Control Panel**, select **Programs** or **Add/Remove Programs**.

> **Note:** Depending on your operating system, you may have to select the option to **Uninstall a Program**.

3. In the list of programs, right-click **Sage Payroll Link** and select **Uninstall**.

4. Follow the prompts to complete the process.

Setup and configuration overview

Setting up Sage Payroll Link for Sage 300 is only a small part of the overall setup process. Before you start, you must install and set up:

- **Sage 300 Payroll (U.S. Payroll and/or Canadian Payroll).** For instructions, see the documents on the Sage 300 Product Documents website.

- **Sage HRMS.** For instructions, see the *Sage HRMS Installation Guide*, which is available on the Sage HRMS Product Documents website.

> **Important!** If you just installed Sage 300 Payroll, read the "Guidelines for setting up earnings, deductions, and benefits " (page 14) before setting them up in Sage 300.

Setting up Sage Payroll Link

After setting up Sage HRMS and Sage 300 Payroll, set up Sage Payroll Link:

1. Install and activate Sage Payroll Link following the instructions in the release notes provided with the executable file. Once activated, the Sage Payroll Link module appears on the Sage 300 Desktop.

2. Select **Sage Payroll Link > Sage HRMS Setup > Database Configuration** to specify the name of the Sage HRMS database. See "Setting Up Database Configuration" (page 15).

3. Select **Sage Payroll Link > Sage HRMS Setup > Employer Configuration** to link your Sage 300 Payroll system to an organizational level in Sage HRMS. See "Setting up Employer Configuration" (page 16)

4. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration** to link your Sage 300 Payroll system to an organizational level in Sage HRMS. See "Setting up employee configuration" (page 18)

5. Use the **Sage HRMS Process** window in Sage Payroll Link to transfer employee information from Sage HRMS to Sage 300 Payroll. See "Using Sage HRMS Process" (page 49).

6. Process payroll.

> **Note:** If employees were set up in Sage 300 Payroll before you add them to Sage HRMS, you must use the same employee ID in Sage HRMS that you used in Sage 300 Payroll. The employee ID is critical to tie the employees together in the two systems. Otherwise, you may have two records for the same employee when you transfer the employee records.

Guidelines for setting up earnings, deductions, and benefits

We recommend that you use the simplest settings when adding new earning and deduction codes in Sage 300 Payroll.

Best practice is to add a unique earning or deduction code for each pay frequency. For example, set up the earning codes **SALWK** for **weekly salary pay**, **SALBI** for **biweekly**, and **SALMO** for **monthly**, and then create a different profile for each earning code. If an employee's pay frequency changes, you can use the profile that corresponds to the employee's new pay frequency.

> **Note:** For more information about profiles, see "Setting up employee configuration" (page 18).

For more information, see:

- "Recommended settings for insurance benefit codes" (page 34)
- "Recommended settings for savings benefit codes" (page 37)

Setting Up Database Configuration

Use Database Configuration to specify the Sage HRMS database before you perform Employer Configuration "Setting up Employer Configuration" (page 16) or Employee Configuration "Setting up employee configuration" (page 18) .

To configure the database

1. Select **Sage Payroll Link > Sage HRMS Setup > Database Configuration**.

2. For **Sage HRMS SQL Server Name**, enter or select the machine where Sage HRMS Server is installed.

3. For **Sage HRMS Database Name**, enter the name of one of the following databases containing the employee information that will be transferred into Payroll.

   - **SageHRMS_Live** for the live database

   - **SageHRMS_DEU** for the U.S. Payroll sample database (if U.S. Payroll is installed)

   - **SageHRMS_DEC** for the Canadian Payroll sample database (if Canadian Payroll is installed)

   > **Note:** Periods (.) are not permitted in database names.

4. For **Database User** and **Database Password**, enter the SQL logon credentials.

5. Click **Test Connection** to ensure the database connections are successful.

6. Click **Save** to save the database configuration information and close the window.

Next Step: "Setting up Employer Configuration" (page 16)

Setting up Employer Configuration

You must complete Database Configuration "Setting Up Database Configuration" (page 15) before you perform Employer Configuration.

About Employer Configuration

Use the **Employer Configuration** window to specify how the user-defined Organization Levels from Sage HRMS should map to Sage 300 Payroll.

Organizations in Sage HRMS

In Sage HRMS, you can define one to five organization levels on the **Organization Titles** tab of the **Enterprise Setup** window (**Setup > System > Enterprise Setup**). When you first install Sage HRMS, three organization levels are initially defined:
Division, **Department**, and **Location**. After the organization levels are defined, you can set up the organization codes in the **Organization Codes - Enterprise** window (**Setup > Employees > Code Tables > Organization**) within each organization level (Code Type).

To configure the employer

1. Select **Sage Payroll Link > Sage HRMS Setup > Employer Configuration**.

2. In the **Employer Configuration** window, click the appropriate tab (either **U.S. Payroll** or **Canadian Payroll**), and then select either the **Use Interface - U.S. Payroll** or **Use Interface - Canadian Payroll** check box to activate the connection to Sage 300 Payroll.

   > **Note:** Clear the check box to temporarily disengage the integration for maintenance or other purposes.

3. For **Link Payroll Company to U.S. Payroll** or **Link Payroll Company to Canadian Payroll**, select the organizational relationships between Sage 300 Payroll and Sage HRMS.

> **Note:** You always have the option to link the Payroll company to the **Employer** organization level, regardless of your setup in Sage HRMS. Select this option for the most comprehensive integration that supports transferring employees, earnings, deductions, benefits, accruals, and other payroll and HR-related details.

For example, if you set up your organization levels in Sage HRMS using Department, Division, Employer, and Zone, you would choose to link one of those levels:

- **Department.** Choose this option to configure only a department relationship between Sage 300 and Sage HRMS. After selecting **Department**, you specify the related organization code (for the department) in the **Sage HRMS Org. to Payroll** field.

- **Division.** Choose to configure only the division relationship between Sage 300 and Sage HRMS. After selecting **Division**, you specify the related organization code (for the division) in the **Sage HRMS Org. to Payroll** field.

- **Employer.** Choose to configure the company, which provides the most complete integration that Sage Payroll Link can offer. If you select this, you only have to specify the Sage HRMS employer to link.

- **Zone.** Choose to configure only the zone relationship between Sage 300 and Sage HRMS. After selecting **Zone**, you specify the related organization code (for the zone) in the **Sage HRMS Org. to Payroll** field.

4. For **Sage HRMS Employer to Payroll** (U.S. or Canadian), select the Sage HRMS employer or company that includes the employees you want to transfer.

5. Depending on your selection in step 3, the **Sage HRMS Org. to Payroll** field appears and you are required to specify the related organization code set up for the organization level.

6. Click **Save** and **Close** the window.

Next Step:

Setting up employee configuration

You must complete <u>Database Configuration</u> <u>"Setting Up Database Configuration" (page 15)</u> and <u>Employer Configuration</u> <u>"Setting Up Database Configuration" (page 15)</u> before you perform Employee Configuration.

About employee configuration

Use the **Employee Configuration** window to create configuration profiles. Within each profile, you map employee records in Sage 300 Payroll to fields in Sage HRMS field by field. Later when you process payroll, you will select the profile for which you want to transfer updates between the systems.

Creating user-defined employment and pay fields

In Sage HRMS, you can use four employment and four pay fields to map to functional fields in Sage 300 Payroll. You can specify the field labels and then enter employee-specific data in the fields for tracking or reporting purposes. For example, you could use these fields for driver's license numbers, security clearances, uniform sizes, or the results of pre-employment screenings.

To set up user-defined employment and pay fields

1. In Sage HRMS, select **Setup > Employees > HR Setup**, and then select the company.

2. On the **HR Options** tab of the **HR Setup** window, enter labels for the user-defined fields you want to use.

   - **User-Defined Employment** fields will display on the **User Defined** tab of the employee's **HR Status** tab.

   - **User-Defined Pay** fields will display on the **User Defined** tab of the employee's **Current Pay** tab.

3. Click **Apply** to save your changes, and then click **OK** to close the page.

4. For each employee, enter the values in the user-defined fields.

    a. Select **Employees > View/Edit Employee**.

    b. Select an employee, click the **Personal** tab (at the top), click the
       HR Status tab, and then click the **User Defined** tab.

    c. Enter values for each user-defined employment field for the employee.

    d. Click **Apply** to save your changes.

    e. Select the **Job and Pay** tab (at the top), click the **Current Pay** tab, and
       then click the **User Defined** tab.

    f. Enter values for each user-defined pay field for the employee.

    g. Click **Apply** to save your changes.

    h. Click **OK** to close the page.

Creating employee configuration profiles

> **Tips:**
>
> - Best practice is to set up your profiles by pay frequency. This way, when you
>   later use the Sage HRMS Process to update your system, you can manage the
>   updates as part of your payroll processing routine.
>
> - We recommend that you set up a profile for paying bonuses.

To create a new employee configuration profile

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. At the top of the **Employee Configuration** page, enter the following information
   for the new configuration profile:

   - **Profile ID**: Enter an identifying name or code for the profile (no more than 20
     alphanumeric characters).

     After entering the Profile ID, the program refreshes with data from your
     Sage 300 Payroll and Sage HRMS setups.

   - **Profile Description**: Enter a description or name for the profile (no more
     than 60 alphanumeric characters).

   - **Payroll Module**: Displays either **US Payroll Module** or **CA Payroll Module**
     depending on the employer database you configured. You cannot change

this setting–it is specific to the payroll module for the company you are configuring.

3. Click **Add** to create the profile.

   The program updates the tables in all tabs with the payroll settings defined in Sage 300 Payroll.

4. Map the fields between each system by double-clicking the cells and selecting from the available options.

   Typically columns that require mapping show **None** and are under the **Sage HRMS** column. However, some additional columns require mapping for a successful integration. The drop-down lists show fields from Sage HRMS.

5. Choose each tab to map data from Sage HRMS to Payroll.
   Review the following topics to learn more about each **Employee Configuration** tab:

   - "Mapping demographics" (page 22)
   - "Mapping classes and class codes" (page 26)
   - "Mapping cost center codes" (page 27)
   - "Mapping earning codes" (page 30)
   - "Mapping deduction and benefit codes" (page 31)
   - "Mapping advance codes" (page 38)
   - "Mapping expense reimbursement codes" (page 40)
   - "Mapping accrual codes" (page 42)
   - "Mapping shift differential schedules" (page 45)

   > **Note:** You cannot delete rows in the tables of data on each tab, because the data is retrieved from your system (so you can configure it). If you do not have a corresponding Sage HRMS field to map, leave **None** in the field.

6. After mapping all tabs, click **Save** and then click **Close** to close the window.

To delete an employee configuration profile

If you created a profile by mistake or no longer need a profile, click **Delete**.

Next Step: See "Using Sage HRMS Process" (page 49) to update your system.

Mapping demographics

Use the **Demographics** tab on the **Employee Configuration** page to map demographic fields between Sage HRMS and Sage 300 Payroll. This information determines how new employees in Sage HRMS will be added to Sage 300 Payroll when you use the Sage HRMS Process to update.

Mapping guidelines

Most of the Sage 300 Payroll demographics fields (on the Payroll Employee window) must be mapped to user-defined employment and pay fields set up in Sage HRMS.

Certain rules are static and are not shown in the mapping tables. For example, the employee **Last Name** in Sage 300 Payroll automatically maps directly to the employee **Last Name** field in Sage HRMS.

System mapping occurs for the following demographic fields in Sage 300 Payroll on the Payroll Employee window:

- **State/Prov. (General tab)**

  If the State/Prov code does not exist in the U.S. States or Territories tables or Canadian Provinces or Territories tables, the system sets the State/Prov code to the first code from the table. If the country is other than U.S. or Canada, the system transfers the State/Prov code as it is entered in Sage HRMS.

  If you use Canadian Payroll and the Employment Equity Reporting functionality, you must set up the employee work and residential provinces correctly in Sage HRMS for the information to transfer.

  For Canadian employees who live and work in the same province:

  In Sage HRMS, select **Employees > View/Edit Employee > Personal > Demographics**, click the **Address and Phone** sub-tab, and enter the employee's address and select the province (of residence).

  > **Important!** If you use the **EE Reporting** feature (**View/Edit Employee > Demographics > Personal** sub-tab), you must select the **Employment Province** (same as the residence in this case) on the EE Groupings sub-

> tab for the information to update Payroll.

For Canadian employees who live and work in different provinces:

1. In Sage HRMS, select **Employees > View/Edit Employee > Personal > Demographics**, click the **Address and Phone** sub-tab, and enter the employee's address and select the province (of residence).

2. Click the **Personal** sub-tab, then select the **EE Reporting** check box so the **EE Groupings** sub-tab appears.

3. Click the **EE Groupings** sub-tab, then select the **Employment Province**.

- **Status (Class/Schd tab)**

  The system maps this to **Employee Status** on the **Job and Pay > Current Job > Job** sub-tab in Sage HRMS.

  - **LOA** and **Not Employed** status settings in Sage HRMS become **Inactive** in Sage 300 Payroll.
  - **Dependent (COBRA)** and **Terminated** status settings in Sage HRMS become **Terminated** in Sage 300 Payroll.

- **Hire Date (General tab)**

  The system maps this to the **Last Hire Date** on the **Personal > HR Status > Seniority** sub-tab in Sage HRMS.

- **Last Review Date (General tab)**

  The system maps this to **Performance Review** on the **Job and Pay > Current Pay > Pay and Performance** page in Sage HRMS.

- **Last Raise Date (General tab)**

  The system maps this to the latest date for **Effective** in the table on the **Job and Pay > Job History** tab in Sage HRMS.

- **Inactive Date (General tab)**

  The system maps this to the **Change Effective** date on the **Job and Pay > Current Job > Job** sub-tab in Sage HRMS if the **Employee Status** in HRMS is not **Active** or **Terminated**. (If the **Employee Status** is **Active** or **Terminated**,

the **Inactive Date** should be blank.)

- **Termination Date (General tab)**

  The system maps this to the **Change Effective** date on the **Job and Pay
  > Current Job** page in Sage HRMS if the **Employee Status** in HRMS
  is **Terminated**. (If the **Employee Status** is not **Terminated**, the **Termination Date**
  should be blank.

To map demographics

> **Note:** You must have user-defined fields set up in Sage HRMS if you want to map
> some demographics codes to Sage HRMS data.

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select a Profile ID that was previously created, and then click the **Demographics**
   tab.

   The system updates the table with demographic details that are available to map.

3. Specify the settings for the demographic fields in the **Sage HRMS Field** column.

   - **Emergency Phone.** Select the HRMS employee field that you want mapped to
     the Emergency Contact **Phone** field in Sage 300 Payroll (**Payroll Employee
     > Other** tab).

   - **Notes.** Select one of the four user-defined Employment and four user-defined
     Pay fields in Sage HRMS. This maps to the Notes in Sage 300 Payroll
     > **Payroll Employee > Other** tab.

   - **Overtime Calculation.** Select one of the four user-defined Pay fields in Sage
     HRMS. The OT Calculation FLSA-Salary Fluctuating (U.S. Payroll), Regular
     Rate-Salary Fluctuating (Canadian Payroll) option can only be assigned to an
     employee with a Weekly pay frequency. If the employee pay frequency is other
     than Weekly, a warning will appear during the transfer process.

   - **Overtime Schedule.** Select one of the four user-defined Pay fields in Sage
     HRMS. When the HRMS Overtime Schedule is mapped to a Payroll Overtime
     Schedule that uses **Compensatory Time**, you must also map a Compensatory
     Time Accrual Code in the Accrual Employee Configuration. In Sage HRMS,

Compensatory Time must be set up for the Time Off plan. For the Compensatory Time Accrual to be transferred, verify that the **As Of Date.** in HRMS Attendance Summary is the same as the **Period End Date**.

- **Part-Time.** Select **Part-time Worker** to specify which HRMS Employee Type codes represent part-time status in the bottom table on this window. For each **Employee Type** code that qualifies as part-time, double-click the field in the **Sage 300 Code** column and change it from False to **True**. The next time you use the Sage HRMS Process, the **Part-Time Worker** check box will be selected on the **Sage 300 > Payroll Employee > Pay** tab.

- **Phone.** Select the HRMS employee field that you want mapped to the **Phone** field in Sage 300 Payroll (**Payroll Employee > General** tab).

- **WCC Group.** Select from the following if defined in HRMS: four user-defined Employment fields, four user-defined Pay fields, and Employee Custom Fields. WCC Groups must be set up in Sage 300 Payroll before you can map them to HRMS codes.

- **Workers' Compensation Code.** Select from the following if defined in HRMS: four user-defined Employment fields, four user-defined Pay fields, and Employee Custom Fields. If WCC Group is set to None, the Worker's Compensation Code cannot be edited.

- **Work Classification Code.** Select from the user-defined employment fields, user-defined pay fields, and Employee Custom Fields. Work Classification Codes must be set up in Sage 300 Payroll before you can map them to HRMS codes.

- **Registered Pension Plan Number (Applicable to Canadian Payroll only).** Select from the user-defined employment fields, user-defined pay fields, and Employee Custom Fields. The RPP Number must only contain numbers–a process error will result when the RPP Number in HRMS has dashes or other characters.

- **Employment Status (Applicable to Canadian Payroll only).** Select the field to open the **Canadian Additional Status** field column. Select **Printed for Inactive or Terminated Status** or **Unprinted for Inactive or Terminated Status** for the purposes of including or excluding employees from the Record of Employment report in Payroll.

4. Click **Save**.

5. Repeat steps 2-4 for each Profile ID set up in Employee Configuration.

Mapping classes and class codes

Use the **Class** tab on the **Employee Configuration** page to map class fields between Sage HRMS and Sage 300 Payroll.

In Sage HRMS, classes and corresponding class codes can be used for sorting and selecting data.

Mapping guidelines

There are no standard settings in Sage HRMS similar to the Sage 300 Payroll class codes. As a result, Sage 300 Payroll class codes must be mapped to user-defined code tables, then each class code can be mapped to the corresponding code from the selected Sage HRMS code table.

- Up to four classes can be set up in Sage 300 Payroll.
- Each class can have an unlimited number of class codes.
- Class codes can be assigned to each employee, and then used for sorting and selecting data.

> **Note:** If a Sage 300 Payroll class does not include any class codes, the class will not be shown in Employee Configuration.

An example of classes and class codes

Class 1 is set up as an office location with corresponding class codes of East Side Location, Central Office, and West Side Location. Data can be sorted to identify employees working in the Central Office by selecting the Central Office class code in the **Class 1** field.

To map class codes

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select a Profile ID that was previously created, and select the **Class** tab.

   The system updates the table with the Class codes set up in Sage 300 Payroll.

3. Select the **Map Option** and **Sage HRMS Field** from the drop-down menus.

4. Double-click the cells in the **Sage HRMS** column to select from the list of Sage HRMS codes.

5. Click **Save**.

6. Repeat steps 2-5 for each Profile ID set up in <u>Employee Configuration</u>.

Mapping cost center codes

Use the **Cost Center** tab on the **Employee Configuration** page to map Sage 300 General Ledger account segment cost center codes to employees in Sage HRMS.

> **Note:** This tab only displays if **Use Cost Center Override** is selected in the **Payroll Setup G/L Integration** window and cost center override is configured for employees. See the Payroll help topic titled *Using Cost Center Overrides* for more information.

Mapping guidelines

The segments specified will be used as the default account segments when payroll transactions are posted in General Ledger.

- If account segments are set up by department, the department codes can be assigned to each employee.

- If **Use Cost Center Override** is not selected, the Cost Center tab on the **Employee Configuration** page will be hidden.

- If **Use Cost Center Override** is selected, but **None** is selected for the **Use Cost Center Override in Accounts** field, the Cost Center tab on the **Employee Configuration** page will be hidden.

- In all other situations (when you select **Use Cost Center Override** and **Override Expense Accounts** or **Override Expense and Liability Accounts**), the **Cost Center** tab will be displayed. Also, you will have a choice to map Payroll segments to Organization Codes from Sage HRMS or to user-defined tables. After selecting an organization code or a user-defined table, you must map each individual segment to the value of the organization code table or user-defined table.

Examples of account segment setups

Example 1: Account segments are set up by departments

The department codes are 100, 200, 300, and 400.

G/L accounts are set up as follows for account 6720 Wages and benefits:

- 6720 – 100: Wages and benefits, dept 100
- 6720 – 200: Wages and benefits, dept 200
- 6720 – 300: Wages and benefits, dept 300
- 6720 – 400: Wages and benefits, dept 400

An employee who works in department 100 will be assigned the Department segment code 100, and an employee who works in department 200 will be assigned the Department segment code 200. As a result, when payroll transactions are posted in General Ledger, the 6720 expense account will be overridden with account 6720-100 for all employees who work in department 100 and 6720-200 for all employees who work in the department 200.

Example 2: G/L accounts are structured by products

A company manufactures desks, chairs, and shelves.

The product line G/L segments are:

- 100 - desks
- 200 - chairs
- 300 - shelves

G/L accounts are set up as follows for account 6720 Wages and benefits:

- 6720 – 100 Wages and benefits, desks
- 6720 – 200 Wages and benefits, chairs
- 6720 – 300 Wages and benefits, shelves

All employees who work in desk production will be assigned segment code "100" in the Product Line segment; employees who work in chair production will be assigned segment code "200", and so on.

To map cost center codes

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.
2. Select the Profile ID that was previously created, and select the **Cost Center** tab.

The system updates the table with the Cost Center codes set up in Sage 300 Payroll.

3. Select the **Map Option** and **Sage HRMS Field** from the drop-down menus.

4. Double-click the cells in the **Sage HRMS** column to select from the list of Sage HRMS codes.

5. Click **Save**.

6. Repeat steps 2-5 for each Profile ID set up in Employee Configuration.

Mapping earning codes

Use the **Earning** tab on the **Employee Configuration** page to map earning codes between Sage HRMS and Sage 300 Payroll.

Mapping guidelines

Salary Pay, Hourly Pay, and Bonus Pay are the most common earning codes. Before you can map earning codes between the two programs, you must set up the earning codes in Payroll on the Earning/Deduction Codes setup window using the guidelines in the following table.

Earning code guidelines

	Salary Pay	Hourly Pay	Bonus Pay
Category	Earning	Earning	Earning
Type	Salary & Wages	Salary & Wages	Salary & Wages
Employee Calculation Method	• Flat • Fixed	• Hourly Rate • Amount per Hour	• Flat • Fixed
Sage HRMS selections include	• Salaried • User-defined Employment and Pay fields	• Hourly • User-defined Employment and Pay fields	• Bonus • User-defined Employment and Pay fields

> **Tip:** When a bonus is updated in the Sage HRMS Process, the **Ends** (date) on the **Employee Payroll > Pay** tab is populated with the payroll **Period End Date**. This is to prevent the bonus from being paid regularly each payroll period. Because of this, we recommend that you set up a separate Employee Configuration profile for bonuses.

To map earning codes

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID that was previously created, and select the **Earning** tab.

The system updates the table with the earnings codes set up in Sage 300 Payroll.

3. Specify the settings for each earnings code set up in Sage 300 Payroll:

    - **Sage HRMS.** Double-click the cells in this column to select from the Sage HRMS earnings.

    - **Conversion Factor.** The conversion factor defaults to 1.00, but you can enter a number by which the earning rate should be multiplied (which can be a decimal to decrease it).

    - **Dist Code Maps To.** Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each earning.

        > **Note:** You can leave this setting blank and instead select a specific distribution code from Sage HRMS with **All Sage HRMS Codes Map to one Dist. Code**.

    - **All Sage HRMS Codes Map To One Dist. Code.** Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each earning.

        The default value is the first distribution code related to the earning in Payroll.

    - **Transfer Default Hour?** Select **Yes** to have the system update the employee's default hours for this earning. The update passes the **Hours/Units** from the employee in Sage HRMS (Job and Pay > Current Pay) and posts to the **Default Hours** for the earning for the employee in Sage 300 Payroll (Pay tab).

4. Click **Save**.

5. Repeat steps 2-4 for each Profile ID set up in <u>Employee Configuration</u>.

Mapping deduction and benefit codes

Use the **Deduction/Benefit** tab on the **Employee Configuration** page to map deductions and benefits codes between Sage HRMS and Sage 300 Payroll.

Mapping guidelines

Benefits and deductions are set up differently in Sage HRMS and Sage 300 Payroll.

- In Sage HRMS, employer and employee portions of a benefit premium are set up in one place (Insurance Benefits table).

- In Sage 300 Payroll, the employer and employee portions of a benefit premium may be set up in two parts (as two unique codes)–with one Benefit code for the employer portion, and one Deduction code for the employee deduction.

  Alternatively, the benefit can be set up once as a Deduction code leveraging the Employee and Employer tabs in the Earning/Deduction Codes setup window.

- When using the Sage HRMS Process to update deductions, the program transfers the amount based on the employee's contribution frequency set up in Sage HRMS. Best practice is to select a frequency for the Sage 300 Payroll benefit/deduction code that matches the employee's contribution frequency in Sage HRMS.

To map deduction and benefit codes

The mapping options available from the drop-down menus are dependent on how the deduction and benefit codes are set up in Payroll. The selections are also interdependent on the other mapping selections for each code. For example, if you choose the Calculation Type of Employee Only, the Employer Portion Cal Type field is not relevant and it defaults to System Calculate.

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID previously created, and select the **Deduction/Benefit** tab.

   The system updates the table with the deduction codes set up in Sage 300 Payroll.

3. Specify the settings for each deduction code set up in Sage 300 Payroll.

   - **Ded/Ben Code Maps to.** Select **Benefit Type**, **Benefit Code**, or **User Defined**.

   - **Sage HRMS.** Double-click the cells in this column and select from the list of codes or benefit types in Sage HRMS. (The choice depends on the mapping setting selected for **Ded/Ben Code Maps to**.)

   - **Calculation Type.** Depending on how the code is set up in Payroll, you can choose from **Do Not Calculate**, **Employee Only**, **Employer Only**, and **Calculate Both**. If you select **Do Not Calculate**, the system will calculate based on the deduction or benefit code setup in Payroll.

- **Employer Portion Cal. Type.** Defaults to **System Calculate** if you map the code to a Benefit Type or Benefit Code from Sage HRMS. If you select **Other Calculated Amount Field**, you must prorate the amount for one pay period based on the employee's benefit code pay frequency.

- **Conversion Factor.** The conversion factor defaults to 1.00, but you can enter a number by which the deduction rate should be multiplied (which can be a decimal to decrease it). Typically a conversion factor is used when you have multiple pay frequencies and the benefits that are set up with a base rate; the rates can be converted for each pay frequency.

- **Dist Code Maps To.** Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for benefit and deduction code.

  > **Note:** You can leave this setting blank and instead select a specific distribution code from Sage HRMS with **All Sage HRMS Codes Map to one Dist. Code**.

- **All Sage HRMS Codes Map To One Dist. Code.** Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each benefit and deduction code.

4. Click **Save**.

5. Repeat steps 2-4 for each Profile ID set up in Employee Configuration.

About employee and employer calculations

If a deduction or benefit is set up in two parts (two separate codes) in Sage 300 Payroll for the Employer and Employee portions, you can map the two Payroll codes to a single Sage HRMS benefit code. However, it is critical that you carefully specify the Calculation Types to prevent duplications in payroll.

Example:

- Sam's Coffee Company set up two codes in Payroll for their 401(k) retirement plan:

  1. **401K-ER** is the employer portion of the non-cash benefit.

  2. **401K-EE** is the employee portion of the deduction.

- In Sage HRMS, they set up a single benefit code: **401K Plan**.

- When they map the codes on the **Employee Configuration > Deduction/Benefit** tab, they use the following settings:

Mappings and settings

Payroll deduction code	Ded/Ben code maps to	Sage HRMS	Calculation type	Employer portion cal. type
401K-ER	Benefit Code	401K Plan	Employee Only	System Calculate
401K-EE	Benefit Code	401K Plan	Employer Only	System Calculate

> **Note:** Alternatively, they could specify **Calculation Type** = **Do Not Calculate** for one Payroll code and **Calculation Type** = **Calculate Both** for the other.

Recommended settings for insurance benefit codes

To set up insurance benefit codes, select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration** and click the **Deduction/Benefit** tab.

Insurance benefit code types

- Accidental Death/Dismemberment
- Dental
- Life
- Medical
- Prescriptions
- Supplemental Life
- Long Term Disability
- Vision

Each benefit type can have several benefit codes.

- You can only map multiple benefit codes if they have the same Benefit Type.
- To map multiple benefit codes, you must map by benefit type. Select **Benefit Type** for **Ded/Ben Code Maps to** in the mapping table.

Mapping multiple benefit codes

- The **Effective Date** of the plan that was created the earliest is set as the **Start Date**.

- The deduction amounts are added based on the **Period Start** and **End Dates** on the
  [Sage HRMS Process](#).

- If the **Effective Date** is after the **Period End Date**, the deduction amounts will not be
  transferred. However, the deduction **Start** and **End** dates will be transferred.

- If the plans have different effective and expiration dates, we recommend that you use
  a one-to-one mapping.

- For one-to-one mapping, select **Benefit Code** for **Ded/Ben Code Maps to** in the
  mapping table.

Recommended settings for a taxable insurance benefit

If the benefit is taxable:

1. On the Employee Configuration **Deduction/Benefit** tab:

   - For the employer portion, select **Employer Only** for the **Calculation Type**.

   - For the employee portion, select **Employee Only** for the **Calculation Type**.

2. Use the settings in the following table.

Benefit settings

	Employer portion	Employee portion
Category	Benefit	Deduction
Employer Calculation Method	Flat	None
Employee Calculation Method	None	Flat
Frequency	Use the employee contribution frequency in HRMS	Use the employee contribution frequency in HRMS
Post Benefit to General Ledger	Checked	

Recommended settings for a non-taxable insurance benefit

You have two options:

Option 1: Use one setting:

1. On the Employee Configuration **Deduction/Benefit** tab, select **Calculate Both** for the **Calculation Type** .

2. Use the settings in the following table.

Benefit settings

	Non-taxable benefit
Category	Deduction
Employee Calculation Method	Flat
Employer Calculation Method	None
Frequency	Use the employee contribution frequency in HRMS

Option 2: Use two settings:

- Use a Category of Benefit for the employer portion.
- Use a Category of Deduction for the employee portion (just like the settings for a taxable benefit).

Recommended settings for savings benefit codes

To set up savings benefit codes, select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration** and click the **Deduction/Benefit** tab.

Sage HRMS allows for two types of savings contributions: **Amount** and **Percent**. The following table shows the recommended settings for each savings benefit code type.

Benefit settings

	Amount type	Percent type
Category	Deduction	Deduction
Employee Calculation Method	Flat	Percentage of Base
Employer Calculation Method	Flat	Percentage of Base
Frequency	Use the employee contribution frequency in Sage HRMS	Use the employee contribution frequency in Sage HRMS

> **Note:** For the **Percent** savings contribution type, the percentage will be updated in the Sage HRMS Process. Because the calculation method is **Percentage of Base**, you must ensure that the **Calculation Base** for the earning/deduction code is set up correctly in Payroll. If some earnings are not included in the calculation base, the amount calculated in payroll may not match the amount calculated and updated in the Sage HRMS Process.

Mapping advance codes

Use the **Advance** tab on the **Employee Configuration** page to map payroll advance codes between Sage HRMS and Sage 300 Payroll.

Mapping guidelines

Advance codes are set up in Sage 300 Payroll using the **Earning/Deduction Codes** setup window and the settings are similar to earnings codes. There are no standard settings in Sage HRMS similar to the Sage 300 Payroll advance codes. As a result, Sage 300 Payroll advance codes must be mapped to the corresponding user-defined code in a

user-defined code table in Sage HRMS. You can map advance codes to four user-defined employment fields and four user-defined pay fields in Sage HRMS.

> **Note:** User-defined fields must already be set up in Sage HRMS if you want to map Payroll codes to Sage HRMS data. Learn more.

To map advance codes

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID previously created, and select the **Advance** tab.

   The system updates the table with the advance codes set up in Sage 300 Payroll.

3. Specify the settings for each advance code set up in Sage 300 Payroll:

   - **Sage HRMS**. Double-click the cells in this column to select from the list of user-defined Employment and Pay fields in Sage HRMS.

   - **Conversion Factor**. After specifying the corresponding Sage HRMS code, the conversion factor defaults to 1.00. You can enter a number here for which the earning rate should be multiplied (or a decimal to divide it). This field is generally used to convert single rates into factors for multiple pay frequencies.

Conversion factors may be useful if a rate is $10 per week and you have both weekly and biweekly payroll. You can set up the rate at $10, then for your weekly profile, set the conversion factor to 1.0. Then, set the biweekly profile conversion factor to 2.0 and the rate will calculate $20.

- **Dist Code Maps To**. Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each advance code.

  > **Note:** You can leave this setting blank and instead select a specific distribution code from Sage HRMS with **All Sage HRMS Codes Map to one Dist. Code**.

- **All Sage HRMS Codes Map To One Dist. Code**. Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each advance code.

  The default value is the first distribution code related to the earning in Payroll.

4. Click **Save**.
5. Repeat steps 2-4 for each Profile ID set up in Employee Configuration.

Mapping expense reimbursement codes

Use the **Expense Reimbursement** tab on the **Employee Configuration** page to map payroll advance codes between Sage HRMS and Sage 300 Payroll.

Mapping guidelines

Expense reimbursement codes are set up in Sage 300 Payroll using the Earning/Deduction Codes setup window and the settings are similar to earnings codes. There are no standard settings in Sage HRMS similar to the Sage 300 Payroll reimbursement codes. As a result, Sage 300 Payroll expense reimbursement codes must be mapped to the corresponding user-defined code in a user-defined code table in Sage HRMS. You can map expense reimbursement codes to four user-defined employment fields and four user-defined pay fields in Sage HRMS.

> **Note:** User-defined fields must already be set up in Sage HRMS if you want to map Payroll codes to Sage HRMS data. [Learn more.](#)

To map expense reimbursements

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID [previously created](#), and select the **Expense Reimbursement** tab.

   The system updates the table with the expense reimbursement codes set up in Sage 300 Payroll.

3. Specify the settings for each code set up in Sage 300 Payroll.

   - **Sage HRMS**. Double-click the cells in this column to select from the list of Sage HRMS user-defined codes.

   - **Conversion Factor**. After specifying the corresponding Sage HRMS code, the conversion factor defaults to 1.00. You can enter a number here for which the earning rate should be multiplied (or a decimal to divide it). This field is generally used to convert single rates into factors for multiple pay frequencies.

     Conversion factors may be useful if a rate is $10 per week and you have both weekly and biweekly payroll. You can set up the rate at $10, then for your weekly profile, set the conversion factor to 1.0. Then, set the biweekly profile conversion factor to 2.0 and the rate will calculate $20.

   - **Dist Code Maps To**. Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each code.

     > **Note:** You can leave this setting blank and instead select a specific distribution code from Sage HRMS with **All Sage HRMS Codes Map to one Dist. Code**.

   - **All Sage HRMS Codes Map To One Dist. Code**. Select an organizational level code (such as a Division, Department, Location, or a user-defined code set up in Sage HRMS) for each code.

The default value is the first distribution code related to the expense
reimbursement in Payroll.

4. Click **Save**.

5. Repeat steps 2-4 for each Profile ID set up in <u>Employee Configuration</u>.

Mapping accrual codes

Use the **Accrual** tab on the Employee Configuration window to map accrual codes
between Sage HRMS and Sage 300 Payroll.

Mapping guidelines

You can map accrual codes that you set up in Sage 300 Payroll to Sage HRMS Time Off
codes and then generate timecards. These timecards can then be used in payroll, which
then generates attendance and absence transactions (to record vacation or sick time
taken) in Sage HRMS.

In Sage HRMS, when you add an absence transaction for an employee, you must
indicate the day the absence occurred and the number of hours taken. When you run the
Sage Payroll Link > Sage HRMS Process process, the following information is
transferred:

- Accrual rates

- Accrual balances

- Amounts accrued with each payroll

- Time off paid to reduce accrual balances

About accrual calculations and absence transactions

You can set up accruals to calculate based on rules defined either in Sage 300 Payroll or
Sage HRMS, depending on the setting for **Accrual Calculate By**.

> **Important!** Sage HRMS can use both days and hours as absence units, but
> Payroll only supports hours as absence units. Thus, *you must use hours as*
> *absence units* when you set up Time Off in Sage HRMS.

Sage HRMS accrual

Set **Accrual Calculate by** to **Sage HRMS Accrual**.

Time Off absence transactions can be created in two ways with this configuration:

- Through the **Accrue Time** process in Sage HRMS Time Off. The program generates timecards with payment and accrual lines (as applicable) when time off is accrued and absence transactions are posted in Sage HRMS.

- Through processing and posting payroll if the time off taken is entered in payroll instead of Sage HRMS. After you use the Sage HRMS Process and click **Transfer Time Taken**, the absence transactions are created in Sage HRMS Time Off.

The accrual balances for employees might be overstated if you transfer accruals when timecards from previous transfers have not been posted. Accruals should not be transferred if:

- The **Calculate Payroll** process has been performed in Payroll, but payroll checks have not been posted.

- Manual checks have been entered and processed in Sage 300 Payroll, but have not been posted.

To avoid overstating balances, you can delete any timecards generated by the Sage Payroll Link > Sage HRMS Process process that were not yet posted before transferring accruals.

Payroll accrual

Set **Accrual Calculate by** to **Payroll**.

- The program creates Time Off absence transactions and updates employee plan balances after payroll is processed.

- You must click the **Transfer Time Taken** button on the Sage HRMS Process window for this update to occur.

- Timecards for payment or accruals are not created because this information is managed within Payroll.

> **Important!** Updating all records could take considerable time, depending on the number of records to be updated. To save time, update the least possible amount of records. However, **Update All** would be the best choice if you have made significant employee configuration mapping changes or if you have imported data from another application.

To map accrual codes

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID previously created, and select the **Accrual** tab.

   The system updates the table with the accrual codes set up in Sage 300 Payroll.

3. Specify the settings for each accrual code set up in Sage 300 Payroll.

   - **HRMS Absence Reason Code**. Double-click the cells in this column to select from the list of absence reason codes in Sage HRMS. This is used to collect absence transactions information from Time Off

     If you want Sage HRMS to transfer accrual records to Payroll without creating a payment timecard, you must enter absent time directly into Sage 300 Payroll. For this configuration, select **None** for **HRMS Absence Reason Code**.

   - **HRMS Attendance Plan Code**. Double-click the cells in this column to select from the list of Sage HRMS attendance plan codes. This is used to get the attendance information from Time Off (such as year carryover, accrued, or hours available).

- **Dist Code Maps To**. Select an organizational level code (such a Division, Department, Location, or a user-defined code set up in Sage HRMS for each accrual code.

    > **Note:** You can leave this setting blank and instead select a specific distribution code from Sage HRMS with **All Sage HRMS Codes Map to one Dist. Code**.

- **All Sage HRMS Codes Map To One Dist. Code**. Select an organizational level code (such a Division, Department, Location, or a user-defined code set up in Sage HRMS for each accrual code.

    The default value is the first distribution code related to the accrual code in Payroll.

- **Accrual Calculate By**. Select either **Sage HRMS Accrual** or **Payroll**, which specifies which program's accrual rules to follow when you process payroll.

    > **Note:** If you want the accruals to be calculated by the plan rules set up in Sage HRMS, you must select an **HRMS Attendance Plan Code** and select **Sage HRMS Accrual**.

4. Click **Save**.
5. Repeat steps 2-4 for each Profile ID set up in Employee Configuration.

Mapping shift differential schedules

Use the **Shift Diff Schedule** tab on the **Employee Configuration** page to map payroll shift differential schedule codes between Sage HRMS and Sage 300 Payroll.

Mapping guidelines

Shift differential schedules exist in both the Sage HRMS and Sage 300 Payroll programs, but their configurations are different.

- In Sage 300 Payroll:

    - There can be an unlimited number of schedules.

    - Each schedule can have up to four shifts.

    - Each shift can have a differential rate (an amount per hour paid in addition to the regular pay).

- In Sage HRMS:

    - There can be only one schedule (specified in the Shift Differential Codes code table).

    - In that schedule, there can be an unlimited number of shifts.

    - Each shift can have a differential rate (amount or percentage per hour).

Mapping Options

The Sage 300 Payroll Shift Differential Schedule and related shifts can be mapped to the following types of codes in Sage HRMS:

- HRMS shift differential codes
- Four user-defined employment fields
- Four user-defined pay fields
- User-defined code table

Although the differential rates for shifts in Sage HRMS can be different from the rates in Sage 300 Payroll, when each Sage 300 Payroll shift is mapped to an Sage HRMS shift, the differential rate in the Sage 300 Payroll shift will be used.

You can select a shift for an employee and change the shift premium for this employee on the **Current Pay** window in Sage HRMS. This change is not available in Sage 300 Payroll after you run the "Using Sage HRMS Process" (page 49). The differential rate assigned to the mapped shift in Payroll will be used in the employee's pay calculations instead of the rates from shifts in Sage HRMS.

To map shift differential schedules

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID previously created, and select the **Shift Diff. Schedule** tab.

   The system updates the table with the shift differential schedule codes set up in Sage 300 Payroll.

3. Select the **Map Option** and **Sage HRMS Field** from the drop-down menus.

   > **Note:** You must have user-defined fields set up in Sage HRMS if you want to use the user-defined field options. Otherwise, select the Map Option **Shift Diff. Code** and the Sage HRMS Field **Sage HRMS Shift Codes**.

4. Double-click the cells in the **Sage HRMS** column to select from the list of Sage HRMS shift codes.

5. Click **Save**.

6. Repeat steps 2-5 for each Profile ID set up in Employee Configuration.

Using Sage HRMS Process

To update employee information between Sage HRMS and Sage 300, use the **Sage HRMS Process** in Sage Payroll Link.

> **Tip:** Best practice is to run this process both before and after processing payroll.

To process Sage HRMS updates

1. Select **Sage Payroll Link > Sage HRMS Process** and double-click the Sage HRMS Process icon to open the window.

   > **Note:** Only one user can access this process at a time. When this window is open, no configuration (payroll setup) windows can be opened.

2. Select the **Profile ID** for the employees whose information you want to update.

3. Enter (or select using the calendar) the **Period Start** and **End Date**.

4. Select the information you want to update.

   - **Update Time Off**: Only time off information will be synced. This includes changes mapped to the current **Accruals** tab in the Employee Configuration window as well as any predefined fields.

   - **Update Pay Information**: Only payroll information will be synced. This includes changes mapped to the current **Earnings, Cost Center, and Shift Diff** tab in the Employee Configuration window as well as any predefined fields.

   - **Update Benefits**: Only benefits information will be synced. This includes changes mapped to the current **Deduction/Benefit** tab in the Employee Configuration window as well as any predefined fields.

   - **Update All**: Updates all of the above information.

   > **Important!** If you select **Update All**, the process could take more time. Thus to save time, best practice is to update the least amount of records.

> However, **Update All** would be the best choice if you made significant employee configuration mapping changes.

5. Select the type of employees you want to update: **Active**, **Inactive**, or **Terminated**.

6. Click the **Get Employees** button to display a list of employees who fit the selected profile.

7. Additional selections are available in the **Advanced Options**. Make sure the options you choose are appropriate for the type of update you need.

- **Calculate Pay Rates as Hourly**. Updates employees' payroll as hourly regardless of the HR setting. For example, select this to transfer the hourly rate of a salaried employee to Payroll.

- **Overwrite Distribution Codes**. Overwrites the existing distribution codes while updating existing records in Payroll.

  > **Important!** This setting is selected by default, so distribution codes in Payroll will be overwritten with the distribution codes mapped in the employee configuration profile you selected for updating.

- **Overwrite Payroll Pay Frequencies**. Overwrites existing pay frequencies. Sage HRMS supports four pay frequencies (biweekly, monthly, semi-monthly, and weekly), while Sage 300 Payroll supports five additional pay frequencies (daily, 22 per, 13 per, 10 per, and quarterly).

  The existing pay frequency is *daily* in Sage 300 Payroll. If you select this check box, the process overwrites the existing pay frequency (daily) with the value retrieved from HR. If you clear this check box, the process does not change the existing pay frequencies in Payroll.

- Use the **Pay Frequency**, **Organization Level**, **Organization Code**, or a specific **Employee ID** range options to include or exclude additional employees from the updates.

8. Click the **Get Employees** button again to update the list of employees.

9. In the **Include Benefit** section, select the benefits to be included (or excluded) from the sync process.

10. In the employee list, include or exclude individual employees for processing by changing the values in the **Include?** column to **Yes** or **No**. You can also click **Include All** or **Exclude All** to change them all at once.

11. When you are ready to update the employee information, click **Process**.

    A summary of the employees and updates displays in the window for you to review before committing to the update.

12. After reviewing the results, click **Update** to complete the process and update Payroll.

    The update process can take several minutes. When it is complete, the items in the **Status** column change to **Updated**.

13. After updating, you are prompted to review the results report that shows what was updated and errors that occurred during the update. View and print this report as needed.

    > **Important!** If the Process Results report opens automatically, review it for errors. If any data is listed with an error, the data was not transferred in the update process.

14. To update the absence transactions in Sage HRMS, click **Transfer Time Taken**. When you click this button, the system creates time off accruals payouts.

    > **Note:** Absence transactions are created only when payroll was processed and posted.

15. When you are done, click **Finish** and then **Close**.

Changing Employee Pay Frequencies

When the employee pay frequency is changed in Sage HRMS, you must:

1. Run the "Using Sage HRMS Process" (page 49) using the Profile ID that corresponds to the new employee pay frequency.

2. Open the **Employee Payroll** page and either delete the earning code with the old pay frequency, or set that earning code's **Calculate?** field to **No** to ensure that the old earning code will not be used when calculating payroll.