Contents

About Sage Payroll Link ................................................................. 5
  Sage HRMS for Sage 300 ........................................................... 5

Compatibility with Sage Programs ........................................... 6
  Compatible versions .............................................................. 6
  Verifying Sage Payroll Link .................................................. 6

Installing Sage Payroll Link ..................................................... 7
  Downloading the Update ...................................................... 7
  Installing Sage Payroll Link .................................................. 7
  Activating Sage Payroll Link ................................................ 8
  Uninstalling Sage Payroll Link ............................................. 8

Setup and Configuration Overview ......................................... 9
  Setting Up Sage Payroll Link ................................................ 9
  Guidelines for Setting up Earnings, Deductions, and Benefits ....... 10

Setting Up Database Configuration .......................................... 11
  To Configure the Database .................................................. 11

Setting up Employer Configuration ......................................... 12
  About Employer Configuration ............................................. 12
  To Configure the Employer ................................................ 12

Setting up Employee Configuration ......................................... 14
  Create an Employee Configuration Profile ................................ 14
  Mapping Demographics ...................................................... 16
  Mapping Classes and Class Codes ....................................... 19
  Mapping Cost Center Codes ............................................... 20
  Mapping Earning Codes .................................................... 22
Contents

Mapping Deduction and Benefit Codes ........................................................... 24
Mapping Advance Codes ............................................................................... 29
Mapping Expense Reimbursement Codes ..................................................... 30
Mapping Accrual Codes ............................................................................... 32
Mapping Shift Differential Schedules ........................................................... 34

Using Sage HRMS Process ........................................................................ 36
Processing Sage HRMS Updates ................................................................. 36
Using the Scheduler .................................................................................. 38
Changing Employee Pay Frequencies .......................................................... 39
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. Ideal for businesses of any size, Sage HRMS helps you manage your company’s benefits programs with comprehensive benefits administration tools, track and prepare reports to ensure government compliance, and electronically store employee forms and certificates.

- **Sage HRMS Time Off.** A flexible management system for tracking employee absences and leave accruals. It enables you to 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 use to define specific training needs, prepare compliance reports, and ensure certifications are completed on-time. Sage HRMS Train lets you specify training requirements for new employees based on their current skill sets and automatically updates 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

Sage Payroll Link supports Sage 300 Payroll integration with Sage HRMS. The information below is intended to guide you regarding the compatibility of Sage HRMS and Sage 300 product versions with Sage Payroll Link.

Compatible versions

The following table shows the Sage Payroll Link Installation Package required for different versions of Sage 300 Payroll.

<table>
<thead>
<tr>
<th>Sage 300 Payroll</th>
<th>Sage HRMS</th>
<th>Sage Payroll Link Installation Package</th>
<th>Sage Payroll Link Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>2017</td>
<td>Sage Payroll Link for Sage 300 2019</td>
<td>7.1C</td>
</tr>
<tr>
<td>2018</td>
<td>2017</td>
<td>Sage Payroll Link for Sage 300 2018</td>
<td>7.1C</td>
</tr>
<tr>
<td>2017</td>
<td>2017</td>
<td>Sage Payroll Link for Sage 300 2017</td>
<td>7.1C</td>
</tr>
</tbody>
</table>

Sage 300 Payroll versions prior to 2017 are not compatible with the current version of Sage Payroll Link.

Verifying Sage Payroll Link

Before you install Sage Payroll Link, select the correct installation package to download from the Sage Knowledgebase as follows:

- **Sage Payroll Link for Sage 300 2019.** The application file name is *SagePayrollLink2019.exe*
- **Sage Payroll Link for Sage 300 2018.** The application file name is *SagePayrollLink2018.exe*
- **Sage Payroll Link for Sage 300 2017.** The application file name is *SagePayrollLink2017.exe*

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

**Warning!** If you upgrade your Sage 300 version, you must *uninstall* the existing Sage Payroll Link and then install the appropriate version of Sage Payroll Link.
Installing Sage Payroll Link

After you download the Sage Payroll Link installation package from the Sage Knowledgebase, follow the instructions in this section to install the program.

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 from Sage HRMS and Sage 300.
- Make sure you downloaded the correct installation package applicable to your configuration. See "Compatibility with Sage Programs" (page 6) for more information.

Downloading the Update

1. Visit the Sage Knowledgebase at https://support.na.sage.com, click Log on, and then log on to the site.
2. Use the search box to find the appropriate product download:
   - Download Sage Payroll Link 7.1C Product Update for Sage 300 2019 (Article ID 95403)
   - Download Sage Payroll Link 7.1C Product Update for Sage 300 2018 (Article ID 95401)
   - Download Sage Payroll Link 7.1C Product Update for Sage 300 2017 (Article ID 95400)
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 Sage Payroll Link

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. Run the .EXE file provided with Administrative privileges. Depending on your configuration, you may have to right-click the file and select Run as Administrator.
3. Follow the prompts in the InstallShield Wizard.
4. On 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 configure Sage 300 using a Windows peer-to-peer network, you must install this update on the server, and then repeat the steps to install the program on each workstation that will access Sage 300 and Sage Payroll Link.

### Activating Sage Payroll Link

After you install Sage Payroll Link, you must activate the module so it will appear on your Sage 300 desktop.

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

1. Log in to Sage 300 as the Admin user.
2. Go to 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 click Activate.
5. When notified that the activation is complete, click OK.
6. Verify the Sage Payroll Link folders is on your Sage 300 desktop.
   The program installation is complete and you can start configuring Sage Payroll Link.

**Next Step:** "Setup and Configuration Overview" (page 9)

### Uninstalling Sage Payroll Link

To uninstall the program, follow these steps:

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. Go to your Control Panel and select Programs or Add/Remove Programs.
   **Note:** Depending on your system, you may have to select the option to Uninstall a Program.
3. Right-click Sage Payroll Link in the list of programs 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 10) before setting them up in Sage 300.

Setting Up Sage Payroll Link

After setting up Sage HRMS and Sage 300 Payroll, follow these steps to set up Sage Payroll Link.

Depending on your needs, this process can change, but the general procedure for setting up Sage Payroll Link is as follows:

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. Open **Sage Payroll Link > Sage HRMS Setup > Database Configuration** to specify the name of the Sage HRMS database. See "Setting Up Database Configuration" (page 11).

3. Open **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 12).

4. Open **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 14).

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 36).

**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.

This way, if an employee's pay frequency changes, you can use the profile that corresponds to the employee's new pay frequency.

**Note:** You will learn more about profiles in Employee Configuration.

**Recommended Code Settings**

- Recommended Settings for Insurance Benefit Codes
- Recommended Settings for Savings Benefit Codes
Setting Up Database Configuration

Use Database Configuration to specify the Sage HRMS database before you complete the Employer Configuration or Employee Configuration.

To Configure the Database

1. Select Sage Payroll Link > Sage HRMS Setup > Database Configuration.
2. In the Sage HRMS SQL Server Name field, enter or select the machine where Sage HRMS Server is installed.
3. In the Sage HRMS Database Name field, enter the name of the following databases from where the employee information will be transferred into Payroll.
   - SageHRMS_Live for the live database
   - SageHRMS_DEU for the U.S. Payroll sample database (if using 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. Enter the SQL logon credentials in the Database User and Database Password fields.
5. Click Test Connection to ensure the database connections are successful.
6. Click Save to save the database connection information and close the window.

Next Step: "Setting up Employer Configuration" (page 12)
Setting up Employer Configuration

You must complete Database Configuration setup before you can perform the Employer Configuration.

About Employer Configuration

The Employer Configuration window is used to determine how the user-defined Organization Levels from Sage HRMS should map to Sage 300 Payroll.

Organizations in Sage HRMS

Up to five organization levels can be defined in Sage HRMS on the Setup > System > Enterprise Setup > Organization Titles (tab). When you first install Sage HRMS, the system defaults three organization levels: Division, Department, and Location. After organization levels are defined, you can set up Organization Codes (Setup > Employees > Code Tables > Organization) to define details (by codes) within each organization level.

To Configure the Employer


2. Click the appropriate tab, either U.S. Payroll or Canadian Payroll, and then select the check box for Use Interface - U.S. Payroll (or Use Interface - Canadian Payroll) to activate the connection to Sage 300 Payroll.

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

3. In the Link Payroll Company to U.S. Payroll (or Canadian Payroll) field, 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.
If you set up your organization levels in Sage HRMS using Department, Division, Employer, and Zone, you would choose to link one of the following:

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

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

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

5. Depending on your selection in step 4, the **Sage HRMS Org. to Payroll** 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" (page 14)
Setting up Employee Configuration

You must complete the "Setting Up Database Configuration" (page 11) and "Setting up Employer Configuration" (page 12) before you can perform the 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.

**About User-Defined Employment and Pay Fields**

In Sage HRMS, you can use up to four Employment and four Pay fields to map to functional fields in Sage 300 Payroll. You can use this option to define field labels and then enter employee-specific data in the fields for tracking or reporting purposes. For example, you might also want to use these fields to record 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. Open **Sage HRMS > Setup > Employees > HR Setup**.
2. On the **HR Options** tab, enter labels for the user-defined fields you want to use.
   - **User-Defined Employment** fields display on the Employee > Personal > HR Status > User Defined tab.
3. Click **Apply** to save your changes.
4. Next, go to Employees > View/Edit Employee > select an employee > Personal > HR Status > User Defined tab and then Job and Pay > Current Pay > User Defined tab.
5. Enter values for each field relevant for the employee. Click **Apply** to save your changes.

**Create an Employee Configuration Profile**

1. Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.
2. Enter the following information to create a new configuration profile:
   - **Profile ID.** Enter an identifying name or code for the profile (up to 20 alphanumeric characters). Upon entering the Profile ID, the system refreshes with data from your Sage 300 Payroll and Sage HRMS setups.

     **Tip:** 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 also recommend you set up a profile for paying bonuses.

   - **Profile Description.** Enter a description or name for the profile (up to 60 alphanumeric characters).
   - **Payroll Module.** This field automatically updates with either U.S. or Canadian Payroll based on the employer database you configured. You cannot change this field—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 payroll settings you defined in Sage 300 Payroll.

4. To map the fields between each system, double-click the cells and select 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 16)
   - "Mapping Classes and Class Codes" (page 19)
   - "Mapping Cost Center Codes" (page 20)
   - "Mapping Earning Codes" (page 22)
   - "Mapping Deduction and Benefit Codes" (page 24)
   - "Mapping Advance Codes" (page 29)
   - "Mapping Expense Reimbursement Codes" (page 30)
   - "Mapping Accrual Codes" (page 32)
   - "Mapping Shift Differential Schedules" (page 34)

6. Click **Save** after mapping all tabs and **Close** the window.
Deleting an Employee Configuration Profile

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

You cannot delete rows in the tables of data on each tab, as 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 the default None in the field.

**Next Step: "Using Sage HRMS Process" (page 36) to update your system.**

Mapping Demographics

Use this 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 that you 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.

Note the system mapping that 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 > Employees > View/Edit Employee > Demographics > Address and Phone subtab, enter the employee’s address and select the province (of residence).

**Important!** If you use the EE Reporting feature (View/Edit Employee > Demographics > Personal subtab), you must select the Employment Province (same as the residence in this...
For Canadian employees who live and work in different provinces:

1. In **Sage HRMS > Employees > View/Edit Employee > Demographics > Address and Phone** subtab, enter the employee’s address and select the province (of residence).

2. On the **Personal** page (**View/Edit Employee > Demographics > Personal** subtab), select the **EE Reporting** checkbox. The EE Groupings subtab appears.

3. On the **EE Groupings** page (**View/Edit Employee > Demographics > EE Groupings** subtab), select the **Employment Province**.

- **Status (Class/Schd tab)**
  The system maps this to the **Employee Status** field on the **Job and Pay > Current Job > Job** page 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** page in Sage HRMS.

- **Last Review Date (General tab)**
  The system maps this to the **Performance Review** field on the **Job and Pay > Current Pay > Pay and Performance** page in Sage HRMS. It uses the latest date from the table.

- **Inactive Date (General tab)**
  The system maps this to the **Change Effective** date field on the **Job and Pay > Current Job** page in Sage HRMS. If Employee Status in HRMS is **Active**, the **Inactive Date** should be blank.

- **Termination Date (General tab)**
  The system maps this to the **Change Effective** date field on the **Job and Pay > Current Job** page in Sage HRMS. If Employee Status in HRMS is other than **Terminated**, the **Inactive Date** should be blank.
Mapping Demographics

1. Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.

2. Select the Profile ID you previously created, and select 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.

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

- **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 can not be edited.
• **Work Classification Code.** Select from the following if defined in HRMS: four user-defined Employment fields, four 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 following if defined in HRMS: four user-defined Employment fields, four 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 from the options **Printed for Inactive or Terminated Status** and **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 the mapping steps for each Profile ID you set up in Employee Configuration.

### Mapping Classes and Class Codes

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

In Sage HRMS, you can set up classes and corresponding class codes to 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**

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

1. Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.

2. Select the Profile ID you previously created, and select the Class tab.

   The system updates the table with the Class codes you 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 codes in Sage HRMS.

5. Click Save.

6. Repeat the mapping steps for each Profile ID you set up in Employee Configuration.

Mapping Cost Center Codes

Use this tab on the Employee Configuration page to map Sage 300 General Ledger account segments cost center codes to employees in Sage HRMS.

Note: This tab displays only if you have Use Cost Center Override is selected on the Payroll Setup G/L Integration window and cost center override is configured for employees. See the Payroll help topic 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 page on the Employee Configuration tab 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 page on the Employee Configuration tab 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 page 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**

Consider this example for a company that 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.

**Mapping Cost Center Codes**

1. Open the **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

2. Select the Profile ID you previously created, and select the **Cost Center** tab.

   The system updates the table with the Cost Center codes you 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 codes in Sage HRMS.

5. Click **Save**.

6. Repeat the mapping steps for each Profile ID you set up in **Employee Configuration**.

**Mapping Earning Codes**

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

**Mapping Guidelines**

Listed below are the most common earning codes along with the recommended settings for each to simplify the mapping process. Before you can map earning codes between the systems, you must set up the earning codes in Payroll on the Earning/Deduction Codes setup window using these guidelines:

**Salary Pay**

- Category: Earning
- Type: Salary & Wages
- Employee Calculation Method:
  - Flat
  - Fixed
- Sage HRMS selections include:
  - Salaried
  - User-defined Employment and Pay fields

**Hourly Pay**

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

**Bonus Pay**
- Category: Earning
- Type: Salary & Wages
- Employee Calculation Method:
  - Flat
  - Fixed
- Sage HRMS selections include:
  - Bonus
  - User-defined Employment and Pay fields

**Tip:** When a bonus is updated in the Sage HRMS Process, the Ends (date) field 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.

### Mapping Earning Codes

1. Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.

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

2. Specify the following settings for each earning code set up in Sage 300 Payroll:
   - **Sage HRMS.** Double-click the cells in this column to select from earnings in Sage HRMS.
   - **Conversion Factor.** After specifying the corresponding Sage HRMS earning, 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).
   - **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 field blank and instead select a specific distribution code from Sage HRMS with the All Sage HRMS Codes Map to one Dist. Code field.

   - **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.

   After you select the earning in the Sage HRMS column, the program adds a default value (the first distribution code related to the earning in Payroll) here.
- Transfer Default Hour? Select Yes for the system to update the employee’s default hours for this earning. The update passes the **Hours/Units** from the employee record in Sage HRMS (Job and Pay > Current Pay) and posts to the **Default Hours** field for the earning on the employee record in Sage 300 Payroll (Pay tab).

4. Click **Save**.

5. Repeat the mapping steps for each Profile ID you set up in **Employee Configuration**.

### Mapping Deduction and Benefit Codes

Use the **Deduction/Benefit** tab on the Employee Configuration window 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 from the way they are set up in 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): 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.

### Mapping 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. Open the **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.

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

   The system updates the table with the deduction codes you set up in Sage 300 Payroll.
3. Specify the following settings for each deduction code set up in Sage 300 Payroll.

- **Ded/Ben Code Maps to.** Select from Benefit Type, Benefit Code, or User Defined. You can then specify the exact type or code in the Sage HRMS field to map to each Sage 300 Payroll deduction code.

- **Sage HRMS.** Double-click the cells in this column to select from the list of codes or benefit types in Sage HRMS. Your options here are dependent on the mapping setting you selected in the Ded/Ben Code Maps to field.

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

- **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.** After specifying the corresponding Sage HRMS code, the conversion factor defaults to 1.00. You can enter a number here for which the deduction rate should be multiplied (or a decimal to divide it). Typically this is used if you have multiple pay frequencies and for benefits that are set up with a base rate, then the rates can be converted here 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 each benefit and deduction code.

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

- **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 the mapping steps for each Profile ID you set up in Employee Configuration.

About Employee and Employer Calculations

If a deduction or benefit is set up in two parts, as two separate codes, in Sage 300 Payroll in order to support the Employer and Employee portions, the system allows you to 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.

For 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, the following
  settings should be used:

<table>
<thead>
<tr>
<th>Payroll Deduction Code</th>
<th>Ded/Ben Code Maps To</th>
<th>Sage HRMS</th>
<th>Calculation Type</th>
<th>Employer Portion Cal. Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>401K-ER</td>
<td>Benefit Code</td>
<td>401K Plan</td>
<td>Employee Only</td>
<td>System Calculate</td>
</tr>
<tr>
<td>401K-EE</td>
<td>Benefit Code</td>
<td>401K Plan</td>
<td>Employer Only</td>
<td>System Calculate</td>
</tr>
</tbody>
</table>

Note: Alternatively, in the above example you could specify Calculation Type = Do Not Calculate
for one Payroll code and Calculate Both for the other.

Recommended Settings for Insurance Benefit Codes

Below are the recommended settings for insurance benefit codes.

Select Sage Payroll Link > Sage HRMS Setup > Employee Configuration and click the
Deduction/Benefit tab to configure insurance benefits in payroll.

Insurance Benefit Codes Types

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

Each benefit type can be comprised of 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 in the Ded/Ben Code Maps to field 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 greater than 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, it is recommended to use a one-to-one mapping.
- For one-to-one mapping, select **Benefit Code** in the **Ded/Ben Code Maps** to field in the mapping table.

Insurance Benefit Codes

Recommended settings for Taxable Benefit

**Employer Portion**

<table>
<thead>
<tr>
<th>Category:</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Calculation Method:</td>
<td>Flat</td>
</tr>
<tr>
<td>Frequency:</td>
<td>Use the employee contribution frequency in HRMS</td>
</tr>
<tr>
<td>Post Benefit to General Ledger:</td>
<td>Checked</td>
</tr>
</tbody>
</table>

On the Employee Configuration **Deduction/Benefit** tab, select **Employer Only** for the **Calculation Type**.

**Employee Portion**

<table>
<thead>
<tr>
<th>Category:</th>
<th>Deduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Calculation Method:</td>
<td>Flat</td>
</tr>
<tr>
<td>Frequency:</td>
<td>Use the employee contribution frequency in HRMS</td>
</tr>
</tbody>
</table>

On the Employee Configuration **Deduction/Benefit** tab, select **Employee Only** for the **Calculation Type**.
Recommended Settings for Non-taxable Benefit

**Option 1.** Use 2 settings: Benefit for the employer portion and Deduction for the employee portion just like the above settings.

**Option 2.** Use 1 setting.

<table>
<thead>
<tr>
<th>Category:</th>
<th>Deduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Calculation Method:</td>
<td>Flat</td>
</tr>
<tr>
<td>Employer Calculation Method:</td>
<td>None</td>
</tr>
<tr>
<td>Frequency:</td>
<td>Use the employee contribution frequency in HRMS</td>
</tr>
</tbody>
</table>

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

### Recommended Settings for Savings Benefit Codes

Below are the recommended settings for savings benefit codes.

Select **Sage Payroll Link > Sage HRMS Setup > Employee Configuration** and click the **Deduction/Benefit** tab to configure savings benefits in payroll.

Sage HRMS allows for two types of savings contributions: **amount** and **percent**. The earning/deduction code setup will vary depending on which savings contribution type the employee has. The recommended settings for each are shown below.

**Savings Benefit Code (Amount)**

Recommended settings:

<table>
<thead>
<tr>
<th>Category:</th>
<th>Deduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Calculation Method:</td>
<td>Flat</td>
</tr>
<tr>
<td>Employer Calculation Method:</td>
<td>Flat</td>
</tr>
<tr>
<td>Frequency:</td>
<td>Use the employee contribution frequency in Sage HRMS</td>
</tr>
</tbody>
</table>

**Savings Benefit Code (Percent)**

Recommended settings:
### Deduction

<table>
<thead>
<tr>
<th>Category:</th>
<th>Deduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Calculation Method:</td>
<td>Percentage of Base</td>
</tr>
<tr>
<td>Employer Calculation Method:</td>
<td>Percentage of Base</td>
</tr>
<tr>
<td>Frequency:</td>
<td>Use the employee contribution frequency in Sage HRMS</td>
</tr>
</tbody>
</table>

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 window 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 user-defined code tables; then, each advance code can be mapped to the corresponding user-defined code in Sage HRMS.

You can map **Payroll Advance** codes to as many as four user-defined Employment fields and four user-defined Pay fields in Sage HRMS.

**Note:** You must have user-defined fields set up in Sage HRMS if you want to map Payroll codes to Sage HRMS data. [Learn more.]

### Mapping Advance Codes

1. Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.
2. Select the Profile ID you previously created, and select the Advance tab.

The system updates the table with the advance codes you set up in Sage 300 Payroll.
3. Specify the following 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 field blank and instead select a specific distribution code from Sage HRMS with the **All Sage HRMS Codes Map to one Dist. Code** field.

- **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.

  After you select the advance code in the Sage HRMS column, the program adds a default value (the first distribution code related to the earning in Payroll) here.

4. Click **Save**.

5. Repeat the mapping steps for each Profile ID you set up in **Employee Configuration**.

### Mapping Expense Reimbursement Codes

Use the **Expense Reimbursement** tab on the Employee Configuration window 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 user-defined code tables; then, each code can be mapped to the corresponding user-defined code 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:** You must have user-defined fields set up in Sage HRMS if you want to map Payroll codes to Sage HRMS data. Learn more.

**Mapping Expense Reimbursements**

1. Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.

2. Select the Profile ID you previously created, and select the Expense Reimbursement tab.

   The system updates the table with the expense reimbursement codes you 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 user-defined codes 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 code.

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

   - **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.

     After you select the user-defined code in the Sage HRMS column, the program adds a default value (the first distribution code related to the expense reimbursement in Payroll) here.

4. Click **Save**.

5. Repeat the mapping steps for each Profile ID you set up in **Employee Configuration**.
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 for use in payroll. You then use the timecards in payroll which 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 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. You define which program rules should be following in the **Accrual Calculate By** mapping field.

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

Accrual Calculate By Settings

**Sage HRMS Accrual**

If the **Accrual Calculate by** field (column) is set to **Sage HRMS Accrual**:

- Time Off absence transactions can be created in two ways with this configuration:
  1. 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.
2. 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. To avoid this, 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.

Or, you should delete any timecards generated by the Sage Payroll Link > Sage HRMS Process process that were not yet posted before transferring accruals.

Payroll
If the Accrual Calculate by field (column) is set 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, as this information is managed within Payroll.

**Important!** Updating All records could take more time based on the number of records to be updated. For this reason, a best practice is to 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.

Mapping Accrual Codes

1. Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.
2. Select the Profile ID you previously created, and select the Accrual tab.
   The system updates the table with the accrual codes you 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.
• **HRMS Attendance Plan Code.** Double-click the cells in this column to select from the list of attendance plan codes set up in Sage HRMS. This is used to get the attendance information from Time Off (such as year carryover, accrued, 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 field blank and instead select a specific distribution code from Sage HRMS with the All Sage HRMS Codes Map to one Dist. Code field.

• **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.

  After you select the HRMS Attendance Plan Code, the program adds a default value (the first distribution code related to the accrual code in Payroll) here.

• **Accrual Calculate By.** Select which accrual rules you want the system to follow when you process payroll. Select either Sage HRMS Accrual, or Payroll. Note that you must select an HRMS Attendance Plan Code and specify Sage HRMS Accrual if you want the accruals to be calculated by the plan rules set up in Sage HRMS.

4. Click **Save**.

5. Repeat the mapping steps for each Profile ID you set up in Employee Configuration.

### Mapping Shift Differential Schedules

Use the **Shift Diff Schedule** tab on the Employee Configuration window 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 applications. However, the configurations of shift differential schedules are different.

- **In Sage 300 Payroll:**
  - You can set up an unlimited number of schedules.
  - Each schedule can have up to four shifts.
  - For each shift you can specify a differential rate (an amount per hour paid in addition to the regular pay).
In Sage HRMS:

- You can set up only one schedule (specified in the Shift Differential Codes code table).
- In the schedule, you can create an unlimited number of shifts.
- For each shift, you can enter 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 four types of codes in Sage HRMS:

- HRMS Shift Differential Codes
- Four User-defined Employment fields
- Four User-defined Pay fields
- User-defined Code Table

You can specify a differential rate in both the Sage HRMS and Sage 300 Payroll. However, when you map each Sage 300 Payroll shift to an Sage HRMS shift, the differential rate defined 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 36). The differential rate assigned to the mapped shift in Payroll will be used in the employee's pay calculations instead of the shifts in Sage HRMS.

**Mapping Shift Differential Schedules**

1. **Open the Sage Payroll Link > Sage HRMS Setup > Employee Configuration.**
2. Select the Profile ID you previously created, and select the Shift Diff. Schedule tab.
   
   The system updates the table with the shift differential schedule codes you 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 Code column to select from the list of shift codes in Sage HRMS.
5. Click **Save.**
6. Repeat the mapping steps for each Profile ID you set up in Employee Configuration.
Using Sage HRMS Process

Sage HRMS Process is used in Sage Payroll Link to update employee information between Sage HRMS and Sage 300.

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

Processing Sage HRMS Updates

1. Open 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, and when the window is open, no configuration (payroll setup) windows can be opened.

2. Select the Profile ID for which you want to update employee records.

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

4. Select the information you want to update.

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

   - **Update Pay Information**: When selected, 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**: When selected, 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**: Select to update all of the above.

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

   Important! Updating All records could take more time based on the number of records to be updated. For this reason, a best practice is to update the least possible amount of records. However, **Update All** would be the best choice if you have made significant employee configuration mapping changes.
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!** The default for this setting is **selected**, 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).

     Suppose the existing pay frequency is **daily** in Payroll. If you select this check box, the system overwrites the existing pay frequency (daily) with the value retrieved from HR; otherwise, the system does not update the existing five specific pay frequencies.

   - **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, select or clear individual employees to include or exclude for processing by changing the value of the cells in the **Include?** column to **Yes** or **No**. You can also click **Include All** or **Exclude All** to change them all at once.

11. Click **Process** when you are ready to update the employee records. A summary of the employees and updates displays on 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. Once complete, the items in the **Status** column change to **Updated**.

13. After updating, you are prompted to review the results report which 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. Click **Transfer Time Taken** to update the absence transactions in Sage HRMS. When you click this
button the system creates time off accruals payouts.

**Note:** Absence transactions are created only when payroll has been processed and posted.

15. Click **Finish** and then **Close** when you are done.

## Using the Scheduler

The Scheduler enables you to schedule the Sage HRMS Process to occur at a specific date and time. This helps you update a large number of employees at once when the system is not in use. Using the Scheduler, you can schedule the process to run during off hours.

There are four steps to using the Scheduler:

### Step 1: Schedule Profile

1. Log on to the appropriate employer.
2. Select Sage Payroll Link > Sage HRMS Setup > Schedule Profile Configuration to open the **Schedule Profile Configuration** window.
   
   This window contains much of the same information as the Sage HRMS Process window so you can select the employees and benefits to be updated.
3. Add a **Schedule Configuration ID** and **Description**.
4. Set the parameters for the update you want to schedule and click **Add** to save it.
5. Click **Close**.

### Step 2: Schedule User Login

1. Select Sage Payroll Link > Sage HRMS Setup > Schedule User Login Configuration to open the **Schedule User Login Configuration** window.
2. Set the **User** and **Password** to the same username and password as the Login used to log on to Sage 300.
3. Set the **Include** field to **Yes** (double-click to change No to Yes) for each company for which you will be using the Scheduler.
4. Click **Save** and then click **Close**.

### Step 3: Run the Schedule Process Report

2. Set the appropriate criteria for the information you want on the report.
3. Click **Print** to open the report in SAP Crystal Reports so it can be saved and printed. The report shows the results after the update, including each field along with its old value, new value, status, and error description if applicable.

**Step 4: Set the Schedule**

1. On the server, open Windows Explorer and go to C:\Windows\Tasks.
2. Double-click **Add Scheduled Task** to open the **Scheduled Task Wizard**.
3. Click **Next**.
4. Click the **Browse** button and go to the folder \Program Files\Sage\Sage 300 ERP\AH71C\ and double-click **AH1200.exe**.
5. Continue through the **Task Wizard** to set your task name and its run schedule.
6. Enter the user login information. Make sure this is the same login that is used to log on to this machine. The task will then be scheduled to run as if started by this user.
7. Click **Finish** to complete the scheduled task. The new task is added to the C:\Windows\Tasks folder and will run as scheduled.

**Changing Employee Pay Frequencies**

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

1. Run the "Using Sage HRMS Process" (page 36) 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.