



# Sage Payroll Link 7.1C

## Release Notes

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# Introduction

## Release Information

**Product:** Sage Payroll Link

**Version:** 7.1C

## About This Upgrade

This document describes enhancements and modifications in Sage Payroll Link, the application designed to integrate Sage 300 Payroll and Sage HRMS.

**Note:** If you are using Sage Payroll Link for the first time, review the [Sage 300 Payroll Sage HRMS Integration Guide](#) for detailed instructions to install, set up, and configure the program for the first time.

We recommend you consult your certified business partner or Sage Professional Services Group to install the program for you. **You need all of the following to install this update:**

- The Sage Payroll Link 7.1C Installation Package, appropriate to your configuration. The installation package is available on the Sage Knowledgebase at <https://support.na.sage.com>.
- Sage 300 Payroll and Sage HRMS must be installed and set up.

**Tip:** Refer to the [Sage 300 Documentation](#) and [Sage HRMS Documentation](#) websites for instructions to set up and use each program.

## Before You Upgrade

- You must log on as a user with administrative privileges to install the update.
- Complete all payroll processing and print all payroll checks.
- Review the [compatibility guidelines](#) in this document to ensure you use the correct installation package applicable to your version of Sage 300 and Sage HRMS.

## Support and Resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Help and documentation:** Many answers to common questions can be found in the help and documentation included with and linked from within the help menu.
- **Sage City:** Visit <http://sagecity.na.sage.com/> for blogs, tips, and guidance for your Sage programs.
- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at <https://support.na.sage.com> or contact Customer Support at 800-829-0170 from the U.S. and 800-330-2607 from Canada. Please have your Customer ID ready when contacting Support.

# Sage Payroll Link

The following new features and improvements are included with this release.

## General Updates to Sage Payroll Link

### Accruals in Payroll to Update Sage HRMS Time Off

We added new functionality so you can set up and use the Accruals process in Sage 300 Payroll, and then have the details for the accrual rates, usage, and balances transfer to Sage HRMS to update the Time Off records for employees. You can select which program should control the accrual calculations on the **Employee Configuration** window with the new **Accrual Calculate by** field. To set the program you want to control accrual calculations:

1. Open **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**.
2. Select the **Profile ID** you want to update (or create a new one).
3. Click the **Accrual** tab.
4. Under the field **Accrual Calculate by** (in the table), choose from:
  - **Sage HRMS Accrual**. This option requires you to set up Time Off plans in Sage HRMS. It uses the rules, rates, and balances from the Time Off plan when you process payroll.
  - **Payroll**. This option requires you to set up Accruals in Sage 300 Payroll and uses those rules, rates, and balances. Payroll updates Sage HRMS Time Off records when you use the Sage HRMS Process to transfer time taken.

**Note:** Time off paid out in payroll will update the employee records when you click the **Transfer Time Taken** button in the Sage HRMS Process, regardless of which system is used to calculate the accruals.

5. Click **Save**.
6. Repeat steps 2 through 5 for each Profile ID you want to update.
7. Click **Close**.

When you install this product update, the system sets all Profile IDs with the **Accrual Calculate by** option **Sage HRMS Accrual**. This is the setting the program used by default prior to this release.

**Important!** If you use Sage 300 Payroll to manage your accruals, do not use the Sage HRMS **Accrue Time** process (such as the button on the **View/Edit Employee > Time Off > Attendance Summary** window) because it will overwrite your accrual balances from Payroll.

## For Customers Upgrading from Version 6.1C

This version of the application was released in the year 2012 and is the currently supported version. This was the preferred version to link Sage 300 2014 and 2016 with Sage HRMS 2015 and 2016.

### Province of Employment on the T-4 (Canada only)

Prior to this release, customers with Sage 300 Canadian Payroll and employees who have different work and residence provinces experience problems updating the correct address on T-4s. The incorrect province (residence) would update the T-4 every time the Sage HRMS Process was used to update payroll. This issue has been corrected, and now the province of employment is correctly updated on the T-4. (17002)

### New Layout for Sage HRMS Process

With this release, we changed the layout for the **Sage HRMS Process** window (**Sage Payroll Link > Sage HRMS Process > Sage HRMS Process**). We moved the **Get Employees** button to the bottom left of the window. And we moved the following options (previously displayed on the window) into a collapsible **Advanced Options** section: Calculate Pay Rates as Hourly, Overwrite Distribution Codes, Overwrite Payroll Pay Frequencies, Organization Level, Pay Frequency, Organization Code, Employee, and Include Benefits. All functionality of the options remains the same.

## For Customers Upgrading from Version 7.1A

This version of the application was briefly released in 2014.

### Demographics, Advances, and Expense Reimbursements

We added the Demographics, Advance, and Expense Reimbursement tabs to the **Employee Configuration** window ( **Sage Payroll Link > Sage HRMS Setup > Employee Configuration**) so you can now configure these settings for integration between Sage 300 Payroll and Sage HRMS. Review the **Sage Payroll Link Integration Guide** or help after you install the update for instructions to configure the new tabs.

**Tip:** Press **F1** to open context-sensitive help on any window in Sage Payroll Link.

## Transferring Job Codes

You can now use the **Sage HRMS Process** window (**Sage Payroll Link > Sage HRMS Process**) to correctly transfer the Job Code for employees. The process retrieves and shows the **Job Title** from the **Current Job** page in Sage HRMS (**View/Edit Employee > Job and Pay > Current Job**) and updates the employee's **Position** field in Sage 300 Payroll (**Sage 300 > Payroll Employee > Class/Schd tab**).

## Job Code Validation

In the prior release, some customers experienced an error when using the **Sage HRMS Process** window if the **Job Code Validation** setting in **HR Setup** was set to **No** and then job codes were manually entered on the employee record that did not match the job codes set up at the company level (Sage HRMS > Setup > Employees > Jobs > Codes). With this release, all job codes will transfer with the Sage HRMS Process whether or not they are set to be validated. This means that you don't have to use the Job Code Validation and you can manually enter any job codes on the employees' **Current Job** page (**Sage HRMS > Employees > View/Edit Employees > Current Job**), and then successfully use the Sage HRMS Process to transfer job codes to Sage 300 Payroll (**Payroll Employee > Class/Schd tab > Position field**). (16782)

## Sage HRMS Process Updates Benefits Amounts

In the prior release, using the **Sage HRMS Process** (Sage Payroll Link > Sage HRMS Process) would change some benefits amounts to zero for employees in Sage HRMS. With this release we fixed the issue, and the Sage HRMS Process can be used to update benefit amounts correctly. (16603)

## Sage HRMS Process Transfer Time Taken

Prior to this release, the **Transfer Time Taken** button on the Sage HRMS Process window (Sage 300 > Sage Payroll Link > Sage HRMS Process) was not consistently available to all customers and all configurations. With this release, the button is now available for everyone and it can be used to both update Absence Transactions in Sage HRMS as well as transfer Accrual plan information set up in Sage 300 Payroll to Sage HRMS. (16915)

**Important!** If you use Sage 300 Payroll to manage your accruals, do not use the Sage HRMS **Accrue Time** process (such as on the **View/Edit Employee > Time Off > Attendance Summary** window) because it will overwrite your accrual balances from Payroll. If you accidentally overwrite the balances, you can use the Sage HRMS Process window to restore the balances from payroll in Sage HRMS Time Off.



# Compatibility with Sage Programs

The information below is intended to guide you regarding the compatibility of Sage HRMS and Sage 300 product versions with Sage Payroll Link. You should assume that any product versions not listed here are not compatible with the current version of Sage Payroll Link.

## Compatible Versions

Note the following compatibility guidelines and supported versions:

Sage 300 Payroll	Sage HRMS	Sage Payroll Link Installation Package	Sage Payroll Link Version
2017	2016	Sage Payroll Link for Sage 300 2017	7.1C
2016	2016	Sage Payroll Link for Sage 300 2016	7.1C
Prior versions	Prior versions	Sage Payroll Link	6.1C

## Verifying Sage Payroll Link

Before you install Sage Payroll Link, you must select the correct installation package to download. The installation packages are provided on the [Sage Knowledgebase](#) as follows:

- **Sage Payroll Link for Sage 300 2017.** The application file name is *SagePayrollLink2017.exe*
- **Sage Payroll Link for Sage 300 2016.** The application file name is *SagePayrollLink2016.exe*

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 in your Control Panel > Programs and Features.

# Installing Sage Payroll Link

Follow these instructions to download and install the product update.

## Before you start

- Verify that Sage HRMS and Sage 300 Payroll have been installed, setup, 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 have 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. In the **Support by product** section, click **Select your product**, and then click **more products...**
3. Under **Sage HRMS**, click your Sage HRMS product and version.
4. In the **Latest products** section, and based on your version of Sage 300 Payroll in accordance with the [Compatibility Guidelines](#), click one of the following articles to open it:
  - **Download Sage Payroll Link 7.1C for Sage 300 2017**, or
  - **Download Sage Payroll Link 7.1C for Sage 300 2016**
5. 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 on 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**.

## Activating Sage Payroll Link

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

**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. Click **OK** when notified that the activation is complete.
6. Verify the Sage Payroll Link folders are available on your Sage HRMS desktop.
7. The program installation is complete and you can start configuring Sage Payroll Link.