



Sage HRMS 2017

Getting Started Guide

May 2017

This is a publication of Sage Software, Inc.

© 2017 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.

Last updated: April 19, 2017

Contents

- Chapter 1: Introduction 5**
 - Support and resources 5

- Chapter 2: Starting Your System 6**
 - Starting Sage HRMS 6
 - Log on to Sage HRMS 6
 - Use the Initialization File 7
 - Rebuild System Files 8

- Navigating Sage HRMS 9**
 - Accessing Tasks and Processes in Sage HRMS 9
 - Using the Navigation Pane 9
 - Using the Main Menu 10
 - Moving Around in a Page 10
 - Shortcut Keys 14
 - Find an Employee 16
 - Using Advanced Find 18
 - Using the Organizer and Scheduler 20

- Chapter 4: Setup Checklists 32**
 - Sage HRMS Setup Checklist 32
 - Time Off Setup Checklist 33

- Chapter 5: Setting Up Sage HRMS 35**
 - Set Up User Preferences 35

- Chapter 6: Setting Up the Enterprise 38**
 - About the Enterprise Setup 38
 - Setting Up the Enterprise 39

Chapter 7: Setting Up Employers	45
Adding an Employer	45
Modify an Employer	46
Delete an Employer	47
Chapter 8: Setting Up Code Tables	48
About Code Tables	48
Setting Up Code Tables	49
Chapter 8: Setting Up Security	53
Set Up Page Security	53
Set Up Security	53
Set Group Security	55
Set up User Security	58
Set Field Level Security	61
Set Product Group Filters	63
Set Ad Hoc Reporting Security	65
Ad Hoc Reporting Security Level	67

Chapter 1: Introduction

This guide provides an overview for setting up and using 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 Sage HRMS and on the [Sage HRMS product documentation website](#).
- **Customer Support.** For additional articles and resources, visit <https://support.na.sage.com> or contact Customer Support at 800-829-0170. Please have your Sage Customer Number handy when contacting Customer Support.
- **Sage City.** Visit <http://sagecity.na.sage.com> for help, guidance, documents, and downloads specific to Sage HRMS and modules.
- **Tax forms.** Because all printed forms have variations, Sage HRMS Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at www.SageChecks.com.

Chapter 2: Starting Your System

Starting Sage HRMS

After you install the system, you are ready to start Sage HRMS and begin to learn about and use the system's features.

To Start Sage HRMS

1. From the Start menu, select **All Programs > Sage > Sage HRMS Client > Sage HRMS Client**.
2. The Logon page opens. You can log on in two different ways:
 - To log on as **MASTER**, clear the Windows Logon check box and enter the logon for the MASTER user.
 - To log on with Windows Authentication, select the Windows Logon check box and enter your Windows account username and password. Be sure to include the domain in the Username field (for example, **FLSAGE\lizz**, where FLSAGE is the domain and lizz is the username).
3. Select to [use sample or live data](#). If you also installed Sage HRMS Link, you can log on to Sage HRMS Link right from the logon page.
4. Click **Logon** to open the application.

Log on to Sage HRMS

When you log on to Sage HRMS, you can select sample data or live data. The sample data includes employees and scheduled tasks in the Organizer, which mimic how an actual company may use Sage HRMS. If you are new to Sage HRMS, the sample data allows you to familiarize yourself with entering data and using features without adversely affecting your company's production (or live) data.

Note: If you are a Canadian employer and you want to use sample data, select **Both** from the **Enterprise Options** tab of the Enterprise Setup page and add a Canadian employer.

Logging On

Press **Ctrl + U** on the Logon page if you want to update system files before logging on to Sage HRMS.

When logging on to Sage HRMS, you must log on with your Windows authentication or enter a username and password to access either database.

Log On Using Sample Data

Sage HRMS provides a default username for logging on to sample data.

1. Select **Use Windows Logon** to log on with your Windows authentication. Otherwise, enter **MASTER** in the **Username** field.
2. Leave the **Password** field blank.
3. Select **Sample Data**.
4. Click **Logon**.

Live data is your company's production database, which contains employee information and other company data. Sage HRMS provides a default username and password for you to log on for the first time. After logging on, change the logon credentials and set up security according to your company's requirements.

Log On Using Live Data

1. Select **Use Windows Logon** to log on with your Windows authentication. Otherwise, enter your username in the **Username** field. If you are logging on for the first time, enter **MASTER**.
2. Enter your password in the **Password** field. If you are logging on for the first time, leave the field blank.
3. Click **Live Data**.
4. Click **Logon**.

After logging on to Sage HRMS, you can switch between live and sample data anytime. This is useful if you want to see how a feature or process works in the sample data before implementing it in your live data. To switch between live and sample data, select **the username menu > Log Off** at the top of Sage HRMS.

Use the Initialization File

Sage HRMS provides the Sage HRMS initialization (ABRAWIN.INI) file to customize your environment according to your needs. This feature provides additional capabilities for using Sage HRMS on Local Area Networks (LANs).

After installing Sage HRMS, you can use the ABRAWIN.INI file to specify any directory for the following items: live data, sample data, temp file directory, and export directory.

Photos (.jpg, .gif, or .bmp files) displayed on the Demographics page are, by default, stored in **...\\Sage\SageAbraSQLHRMSServer\Data\Photos**. You can also use the ABRAWIN.INI file to provide a different storage location by entering the appropriate path.

If you are using a LAN, you can keep the Sage HRMS programs (executable files) on your local PC for fast access and then obtain information from a common server. By using the ABRAWIN.INI file, you can assign the required paths to locate the information.

Rebuild System Files

When you first install Sage HRMS or start Sage HRMS, the system automatically initializes your system and rebuilds your system files for you. This ensures you can access the features that you are registered to use.

There might be times, such as with a power failure, when you need to rebuild your system files to ensure you can access your installed options.

Note: Press **Ctrl + U** on the Logon page if you want to rebuild system files before logging on to Sage HRMS .

To Rebuild System Files

1. Select **Setup > System > Maintenance > Rebuild System Files**.
2. Click **Yes**. The process begins and requires no other action on your part.

When the process is complete, you are returned to the logon page.

Navigating Sage HRMS

Accessing Tasks and Processes in Sage HRMS

Sage HRMS provides different ways to access the tasks, processes, and features you need to manage your human resources.

The Navigation Pane

Use the navigation pane at the left of Sage HRMS to navigate tasks and processes for each function.

The Main Menu

The main menu is hidden by default. If you choose to display the main menu, it appears at the top of the page and provides menus for each action.



Using the Navigation Pane

The navigation pane is the menu on the left side of your Sage HRMS desktop. It provides quick and easy access to tasks and processes in the program.

Note: Groups, tasks, and processes to which you do not have security access do not display on the navigation pane.

Hierarchy in the Navigation Pane

There is a hierarchy in the navigation pane, you will need to select them in the following order.

1. Group - For example, Employees, Time Off, Training, Reports
2. Subgroup - You don't have to click on a subgroup to access the corresponding tasks, but you can expand or collapse a list of tasks in a subgroup by pressing  or .
3. Menu item in the subgroup.

Using the Main Menu

This legacy menu at the top of Sage HRMS provides access to all items in the Actions, Processes, Analysis, Reports, Rules, Details, and Query menus. When you select an item from these menus, a list opens that contains all the products installed on your system. Some menus include a System selection which includes activities relating to the entire system rather than an individual feature.

To Display or Hide the Main Menu

When you start Sage HRMS, the main menu is hidden. To show or hide the legacy main menu, each user must:

1. Select **Settings** (⚙️) > **User Preferences**. The User Preferences window opens.
2. Select the check box **Display Main Menu** to show the main menu, or clear the check box to hide the main menu.
3. Click **OK**.
4. Click **Yes** when prompted to [rebuild your system files](#).

Note: Tasks or processes for which you do not have security access do not appear on menus or on the navigation pane.

Moving Around in a Page

A page contains several fields into which you enter data or select data from a list. When you work inside a page, you move from field to field to enter information. When you highlight the field, you can enter information into it. The following table lists some ways to move around in a page.

Use This	To Perform This Task
Tab	Move forward from field to field (left to right and top to bottom).
Shift + Tab	Move from previous field to field (right to left and bottom to top).
↓↑→←	Move the selection cursor from field to field or within a field.
Mouse	Place the selection cursor in a field or within a text box.

Use Tabs

Many pages contain two or more tabs. Each tab contains different fields. For example, the Demographics page contains three tabs:

- **Address and Phone** - Contains the employee's address and phone number.
- **Personal** - Contains the employee's personal information.
- **Photo** - Contains the employee's photograph.

To move to another tab, click on the tab label. For example, click the **Personal** tab label to view the Personal page. You can also press the **Right Arrow** → key on your keyboard to move to the next tab or the **Left Arrow** ← key to move to the previous tab.

Select From a Drop-Down List Box

To fill in a field, select from a drop-down list box. A drop-down list box lets you select one item from a list of several items. The following figures show examples of a closed and open drop-down list.

Closed



Open



The following table describes how to open and select items from a drop-down list box. Make sure you highlight the field on which you want to work before you perform the following tasks:

To Do This	Do This
Open the list using your keyboard	Press the spacebar .
Open the list using your mouse	Click the arrow.
Close the list using your keyboard	Press the spacebar .
Close the list using your mouse	Select an item or click outside the list.
Select an item using your keyboard	From either an open or closed list, type the first

To Do This	Do This
	letter of the item, or press ↑ or ↓ to find the item.
Select an item using your mouse	From an open list, click the item.

Enter Text in a Text Box

Entering information in a text box is another way to fill in a field. Each text box limits the number of characters or digits you can enter. The Data Dictionary contains the limit for each database field. The following figures show empty and filled text boxes.

Empty

Salutation

Filled

Salutation

Note: If you are using the add-on import/export application, Sage HRMS Link, to export your data to ADP PC/Exchange, be aware that some fields can accommodate more characters than ADP can accommodate. For a description of these fields, refer to your Sage HRMS Link manual.

The following table describes the different functions you can perform inside a text box.

To Do This	Do This
Enter information in a blank field	Type characters and digits up to the field maximum.
Replace information in a field	Click and drag the mouse over the field to highlight; then type characters and digits up to the field maximum.
Delete all characters in a field	Click and drag the mouse over the field to highlight and click Delete .
Delete one	Place the cursor to the left

To Do This	Do This
character in a field	of the character to delete and click Delete .
Insert one character in a field	Place the cursor to the right of the insertion point and type.

To Enter a Date in a Text Box

Entering a date in a text box is a bit different from entering text in a text box. A date always contains the month, day, and year. Therefore, the dashes between the month and day are permanently included in the text box. An example of a date text box appears below.

Birth Date

- To type a date into a text box, highlight the field. Then, type two digits for the month, two digits for the day, and four digits for the year. For example, we typed "01111953" for the figure above.
- As an alternative to typing the date, you can click the right mouse button. A calendar control opens enabling you to select a date from the calendar display. The calendar opens displaying the current date circled in red. Click a date to select it and close the calendar. Selected dates are highlighted in gray.
- Clicking the arrows in the top left or top right of the calendar displays the previous or next month. Click on the month to display a pop-up menu that lists all months within the year. Select a month from the list.
- Click on the year to display arrows which enable you to move the year up or down. Return to the current day by clicking **Today** at the bottom of the calendar.
- Click **OK** to close the calendar. The date you selected appears in the text box.

To change an existing date, right-click the field to open the calendar, or highlight the date and do one of the following:


- Type the new date
- Click **+** or **-** to increase or decrease the date

Close and Resize pages

To close a page, click the **Close** button **X** located in the top right-hand corner of the page title bar. If you have made changes, the system will ask whether you want to save your changes. **Yes** saves the changes and close the page; **No** closes the page without saving the changes.

To enlarge a page, click the **Maximize** button located in the top right-hand corner of the title bar. If the page is already enlarged, you can reduce its size by clicking the **Restore** button.

Access Context-Sensitive Help

You can access Help for each page by clicking the **Help** button  on any window. This provides information about the window with which you are working.

Shortcut Keys

Sage HRMS is designed to be used with a mouse pointing device. By using the mouse, it is easier to point to and select fields and buttons on the page. However, in some situations, you might find it easier to use your keyboard. Sage HRMS adheres to the Microsoft Windows standard for mouse-equivalent keystrokes.

Accessing the Main Menu

Instead of using the mouse, you can use the keyboard to access and select items from the main menu. For instance, instead of clicking on **Analysis**, you can hold down **Alt** and press **L**. To access **Processes**, hold down **Alt** and press **R**. The underlined letter in each menu category indicates the letter to press to select the menu category.

Note: The main menu is hidden when you start Sage HRMS. See [Using the Main Menu](#) for instructions to show the menu.

Press This	To Select this Menu Item
Alt + F	File
Alt + E	Edit
Alt + I	Actions
Alt + R	Processes
Alt + L	Analysis
Alt + R	Reports
Alt + U	Rules
Alt + D	Details
Alt + Q	Query

Press This	To Select this Menu Item
Alt + H	Help

After you have selected a main menu item, you can use the keyboard to do one of the following:

- Press ↓ to navigate to the other options for the selected menu item.
- Press → to highlight the next menu category.
- Press one of the underlined letters to display the corresponding drop-down menu.
- Press **Enter** to open the selected menu item.
- Press **Esc** to cancel your task and return to the task on which you were working.

Note: Certain hot keys may change when you access certain pages in Sage HRMS. If there is more than one item with the same hot key, you can press the hot key again to toggle between them. Press ↓ to access the options for the selected menu item.

Using the Tab Key

Use the **Tab** key to move from one field to another within a page or dialog box. For example, as you complete the Add New Hire task, the Add New Employee page enables you to enter a first, middle, and last name for the new employee. After you enter the first name, press **Tab** to move to the middle name field. You can also press and hold down **Shift** and press **Tab** to move up or backwards one field.

This feature is particularly useful when you are working on a page which contains many fields. You can keep your hands on the keyboard while you navigate around the fields in the page using the **Tab** key.

Using the Edit and Search Keys

You can use the standard Windows edit features to cut, copy, paste selected text.

Note: Press **Ctrl + U** on the Logon page if you want to update system files before logging on to Sage HRMS.

Press This	To Open this Function
Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + F	Employee Find

Keyboard Shortcuts

You can use the keyboard shortcuts to open pages and move from one page to another.

Note: The list of shortcut keys might be different for a customized system or if you do not have access to every page.

Press This	To Open this Page
F1	Context Sensitive Help
Ctrl + R	Absence Transactions
Ctrl + E	Attendance Summary
Ctrl + J	Current Job
Ctrl + P	Current Pay
Ctrl + D	Demographics
Ctrl + B	Dependents and Beneficiaries
Ctrl + H	HR Status
Ctrl + I	Insurance Benefits
Ctrl + O	Job History
Ctrl + L	Leave of Absence
Ctrl + S	Savings Benefits
Ctrl + T	Termination
Ctrl + U	Custom Details
Ctrl + M	Employee Activity
Ctrl + 4	Employee Payroll
Ctrl + Y	Transaction History

Find an Employee

The Employee Find enables you to search for an employee by status, last and first name, ID and social security number.

You must select an employee before you can view details and perform tasks.

Fields on the Employee Find

The following fields are available on the Employee Find:

Search Field	Definition
Last Name	Enter a value to search by the last name. When searching by Last Name and First Name, the Last Name field acts as a "go to" feature navigating you to the matching name on the list.
First Name	Enter a value to search by the first name. When searching by Last Name and First Name, the First Name field acts as filter, narrowing down your search to the employees with that value you enter in the field.
ID	Enter a value to search by the employee ID.
SSN	Enter a value to search by the Social Security Number.
Active	Select this option to include active employees.
Terminated	Select this option to include terminated employees.
LOA	Select this option to include employees on leave of absence.
Other	Select this option to include other statuses like COBRA dependents, or non-employees.

Find an Employee

1. Select **Employees > View/Edit Employee**. The Employee Find page will display.

Tip: To open the Employee Find page, you can also use the shortcut key combination **CTRL+F**.

2. Select the statuses you want to work with (**Active**, **Terminated**, **LOA**, or **Other**). Disable the ones you don't want to include in the search. The number of **Records Found** will be based on status.
3. Enter the search criteria in the fields. As you type the values in the field, the system will highlight the matching record, or closest matching record in the search results.

Note: If you enter a value and the system does not find a match, "Not Found" displays next to the search field.

4. After you have found the employee you are searching for, you can double click the employee name, or click **OK**. The employee detail page will display for the selected employee.

Navigating through a list of Employees

You can navigate through the list of employees from your initial search by using the arrows under the employee's name.

Using Advanced Find

The Advanced Find is accessed by selecting **More Options** on the Employee Find page. With the Advanced Find you can further narrow your search by entering additional criteria about organization levels, supervisor, employee type, as well as other fields.

When using Advanced Find, the search results expand to display the additional criteria fields.

Note: Collapsing the Advanced Find saves the search criteria for the next time you open the Advanced Find. However, when it is collapsed, the Advanced Find search criteria does not affect the navigation.

Fields on the Advanced Find

The following fields are available.

Search Field	Definition
Organization Levels (1-5)	Search by organization levels that you have specified in Enterprise Setup. If All is selected, all records are considered in the search results. If None Specified is selected, only employees without values in the corresponding fields are considered in the search results. If an Organization Level Title does not exist, the label will display as None.
Supervisor	Search by a list of primary supervisors. If All is selected, all records are considered in the search results. If None Specified is selected, only employees without a primary supervisor are considered in the search results. If an employer is selected in the Employer Filter, only supervisors for the selected employer are available. If the Enterprise is selected, all supervisors in the system are available.
Employee Type	Search by the employee type. If All is selected, all records are considered in the search results.
Salaried/Hourly	Search by the employee's salary or hourly status. If All is selected, all records are considered in the search results.
Job Title	Search by job title by the following methods: Choose Contains and enter a specific search string. All employees whose

Search Field	Definition
	job title contains the search string are found. Choose Exact and select a specific job title from the drop-down list.
State	Search by state.
Last Hire Date	Search by last hire date. Enter a "From" and "To" Date to search by. If From and To dates are entered, the search results display all employees with the matching criteria. You have the option to search only with a From or only with a To date.

Using the Advanced Find

1. Select **Employees > View/Edit Employee**. The Employee Find page displays.
2. Select **More Options**.
3. Enter criteria in the fields to narrow your search. Results will display in the list with the closest matching record.

Using the Organizer and Scheduler

About the Organizer and Scheduler

The Organizer shows you tasks and information items scheduled for you. The Organizer includes the Scheduler, which allows you to plan tasks for yourself or someone else.

Select **Connected Services > Sage HRMS Tools > Organizer** to open the Organizer.

Note: Select Organizer in the **Default View** field in [User Preferences](#) if you want the Organizer to open in the workspace after you log on to Sage HRMS.

Using the Organizer

The Organizer you see when you use Sage HRMS is your own personal Organizer; all scheduled tasks and information items are yours.

The Organizer first opens to the current date and provides three lists: tasks, information, and system events. It displays all tasks, messages, and events scheduled for the current date.

Using the Organizer lists, you can schedule and carry out tasks. You can also record information and plan system events. All uncompleted activities and information are rolled over from day to day.

Move Around in the Organizer

Use any of the following methods to move around the calendar:

- To jump to the current date, click the **Date** button on the Organizer toolbar.
- To move to a different day in the current month, click the day in the calendar.
- To move to a different month, right-click the month. A list drops down from which you can select a new month.
- You can also move to the previous month by clicking the first date in the calendar or any date belonging to the previous month, or move to the next month by clicking the last date in the calendar or any date belonging to the next month.
- To move to another year, right-click the year. A list drops down from which you can select a different year.

You can also use the keyboard to move to a different date, as described in the following table.

To	Press This
Move to the previous day.	←
Move to the next day.	→
Move to the previous week.	↑
Move to the next week.	↓
Move to the beginning of the month.	Home
Move to the end of the month.	End
Move to the previous month.	Page Up
Move to the next month.	Page Down

Use the Organizer Toolbar

The Organizer toolbar, located just above the Organizer, enables you to start tasks, jump to today's date, schedule items, delete or edit items in the lists, and update the Organizer.

The Organizer toolbar contains six buttons.

Button	Description
Execute a Task	<p>Use this button to complete a specific task in the Task list. To start a task, click the task description and click the Start button.</p> <div style="border: 1px solid green; padding: 5px;"> <p>Tip: Instead of using the Start button, you can also double-click the task to start it.</p> </div> <p>Depending on what the task is, the first scheduled step in the task appears. For example, if you scheduled the Add New Hire task as your task and you start the task, the Add New Employee dialog box opens for you to enter the name of the new employee. This is the first step for recording a new hire.</p> <p>The only type of item you can start is a task. However, you can edit or delete all types of items, including tasks, information items, and system events.</p>
Jump to Today	The Date button enables you to quickly jump to the current date.

Button	Description
Add Item to Scheduler	The Scheduler lets you schedule a new task, information item or system event. To access the Scheduler, click the Scheduler button.
Delete Item in Scheduler	The Delete button deletes a task, information item or system event. As a precaution, the system asks you to confirm the deletion. To delete an item, highlight it and click the Delete button. A system event can only be deleted by the user for whom it is scheduled.
Edit Item in Scheduler	The Edit button enables you to change information for a specific item. To edit an item, highlight it and click the Edit button. The Scheduler opens for you to edit the item's information. A system event can only be edited by the user for whom it is scheduled.
Refresh Organizer	The system frequently refreshes your Organizer and brings it up to date with items other users might have scheduled for you. Additionally, you can click the Update button any time you want to refresh your Organizer.

Use the Organizer Lists

Consider these your "to-do" lists. You use the Scheduler to place items on these lists. At a glance, you can browse through all tasks, information items and system events that were placed on your Organizer for the selected day.

Items on the list are either completed or uncompleted. All uncompleted tasks and information items scheduled for dates prior to the current day are rolled over when you log on to the system.

There are three lists in the Organizer

Use the Task List

A task is an Action, Process, Report, Analysis, Rule, or Detail. When you schedule a task, it appears on your Organizer or another user's Organizer if you scheduled it for someone else.

The Task list shows all tasks scheduled for you. At the time you complete the scheduled task, the **Completed** field is automatically selected, indicating the task has been completed.

The following table describes how to work with the Task list.

To	Do This
Start a Task	Click the task and click the Execute a Task button. -or- Double-click the task.
Edit a Task	Click the task and click the Edit Item in Scheduler button. -or- Click the + button next to the task. The Scheduler appears. Change the necessary information.
Delete a Task	Click the task and click the Delete Item in Scheduler button. Confirm the deletion. -or- Click the + button next to the task. The Scheduler appears. Click Delete . Confirm the deletion.
Display the task's Note page	Right-click the task. The Notes page opens. Edit the information as necessary. Click OK to save your changes and return to the Organizer. You can also edit Notes in the Scheduler.
See tasks that extend beyond the list	Use the vertical and horizontal scroll bars.
Change status to Completed	Select the Completed check box. -or- Click the task and click the Edit button to open the Scheduler. Select the This Item is Complete check box. -or- The system detects when the item is complete and automatically selects the Completed check box.
Change status to not completed	Clear the Completed check box. -or- Click the task and click the Edit button to open the Scheduler. Clear the This Item is Complete check box. You can only clear a Completed check box for

To	Do This
	tasks completed on the current day. When viewing past dates, you cannot change the status to not completed.

Use the Information List

Use the Information list to schedule any type of information. You can use this as a personal to-do list to remind yourself of anything from scheduling a meeting to making hotel reservations for your next business trip.

Like the Task list, the **Completed** field indicates the completion status. However, an information item is not an Action, Process, Analysis, Report, Rule, or Detail, so your system cannot detect whether or not it is complete. You must change an information item's status.

The following table describes how to work with the Information list.

To	Do This
Edit an Information Item	Click the information item and click the Edit Item in Scheduler button to open the Scheduler. -or- Click the + button next to the item to open the Scheduler. Change the necessary information.
Delete an Information Item	Click the information item and click the Delete Item in Scheduler button. Confirm the deletion. -or- Click the + button next to the item. The Scheduler appears. Click Delete . Confirm the deletion.
Display the item's Note page	Right-click the Information item. The Notes page opens. Edit the information as necessary. Click OK to save your changes and return to the Organizer. You can also edit Notes in the Scheduler.
See items that extend beyond the list	Use the vertical and horizontal scroll bars.
Change status to Completed	Select the Completed check box. -or- Click the information item and click the Edit button to open the Scheduler. Select the This Item is Complete check box.

To	Do This
Change status to not completed	Clear the Completed check box. -or- Click the information item and click the Edit button to open the Scheduler. Clear the This Item is Complete check box.

Use the System Event List

If you need to schedule a task that pertains to the entire system, you can schedule a system event. You can schedule any task to be a system event, that is, any Action, Process, Analysis, Report, Rule, or Detail.

You can also schedule an information item as a system event if you like. For example, you can remind everyone to back up their databases every Friday.

The following table describes how to work with the System Event list.

To	Do This
Edit a system event	Click the system event and click the Edit Item in Scheduler button to open the Scheduler. -or- Click the + button next to the event to open the Scheduler. Change the necessary information. Only the user for whom the system event is scheduled can edit it.
Delete a system event	Click the system event field and click the Delete Item in Scheduler button. Confirm the deletion. -or- Click the + button next to the event. The Scheduler appears. Click Delete . Confirm the deletion. Only the user for whom the system event is scheduled can edit it.
Display the system event's Note page	Right-click the system event. The Notes page opens. Edit the information as necessary. Click OK to save your changes and return to the Organizer.
See items that extend beyond the list	Use the vertical and horizontal scroll bars.

Use the Scheduler

The Scheduler lets you schedule tasks, information or system events for yourself or someone else. When you schedule these items, they appear in either the Task, Information, or System Event list on the Organizer.

Note: Tasks can only be scheduled for users who have access to the tasks. For example, you might want to schedule your coworker, Liz, to delete several employees from the database. However, Liz does not have security access to the Delete Employee Record task. Therefore, you cannot schedule this task for her.

The Organizer first displays the lists according to the item's priority you designate when you schedule the item. Items with the highest priority appear at the top of the list while items with the lowest priority appear at the bottom. The Organizer then sorts the items in the order in which they were scheduled.

An item appears on your Organizer until it is completed or deleted.

Available Tasks

To Schedule an Item

With the Organizer open, click the **Add Item to Scheduler** button on the toolbar to open the Scheduler.

Schedule a Task or Information Item

Click the appropriate radio button, either **Task** or **Information**, for the type of item you are scheduling.

When you select Information, the **Activity** and **Product** fields are disabled because they do not apply to information items.

Select the Task's Activity

This field specifies the activity containing the task. For example, if you schedule the Mass Update task, select **Process**. Or if you are scheduling the Rehire Employee task, select **Action**. These two tasks, Mass Update and Rehire Employee, are a process and an action, respectively.

Select the Task's Product

All Sage HRMS products appear in this list, as well as System. System includes activities pertaining to your entire system rather than an individual product.

Select the Task

This field contains the task you are scheduling. The list contains all the tasks included in the selected task's activity and product. The list changes when the task's activity and product change.

If you are scheduling an information item, the **Task** field is disabled.

Select the Sub-Task

Some tasks have associated sub-tasks. A sub-task is simply another level of task within the task you select. If sub-tasks do not apply to your selected task, the field is disabled.

Select the Employer

For most tasks, you are required to select an employer. For example, if you are working with Sage HRMS and select the Record Performance Review task, you must select which employer contains the employee for whom you want to record a performance review.

The **Employer** field is disabled if there is only one employer set up in your enterprise or if the task is an Information item.

Select a Subject

Tasks require specific information before they are processed. For example, the Rehire Employee task requires an employee's name. The items in the list change according to the task you select. If you forget to select a subject, the system warns you when you click **OK** to close the Scheduler.

If you are scheduling an information item, the **Subject** field is disabled.

Enter a Description

This is a short description of the task, information item or system event. The description appears on the Organizer of the user for whom the item is scheduled. If you are scheduling a task, the system fills in the description automatically by combining the task (or sub-task, if one is selected) and the subject.

You can change the **Description** field as necessary, but you cannot leave it blank. If you accidentally leave the **Description** field blank, the system fills it in for you.

Add a Note

The Notes text area of the Scheduler enables you to fully describe the item. You can enter an unlimited number of characters. Use the scroll bars as necessary.

When you work with the Organizer and want to see the note associated with a task, information item or system event, right-click the item to read and edit the note.

Schedule the Date To Be Done

This is the date on which the item is scheduled for completion. The item appears on the Organizer on this date. Sage HRMS automatically schedules the item for the day currently selected in the calendar, but you change the date.

Enter the **To Be Done** date in mm/dd/yyyy format. For example, enter March 27, 2017 as 03272017 (dashes are preformatted).

The **Scheduled** date is the date on which the item is being scheduled. It defaults to the current date and cannot be changed.

Automatic Advancement of Uncompleted Items

If tasks or information items are not completed on the scheduled dates, the system automatically rolls them over to the next time the user logs into the system. For example, a task on Lynn's Organizer should be completed on the 18th, but Lynn cannot complete the task on the 18th. She doesn't use her system again until the 23rd. The task rolls over to the 23rd and stays on her Organizer until she either completes or deletes the task.

Note: Unlike tasks and information items, system events are not moved forward.

Select the User for Whom the Item is Scheduled

The Scheduled For list contains users who are assigned user IDs and passwords when security was set up for your system. If you are scheduling a task, only the users who have security rights to perform that task appear in the list. For more information, see Setting Up Security.

Note: The name of the user who is scheduling the item is shown in the **Scheduled By** field and cannot be changed. This is the user who logged onto the system.

Set the Priority

You can choose from five levels of item priority: very high, high, medium, low, and very low. This indicates the importance of the item you are scheduling. The selected priority determines the order in the Organizer's tasks and information lists.

Set the Frequency

The Frequency indicates how many times the item should occur. The list includes **Once**, **Daily**, **Weekly**, **Bi-Weekly**, **Monthly**, **Bi-Monthly**, **Quarterly**, and **Yearly**. If you want the task to repeat, select any frequency other than **Once**.

For example, you might want to archive terminated employees once a month. In this case, select **Monthly** as the frequency.

When you select a frequency, the Repeating Task dialog box automatically opens for you to describe the task's repeat frequency.

The text entered in the **Scheduler's Description** text area appears in the **Task Information** field. The **Scheduled Date** and **Repeat Frequency** carry over from the Scheduler. These three fields cannot be changed.

Repeat Items

The **Repeat This Item** field lets you specify the number of times to repeat this item. Except for a **Repeat Frequency** of **Daily**, you can repeat an item as many times as required up to a five year limit. For a daily repeat frequency, you can repeat an item up to 365 times.

The **Repeat Frequency** is the number of times an item will appear on the Organizer in addition to the first date you schedule. For example, if you schedule an item to be done on Tuesday, 4/12, and the repeat frequency is weekly and the number of times you want to repeat the item is three, then your Organizer shows the item on 4/12 (the first occurrence), 4/19, 4/26, and 5/3.

Use the arrows to select the repeat number or type a number in the text box. However, if you type a number exceeding the Repeat Frequency limit, the number automatically changes to the allowable limit. For example, if you type 6 for the number of years an item is to occur, the number automatically changes to 5, the allowable limit.

Tip: Each time you schedule an item to be repeated, the repeat occurrence of the item is a separately scheduled item. If you edit a repeat item, the **Frequency** field on the Scheduler is disabled. If you find you need to change the repeat frequency of an item that is already scheduled to repeat, do not edit the item. Rather, schedule a new item and its related repeat frequency. Then, delete the old item.

Maintain the Day of the Week

You can choose to maintain the day of the week the item repeats. For example, if you always want to repeat the item on a Thursday, select the check box and select Thursday from the drop-down list.

If maintaining the day of the week does not matter, clear the check box. The item then repeats on the same numerical date of the month. For example, if you schedule an item on April 15 and you want it repeated every month, the next occurrences will be May 15, June 15, July 15, and so on, regardless of the day of the week.

If the box is selected, the **Move to Closest Date**, **Forward to Next Available Date**, and **Backward to Last Available Date** options become enabled.

Note: The **Maintain Day of Week** check box and drop-down list are disabled when your **Repeat Frequency** is daily, weekly, or biweekly, because they do not apply. In turn, the related radio buttons are disabled.

Move to Closest Date

This selection instructs the Scheduler to repeat the task on the date falling closest to the next date to repeat the task while at the same time maintaining the day of the week. This selection lets the Scheduler choose the next date to repeat the task. It either chooses a date previous to or following the scheduled repeat date. **Move to Closest Date** is the default value.

For example, suppose you want to repeat an item monthly and always want it to be done on Wednesday. Schedule the first task for Wednesday, 11/17. In December, the 17th falls on a Friday. The **Move to Closest Date** selection tells the Scheduler to move this task to Wednesday, 12/15 because it is only two days from the 17th, whereas the 22nd, also a Wednesday, is five days from the 17th.

Forward to Next Available Date

This selection instructs the Scheduler to repeat the task on whatever the date is that matches the specified day of the week and follows the date on which the task is to be repeated. Unlike **Move to Closest Date** or **Backward to Last Available Date**, the Scheduler must move forward to select the repeat task date.

Using the same example as above, you want to repeat an item monthly and always want it to be done on Wednesday. You scheduled the first task to be done Wednesday, 11/17. In December, the 17th falls on a Friday. The **Forward to Next Available Date** selection tells the Scheduler to move this task to Wednesday, 12/22, because it must move forward to the 22nd, not backward to the 15th.

Backward to Last Available Date

This selection instructs the Scheduler to repeat the task on whatever the date is that matches the specified day of the week and precedes the date to repeat the task. Unlike **Move to Closest Date** and **Forward to Next Available Date**, the Scheduler must move backward to select the repeat task date.

Using the same example as above, you want to repeat an item monthly and always want it to be done on Wednesday. You scheduled the first task to be done Wednesday, 11/17. In December, the 17th falls on a Friday. The **Backward to Last Available Date** selection tells the Scheduler to move this task to Wednesday, 12/15, because it must move backward to the 15th, not forward to the 22nd.

When you complete setting values for the Repeating Task dialog box, click **OK** to save the changes and return to the Scheduler.

Schedule a Task in Microsoft Outlook

When you schedule a task in the Scheduler, you can also schedule it in Outlook. User Preferences enables you to set the check box as always selected.

When the Schedule Task in Microsoft Outlook check box is enabled, an email of the task is sent to the person for whom it is scheduled. When they accept the task, it is scheduled in their Outlook Task Manager.

If the person declines the task in Outlook, an email is sent to the person who scheduled the task; however, the task is not updated in the Scheduler.

After the task is completed in Sage HRMS, it is automatically marked as completed in Outlook.

Note: Refer to the Microsoft Outlook online help for further information regarding the features of Outlook.

Schedule a System Event

You can schedule a system-wide item, a System Event, pertaining to all users on the system. To schedule a System Event, select **System Event** from the **Priority** drop-down list.

Scheduling a System Event is a bit different from scheduling a Task or Information item. When you schedule a System Event, it is automatically placed on your Organizer in the System Event list and it is

placed on every Sage HRMS user's Organizer as well. This allows you to convey a message to all other users on the system.

Here are two examples of a system event:

Suppose you want to perform the Mass Update process in Sage HRMS on December 5 at 5:00 p.m. You need all other users on the system to exit Sage HRMS before 5:00 so you can run the process.

1. In Sage HRMS, schedule the Mass Update process for yourself (the default) with the **Priority** as **System Event**. Schedule the process to be done 12/5/16. Add a message in the Note text area: "Mass Update will occur at 5:00 today, December 5. Please exit Sage HRMS by 4:55 p.m."
2. The Mass Update process appears on everyone's Organizer in the System Event section on December 5. Each user can view the note by clicking the + button next to the item to open the scheduler, or by right-clicking the item. That way, all users know to exit Sage HRMS before 5:00 p.m. However, the Mass Update process only appears in the Task section of the person scheduled to complete it.

Let's say you routinely perform email maintenance every Friday at 5:30 p.m. and want all users to exit email before you begin maintenance work.

1. Since this is not a system task, schedule this as an Information item. Specify the **Frequency** as **Weekly** and the **Priority** as **System Event**. Add a message in the Note text area: "Please exit email by 5:30 today for weekly maintenance."
2. The Information item is placed on everyone's Organizer each Friday. Users can view the note by clicking the + button next to the item to open the scheduler, or by right-clicking the item.

Note: Only the user for whom the system event is scheduled can edit, delete, or reschedule the system event.

Mark an Item as Complete

The **Task has been completed** check box in the lower left corner of the Scheduler indicates if the item is complete. When you edit a Task or an Information item, the Scheduler opens with this check box enabled.

To signify the item is complete, select the check box. If you are editing a task you have completed, the system automatically marks the item as complete. When you click **OK** to return to the Organizer, the item's **Completed** check box is selected.

The **Task has been completed** check box is disabled when you:

- Schedule a new task or information item.
- Schedule a system event, as there is no completed status for a system event.
- Edit an item completed prior to the current day.

Chapter 4: Setup Checklists

Sage HRMS Setup Checklist

Before you begin using Sage HRMS you must complete several steps. These setup steps allow you to customize the system to meet your employer's requirements precisely.

Steps to Set Up Sage HRMS

1. **Set up the enterprise.** Consider the enterprise as the parent company of your organization. The enterprise contains the standards for your system. You can insert a logo and specify organization titles as you set up the enterprise.
2. **Set up the audit trail for the enterprise.** The Audit Trail gives you the ability to track changes made to the system databases. You can select the database files and fields to audit as well as choose to enable or disable the audit.
3. **Add employers.** Before you can set up an employer, you must add an employer to the system. You enter its name and address as you want them to appear on reports. You can also define the way your employer pays most of its employees, including frequency and units.
4. **Set up employers.** For each Sage HRMS product you are using (Sage HRMS and Time Off), you must define unique parameters for each employer you add to your system.
5. **Set up Code Tables.** Your system uses codes to manage and store information in files. These codes provide abbreviated and standard references to specific information. This step enables you to modify or add to those codes as you customize Sage HRMS to the way you do business.
6. **Set up Benefits.** Sage HRMS uses the guidelines you define for employee benefits. This step allows you to easily manage even the most complex benefit plan, including your employer's insurance and savings plans as well as any rate tables used by the plans.
7. **Set up security.** The system provides an extensive, flexible and easy-to-use security system to help you protect your data. During this final step in the setup procedure, you establish security limits and privileges for all system users. The security system breaks out functions by product, employer, activity, task, and step. When you set up security, you assemble users in security groups and establish passwords for each user.

After you complete the preceding steps, you are ready to begin using Sage HRMS.

Time Off Setup Checklist

Time Off uses the records in Sage HRMS to help you build your attendance tracking system so you can administer attendance benefits and track employee absences.

After you set up your enterprise, employers, code tables, and security in Sage HRMS, you are ready to provide Time Off with the basic information necessary to start tracking and accruing employee absences and benefits.

You must complete several steps before you begin using Time Off.

Steps to Set Up Time Off

1. **Set up the enterprise.** Consider the enterprise as the parent company of your organization. The enterprise contains the standards for your system. You can insert a logo and specify organization titles as you set up the enterprise.
2. **Set up the audit trail** for the enterprise. The Audit Trail gives you the ability to track changes made to the system databases. You can select the database files and fields to audit as well as choose to enable or disable the audit.
3. **Add employers.** Before you can set up an employer, you must add an employer to the system. You enter its name and address as you want them to appear on reports. You can also define the way your employer pays most of its employees, including frequency and units.

After adding your employer, you can begin setting up the employer and your code tables. You must first set up your employer and codes in [Sage HRMS](#).

4. **Set up an employer for Time Off.** For each Sage HRMS product you are using (Sage HRMS and Time Off), you must define unique parameters for each employer you add to your system.
5. **Set up code tables.** Your system uses codes to manage and store information in files. These codes provide abbreviated and standard references to specific information. This step enables you to modify or add to those codes as you customize the system to the way you do business.
6. **Set up security.** After setting up your employers and code tables, you are ready to set up security. The system provides an extensive, flexible, and easy-to-use security system to help you protect your data. During this final step in the setup procedure, you establish security limits and privileges for all system users. The security system breaks out functions by product, employer, activity, task, and step. When you set up security, you assemble users in security groups and establish passwords for each user.
7. **Set up attendance plans.** Attendance plans define types (vacation, sick leave, etc.), calculation methods, and other information required to track time off. Optionally, you can configure Time Off to use rules and data from Sage HRMS Payroll to calculate maximum available hours, maximum carryover hours, and total carryover hours. This approach ensures that Time Off calculations based on hours worked reflect actual hours as recorded in Sage HRMS Payroll.

After you complete the preceding steps, you are ready to [enroll employees into attendance plans](#). Use the [Attendance Summary](#) page to enroll each employee in an attendance plan, include year-to-date absence and attendance benefits information, enter the previous year's carryover units and modify the information as needed. Time Off provides the procedures and utilities to assist you as you fulfill your employer's attendance tracking requirements.

Chapter 5: Setting Up Sage HRMS

Set Up User Preferences

Sage HRMS allows you to customize specific features to suit your needs. The system tracks these preferences for each user logging on to Sage HRMS.

For example, you can select which navigation pane group opens when you log on to Sage HRMS.

From the top of Sage HRMS, select **Settings (⚙️) > User Preferences** to open the User Preferences page. This page includes two tabs: **General Preferences** and **Setup Interviews**.

General Preferences Tab

Use the fields on the **General Preferences** tab to select your user preferences.

Default View

Select the navigation pane group or feature that you want to open in the workspace when you log on to Sage HRMS.

By default, the Welcome to Sage HRMS page opens in the workspace after you log on to Sage HRMS. If you want to hide the Welcome to Sage HRMS page and display only the item you select in this field after you log on, select **Do not show me this page again** on the Welcome to Sage HRMS page.

Employees Toolbar Default

Select the employee-related page you want to automatically open when you log on to Sage HRMS.

The **Employees Toolbar Default** list includes only the pages to which you have security access. If you select a default page that the system administrator might later restrict you from accessing, Sage HRMS assigns the next available page in the list as the default. If the restricted page was last in the list, Sage HRMS assigns the first page in the list as the default.

Training Toolbar Default

Select the training-related page you want to automatically open when you log on to Sage HRMS. This field does not display if you do not have Sage HRMS Train installed.

The **Training Toolbar Default** list includes only the pages to which you have security access. If you select a default page that the system administrator might later restrict you from accessing, Sage HRMS assigns the next available page in the list as the default. If the restricted page was last in the list, Sage HRMS assigns the first page in the list as the default.

HR Employer Default

This drop-down list shows all employers that have been set up in your HR program. The employer you select here is the one that will be used when you open Sage HRMS and view pages in the program, regardless of whether the Employer Filter is set to Enterprise. For example, if you are working with reports or setup processes and your default employer is Dunedin Enterprises, the data used in the processes will be for employer Dunedin Enterprises.

U.S. Payroll Employer Default

This drop-down list shows all U.S. Payroll employers that have been set up in your system (with the assigned Payroll Database ID). The employer you select here is the one that will be used when non-employee level payroll pages are opened, regardless of whether the Employer Filter is set to Enterprise. For example, if you are working with payroll processes and your default U.S. Payroll Employer is US/ABC, the data used in the payroll processes will be for employer US/ABC.

Canadian Payroll Employer Default

This drop-down list shows all Canadian Payroll employers that have been set up in your system (with the assigned Payroll Database ID). The employer you select here is the one that will be used when non-employee level payroll pages are opened, regardless of whether the Employer Filter is set to Enterprise. For example, if you are working with payroll processes and your default U.S. Payroll Employer is Can/ABC, the data used in the payroll processes will be for employer Can/ABC.

Display Main Menu

When selected, Sage HRMS must be restarted and the main menu at the top of the program will be displayed. To hide the main menu, clear the check box. See [Using the Main Menu](#) for more information.

Automatically schedule tasks in Microsoft Outlook

When selected, all tasks listed in Scheduler will be communicated through Microsoft Outlook to the assigned user.

Note: You must enter an email address for the assigned user in User Security for this feature to work.

I want to opt out...

If you do not want to participate in the Product Enhancement or Product Survey programs, select the check boxes on the General Preferences tab.

Setup Interviews Tab

A Setup Interview is a wizard that walks you through the setup specifically for Insurance and Savings plans. Here you can enable or disable setup interviews at the user level. If you enable a Setup Interview, the next time you choose **Setup > Employees >** and **Insurance Plans** or **Savings Plans** and click the **Add** button, Sage HRMS asks you if you want to use the setup interview to help you create an insurance plan or savings plan.

On this tab, select if you want to enable the interview for the [Insurance Plan Setup](#) and the [Savings Plan Setup](#).

Chapter 6: Setting Up the Enterprise

About the Enterprise Setup

Before adding employers and setting up their different requirements, you must set up the enterprise. The Sage HRMS enterprise feature lets you handle a group of employers as one. The enterprise is an efficient time-saver used to manage multiple employers. The enterprise has no employees, but it does provide access to code tables that set the standards for your system.

Understanding the Enterprise

The enterprise lets you group employers together and handle them as one. An enterprise is not actually an employer, even though it appears in a list of employers on your system. The enterprise has no employees, but it does help you establish standards for all the employers in your system.

Think of the enterprise as the "corporate level," encompassing all employers under a single umbrella. You have only one enterprise in your system, but you can have numerous employers.

Each employer can have different setup specifications, such as different codes for the jobs in the company or different salary grade structures. When you set up your employers, you can specify different sets of specifications for each employer.

The enterprise feature helps you in two ways

- You save time because it allows you to manipulate several employers' data at one time rather than working with individual employers to complete identical tasks one at a time.
- The information from *all* your employers is available to you when you are viewing data or printing reports.

Enterprise as a Time-Saver

The enterprise feature saves you time when you are setting up and managing multiple employers. For example, you have an umbrella corporation called National Systems, Inc., with three subsidiary employers called A Corp., B Corp., and C Corp. The umbrella company, National Systems, and its three subsidiaries all have the same benefit plans.

If you are using Sage HRMS, all the codes in the enterprise benefit plan code table apply to all employers in your system, unless you set up a different plan for a particular employer. Therefore, when you first set up your three corporations, A Corp., B Corp., and C Corp., they automatically use the enterprise benefit plan

code tables. You do not have to set up separate benefit plans for each employer because they all conform to the enterprise standards.

If you need to set up a unique plan for one of your employers, the enterprise still saves you time. Copy an enterprise benefit plan to the employer, make your changes and save the benefit table with an employer code. Now you have a unique benefit plan for this employer and you did not have to create it from scratch.

The enterprise also efficiently handles changes to your setup. For example, if you have a rate change in a dental plan and three employers use the enterprise dental plan, simply change the rate once in the enterprise dental plan rather than three times. The rate change you make at the enterprise level affects every employer in your system except those who have unique dental plans.

Enterprise as the Panoramic View

Use the enterprise feature to see a panoramic view of information in Sage HRMS. For example, when you print a report, select the enterprise and Sage HRMS prints information from all your employers in one report. When using the filter feature to control the information you want to use, select the enterprise to give yourself access to data for all employers in the system.

Setting Up the Enterprise

Log on to Sage HRMS. Select **Setup > System > Setup > Enterprise Setup**.

After you define the enterprise setup information, click **OK** to accept your changes and close the Enterprise Setup page. You can also click **Apply** to save your changes but remain on the page. For example, you may want to enter information on the **Enterprise Options** tab, click **Apply** to save your changes, then move to the **Organization Titles** tab.

Enterprise Setup Tabs

Complete each of the following tabs on the Enterprise Setup window:

Enterprise Options

The **Enterprise Options** tab of the Enterprise Setup page contains general setup information for your system.

Country. Select the country that represents the employers in your enterprise. The country you select determines what information is displayed in your Sage HRMS system. For example, if an entire Detail page or a particular field on a Detail page does not apply for a country, it either does not display or it is disabled for an employer in that country.

- Select **U.S.** if all employers in the enterprise are United States employers.
- Select **Canada** if all employers in the enterprise are Canadian employers.

- Select **Both** if there are both United States *and* Canadian employers in the enterprise.

The first time you log on to Sage HRMS, the system asks you for a country setting for your employers. If you need to change the country setting after the initial setting, you can do so on the Enterprise Setup page. When you change the country setting, you must exit Sage HRMS and log on again to complete the country setting change.

Note: After initial setup of your enterprise, if you re-register with a new installation code to either add U.S. payroll to a Canadian payroll system or add Canadian payroll to a U.S. payroll system, you must change the Country setting to **Both** after re-registering and restarting Sage HRMS.

Field List

Field	Description
Enterprise Name	Enter the name of the enterprise. This name is shown on reports and forms
Address and City	Enter up to two street addresses and the city.
State/Province and ZIP/Postal Code	If the country setting is set to U.S., select the state and enter the ZIP. If the country setting is set to Canada, select either State or Province , select the appropriate state or province from the next drop-down list, and then enter the ZIP code or postal code. The State/Province is a required field.
Phone	Enter the telephone number
Training Employer	If you are using Sage HRMS Train, you can select a Training Employer . If you are not using Sage HRMS Train, this field is disabled
Fed Tax ID/Business Number	Enter either a Federal Tax Identification number (for a U.S. company) or a Business Number (for a Canadian company)
Phone Number Format	Select the format in which you want the employee telephone numbers to display.
SSN Masking Format	Choose the format that the SSN will appear on your pages. You can select to display the entire number (123-45-6789), mask (hide) the entire number (XXX-XX-XXXX), or mask all, but the last four digits of the SSN (XXX-XX-6789)
Report Footer	When you generate reports, the date appears at the bottom of each page. You can choose to display both the date and time, or only the date.

Field	Description
Show SSN/SIN on Detail Headers	Choose to show or hide the employee's social security number (for U.S.) or social insurance number (for Canada) in the top section of each employee Detail page.
Show Union Data	Choose to show or hide an employee's union affiliation.
Benefit History	Choose to enable or disable historical benefit information for employees.
Automatically Recalculate Benefits	<p>Choose to automatically calculate benefits:</p> <ul style="list-style-type: none"> • Daily - to update benefits only when the user logs into Sage HRMS. If you select this option, Sage HRMS will not update benefits when the user changes Employee pages. • By Employee - to update benefits only when the user makes changes on Employee pages that trigger Sage HRMS to update benefits. If you select this option, Sage HRMS will not update benefits when the user logs into Sage HRMS. • Daily and By Employee - to update benefits when the user logs into Sage HRMS and when the user makes changes on Employee pages that trigger Sage HRMS to update benefits. • Never - to manually update benefits. <p>Tip: When setting up your system, select Daily or Never to prevent the system from updating after every change.</p>
Show Inactive Codes	As you set up employer or enterprise job codes , organization codes , and reason codes , you set them as active or inactive. When you set Show Inactive Codes to No , codes set as inactive are not included in the list of codes available for selection and assignment to an employee. When you set Show Inactive Codes to Yes , codes set as inactive are included in the list of codes available for selection and assignment to an employee.
Populate Payroll History	This field is available only if Sage HRMS Payroll has been installed. Select Yes to automatically update Sage Employee Self Service Payroll History during the Check Print process in Sage HRMS Payroll. If your organization does not use Sage ESS, select No .

Organization Titles

The **Organization Titles** tab of the Enterprise Setup page enables you to define up to five organization levels for your enterprise. Use these levels as a way to organize your employees.

For example, Richard Miller accepts a marketing position with Multimedia Communications. You add the new employee (Richard Miller) to one of your employers, Multimedia Communications. You specify the department as Marketing and the division as Central. For this example, you define two Organization Titles: Department and Division.

- After defining the organization titles, set up the codes for each organization title in your Organization code tables. In the above example, Marketing is a code under the Department organization title and Central is a code under the Division organization title.
- Enter titles for up to five organization levels.
- When you set up your Organization code tables, you can choose from this list of titles for your enterprise's organization levels and then set up the codes for each organization level.

Logo Setup

The reports you generate within Sage HRMS can include the name and address of your employer as well as a logo for your enterprise. The **Logo Setup** tab of the Enterprise Setup page enables you to select your logo.

Before selecting a logo, you must be able to access it as a bitmap file, a file with the .BMP extension. A bitmap is a collection of picture elements arranged in a pattern resembling a picture.

Note: You can create a bitmap file from scratch using any graphic editing package, such as Microsoft Paint. You can also scan your logo and save it as a bitmap file.

If you are working with live data (rather than sample data), the **Logo Setup** tab is blank the first time it is opened.

If you are working with sample data, the **Logo Setup** tab contains the Dunedin Enterprises logo the first time it is opened.

To Select a Logo

To select a logo, click **Select**. A dialog box opens so you can select the appropriate logo.

Select the correct path and name of your logo's bitmap file. Only those files with a .BMP extension appear. Click **Select**. The bitmap appears on the **Logo Setup** tab.

To Remove a Logo

To remove a logo from your system, click **Remove** on the **Logo Setup** tab.

When you remove a logo, you do not remove the bitmap file from your disk, only from the Sage HRMS database. You can select the file again any time you want.

Audit Trail Setup

The **Audit Trail Setup** tab of the Enterprise Setup page enables you to set up the audit trail.

The audit trail provides the ability to track changes a user makes with a task or to a page. This is an extremely useful tool for safeguarding Sage HRMS data. Auditing changes enables you to:

- Check who is making changes to the system and if the correct changes are being made
- Measure users' performance
- Determine the number of changes users make and how often corrections are being made

The audit trail provides a before and after image of changes. It also keeps track of the date and time and the user who made the change.

The following standard [reports](#) are available to monitor the audit trail. To access the audit trail reports, select **Reports > Audit Trail Reports** from the Navigation Pane.

- The Audit Trail Report by User provides a list of audit trail records sorted by the users who implemented the changes.
- The Audit Trail Report by Date provides a list of audit trail records sorted by the date on which the changes were made.
- The Audit Trail Report by File/Field provides a list of audit trail records sorted by the files and fields in which the changes were made.

To Set Up the Audit Trail

1. Click the **Audit Trail Setup** tab on the Enterprise Setup page.
2. In the **Enable Auditing** field, select **Yes** to turn the Audit Trail on and to enable the rest of the fields on the tab.

Note: Turning the Audit Trail on or off does not affect the audit status of your selected files and fields. You can choose to audit any files and fields by setting their **Audit Status** to **Yes** or **No**. If you turn the Audit Trail on, the selected files and fields will be audited. If you turn the Audit Trail off, the files and fields will not be audited, but their audit status is maintained.

3. In the **Select File to Audit** field, scroll through the list of databases and click a database containing the fields you want to audit. As you select databases, the list of fields in the lower portion of the page changes to display the fields in the selected database.
4. If you want the system to audit the selected database file, select the **Enable File Audit** check box. Otherwise, clear the check box. The database file is preceded by a Yes (the file will be audited) or No (the file will not be audited), depending on whether you chose to audit the file.
5. The system provides three ways in which you can enable or disable auditing for the fields in the selected database file.
 - a. To enable auditing for all the fields in the selected database file, select **Yes** from the **Audit All Fields in File** drop-down list. A check appears in the **Audit** column next to each field in the file to indicate the audit status is **Yes**.

- b. To disable auditing for all the fields in the selected database file, select **No** from the **Audit All Fields in File** drop-down list. The check is removed from the **Audit** column next to each field in the file to indicate the audit status is **No**.
- c. To enable or disable auditing for individual fields in the selected database file, select or clear the check box in the **Audit** column next to the field for which you want to change the audit status.

Note: You can set audit status to **Yes** for any editable field in a database. However, the system only audits the field if you have enabled auditing on the database file that contains the field. For example, you set your audit status to **Yes** for the **Performance Review Rating** field in the Employee Personnel database file. However, you did not enable file audit for the Employee Personnel database file. In this case, the system will not audit the **Performance Review Rating** field (or *any* field in the Employee Personnel file).

6. When you have finished your audit trail setup, click **OK** to save your changes and close the page, or click **Apply** to save your changes and remain on the page. The system proceeds to modify the audited fields list.

User-Defined Code Table Titles

You can use the **User Defined Code Table Titles** tab to define titles and related numeric fields for your user-defined code tables.

Customize Logon

You can use the **Customize Logo** tab to create a custom message for your users that displays on the Sage HRMS Logon window.

Enter a message that is 254 alpha-numeric characters or less that you want your users to view when they log in.

If you do not change the message, the system defaults to the standard logon message. Click **Reset** to restore the standard message.

Chapter 7: Setting Up Employers

Adding an Employer

After setting up your enterprise in Sage HRMS, you are ready to start working with your employers. Setting up your employers is much easier if you gather all the required information beforehand.

You can have as many employers as you like. Each of these employers can have different specifications, such as different codes for jobs in the company, or different salary grade structures. When you set up your employers, you define different sets of specifications for each employer.

When adding an employer to your system, you must define some basic information, such as your employer's name and address. The employer name is at the top of most pages and prints on most standard reports.

You can also define setup information for each Sage HRMS product you are using. The system provides the **Add Employer** task so you can add an employer at any time.

If you have Sage HRMS Payroll

If you installed Sage HRMS Payroll (either U.S. or Canadian), you must first set up a SQL Database before you add an employer with these steps. Review [Configuring Sage HRMS Payroll](#) for instructions to set up a new database, and then continue here to add the payroll employer in Sage HRMS.

For detailed instructions to set up and configure payroll, review the [Sage HRMS Payroll Getting Started Guide](#) on the [Product Documents website](#).

To Add an Employer

1. Select **Setup > System > Setup > Add Employer** to open the Steps for Add Employer Task page.
2. Check the steps you want to complete. Depending on the products you installed, you must set up the employer for each product you are using. Complete each step now or schedule steps for yourself or another user to do later. **Add Employer** is a required step.
3. Click **OK** to open the Employer Setup page.
4. If your installation is configured to support companies in multiple countries, the **Employers Country** field is enabled. Select the country in which this employer does business: either **Canada** or **U.S.**
5. Enter the **Employer Code** that uniquely identifies the employer. Enter a three-character alphanumeric employer code.

6. Enter the **Employer Name**. This field is required because the name appears at the top of pages and prints on most reports. You can also add the employer's street address, city, state or province, ZIP or postal code, telephone number and fax number. The **City** and **State/Province** fields are required.
7. Select the **Pay Frequency** used for the majority of the employees.
8. In the **Normal Units** field, enter the hours or units per pay period worked by most employees. For example, if employees are paid each week for a 40-hour week, enter 40.00. If employees are paid every two weeks for a 37.5-hour week, enter 75.00.
9. Select the employer's language.

Note: The selections you make for steps 7-9 are the defaults when you add new employees to this employer. When adding employees, you can change these as necessary.

10. Select the **Industrial Sector** (used for Canadian Employment Equity reporting).
11. If you have payroll installed, the **Payroll Database ID** and **Payroll DB Name** fields appear.

The **Payroll Database ID** is dynamically populated with the **Employer Code** you entered in Step 5 and is disabled.

In **Payroll DB Name**, enter the name of the SQL payroll database. In the next step, Sage HRMS will verify that the database is present and automatically create a company profile in the database. A series of "Activating Application" messages display indicating the progress of the activation.

12. When you finish, click **OK**.
13. A message notifies you that the process was successful. Click **OK** to restart your system.

Modify an Employer

To Modify an Employer

1. Select **Setup > System > Setup > Modify Employer**. If you have more than one employer defined, you must select the employer you want to modify.
2. Review and edit the information as necessary. You cannot change the employer's **Country** or **Code**.
3. If you are using Sage HRMS Payroll, you must enter the ID for the payroll database you created in SQL Enterprise Manager, in the **Payroll Database ID** field.
4. Click **OK** to save your changes.
5. A message displays that the Modify Employer process was successful. Click **OK** to restart the system.

Delete an Employer

You can delete any employer added to your Sage HRMS system, for example, an employer you added by mistake.

The system provides two options to delete an employer:

- Delete the employer and employee information but maintain the security information and employer setup information.
- Delete all employer and employee information (including security options and employer setup information).

Caution! Deleting an employer permanently deletes all the related employee information. Before deleting an employer, back up the employer's databases. If you need to restore information, you can restore the databases from the backup.

If you use Sage HRMS Payroll, employee information can only be deleted from Sage HRMS databases and not the payroll databases using this procedure.

Delete an Employer

1. Select **Setup > System > Setup > Delete Employer**.
2. Select the employer you want to delete and select the appropriate option for deleting the employer information.
3. Click **OK** to delete the employer. The system asks you to confirm the deletion.
4. Click **Yes** to delete the employer.
5. A message states the Delete Employer process was successful. Click **OK** to restart the system.

Chapter 8: Setting Up Code Tables

About Code Tables

Sage HRMS uses codes to manage and store information in files. These codes provide abbreviated, standard references to specific information. Sage HRMS stores these codes and their associated descriptions in code tables.

A list of state and province abbreviations is an example of a code table. Instead of typing or re-entering a state name (such as Mississippi) in a field, you can select the appropriate code (MS) from a list of predefined codes contained in a code table. Instead of typing British Columbia, you can select the code BC. Code tables contain one column for the code and a second column for the code description.

A drop-down list provides information for a field related to a code table. For instance, if a page contains a field for the state, a drop-down list provides a list of state codes, such as MO, IA, and FL, from which you can choose.

Benefits of Using and Defining Code Tables

Code tables provide several advantages. Using code tables allows you to:

Customize information to meet your employer's needs. For example, you can define unique divisions, departments and locations specific to your employer.

Save time. When you enter information for hundreds of employees, it is much easier and more efficient to type or select **RFT** for each employee rather than type **Regular Full Time**.

Ensure accuracy and consistency. Without a uniform coding scheme, a data entry clerk might enter a department code in several different ways (ENGDEPT, ENGRDEPT, ENG or ENGR) for several different employees. Even though the clerk describes the same department, Sage HRMS interprets the entries as four different pieces of information for four different departments. If the entries are inconsistent, Sage HRMS will not be able to calculate department totals accurately.

Building Code Tables

Most code tables in Sage HRMS are two-column tables containing codes in the left column and brief descriptions in the right column. However, some tables are more complex (benefit plans, for instance) and contain more information than can fit in two columns. The instructions for copying, adding, editing, and deleting codes are identical, whether you work with two-column or multi-column tables. Most code tables have recommended default values. You can [add, edit, or delete values](#) to suit your employer's needs.

All of the predefined code tables in Sage HRMS are enterprise code tables. You can adjust these code tables to contain the codes most frequently used by the employers in your program. These codes then become the standard for your program.

When you initially set up a code table, the codes are blank. As long as the Codes area is blank, an individual employer uses the codes from the enterprise code table. As soon as you add a new code, the program recognizes you are creating a code table that no longer references the enterprise code table. To add a code for a specific employer from the list of enterprise codes, copy the enterprise code table to the employer code table and then add the unique code to the employer's code table.

- For example, if two of three employers in your program use the same codes, edit the enterprise code tables to accommodate the two employers. When you then set up codes for the two employers who share common codes, they automatically use the enterprise codes unless you create new codes in their code tables.
- For the third employer who uses a slightly different set of codes, you can copy the enterprise code table and then make whatever minor changes are necessary to meet the third employer's coding requirements. Therefore, you save time by not having to create a whole new set of codes from scratch, yet you are still able to customize the code table to the third employer's specifications.

Setting Up Code Tables

Sage HRMS allows you to quickly and easily add, edit, copy, and delete codes so you can meet each employer's specific coding requirements. For instance, you might want to change a previously defined code to reflect a change in your organization.

Note: After you save a code, the following fields are disabled:

- Benefit Rate Tables
- Benefit Savings Plans
- Attendance Plans
- Absence Reason Codes
- FMLA Event Reason Codes

Working with Sage HRMS Code Tables

Sage HRMS allows you to quickly and easily add, edit, copy, and delete codes so you can meet each employer's specific coding requirements. For instance, you might want to change a previously defined code to reflect a change in your organization. The following sections describe how to work with Sage HRMS code tables.

To Copy Code Tables

1. Select **Setup > Employees, Time Off, Payroll, or Training > Click the link for the type of codes**

you want to work with. The code table you selected opens.

2. Select the employer with whom you want to work.
3. Click **Copy**. Only those employers with codes defined in the current table appear in the selection list. The employer with whom you are working does not appear in the list because you cannot copy codes from an employer to itself.
4. Highlight the enterprise or employer whose codes you want to copy and click **OK**. For most code tables, the Select Codes to Copy page opens. The **Available** list shows all the defined codes for that code table. The **Selected** list shows those codes you select.

Note: When copying some codes you are first shown a dialog box informing you of the related codes which will be updated to correspond with those you are copying (see Job Codes below). Click **Yes** to continue or click **No** to return to the code table page.

5. From the **Available** list box, double-click the codes you want to copy. The selected codes appears in the right list box. If you want to remove a code from the **Selected** list, highlight it and click **Remove**.
6. Click **OK**. The program checks to see if the codes to be copied are the same as any which already exist for the employer receiving them. If there are any duplicates, Sage HRMS asks whether you want the old code to be overwritten with the new. Select **Yes** or **No**.
7. The new codes are copied to the employer with which you are working. To adapt the code table to this employer's needs, you can add additional codes to the list.
8. Click the **Close** button after you finish making your changes.

To Add Codes

1. Select **Setup > Employees, Time Off, Payroll, or Training > Click the link for the type of codes you want to work with.** The code table you selected opens.
2. Select the employer with whom you want to work.
3. Click **Add**. The codes detail page opens.
4. Enter at least a code and description. Some code tables ask for additional information to be supplied for the added code. Other setup options are:
 - Some code tables contain a blank code described as **None Specified**. This allows you to leave a field blank when you are entering information. To provide this option for your own code tables, include a blank code along with the description **None Specified**.
 - Code tables for Jobs, Organizations, and Reasons provide the ability to make the code **active** or **inactive**. When the code is active, it displays in the code selection list when the user needs to select a particular code on a detail page. However, when the code is inactive (and the [Show Inactive Codes setting on the Enterprise Setup page is set to No](#)), the code does not display in the code selection list.
5. Click **OK**. Sage HRMS checks for duplicate codes and saves the changes if no duplicate exists. If a duplicate is found, the program prompts you to enter a different code.

To Edit Codes

1. Select **Setup > Employees, Time Off, Payroll, or Training > Click the link for the type of codes you want to work with**. The code table you selected opens.
2. Select the employer with whom you want to work.
3. Highlight the code you want to edit and click **More....** The detail page for the code you selected opens.

Notes: Codes that have been set up in the following code tables cannot be changed. If you need to change a code name, create a new code and delete the old one.

- Benefit Rate Tables
- Benefit Savings Plans
- Attendance Plans
- Absence Reason Codes
- FMLA Event Reason Codes

4. Edit the information and click **OK**.

To Delete Codes

1. Select **Setup > Employees, Time Off, Payroll, or Training** then click the link for the type of codes you want to modify. The code table you selected opens.
2. Select the employer with whom you want to work.
3. Highlight the code you want to delete and click **Delete**. Sage HRMS prompts you to confirm the deletion. Also, deleting a code could affect history files and reports that contain the code.
4. Click **Yes** to delete the record, or click **No** to cancel the deletion.
5. Click the **Close** button when you finish.

Add Codes From Details

You can also directly add codes to a code table when you are working with details pages. For every field that references a code table, Sage HRMS provides a drop-down list of codes. For example, on the Current Job page, the **Job Code** field accesses the Job Codes table.

Sage HRMS provides an option that enables you to add a new code while you are entering information on the page. When working with Sage HRMS, you can add codes from pages for all Sage HRMS code tables except for the Benefit Insurance Plans, Benefit Savings Plans, and Benefit Rate Tables. You must access these code tables in Rules to work with them.

To Add a Code From a Detail

For more information about using drop-down lists, see [About Detail Pages](#).

1. Open the drop-down list for the field that references the code table you want to update.
2. Scroll to the bottom of the list and select **Add New Code**. A page opens so you can add a new code.
3. Enter the information for the new code and click **OK**. Sage HRMS adds the code to the list and selects the new code for the field.

Chapter 8: Setting Up Security

Set Up Page Security

When setting up security for your system, you can define the access rights for specific pages. Different users might have different kinds of security access to specific pages. When you find an employee from a page, the only employees who appear are those you have permission to view.

For example, there are two security rules defined for a user named Joan Martin:

- Martin can view the Current Pay pages for employees in employer ABC and employer DEF.
- Martin can view the Wellness pages for employees only in employer ABC.

When Joan Martin is working on the Current Pay page and wants to find an employee, she can see all employees in ABC and DEF. However, if she is working on the Wellness page and wants to find an employee, she is only able to see the employees in ABC. She cannot view or work on the Wellness page of any employee in employer DEF because the system denies her access to that information.

Set Up Security

Sage HRMS has an extensive, flexible, and easy-to-use security system to protect your data. You have complete precision in restricting access because the security system breaks down functions within Sage HRMS by employer, product, activity, task, step, and groups of employees.

If you are the system administrator or the sole user of your system, you can set up Sage HRMS to have access to all security options. Usually an organization's system administrator sets up and changes security privileges for all Sage HRMS system users. For instance, as the system administrator, you can allow a user access to all employee information except current pay data. Or, you can give a user the ability to enter only demographic information for new employees.

As a normal user, you are assigned a user ID and password which establish your ability to view, change, and process data. In this capacity, you are limited to changing your own password.

Security Concepts

Each person accessing Sage HRMS has a user ID, and each user ID is associated with a password. You probably want to establish the same level of security access for a group of users (not just one user), and the Sage security system lets you create security groups and establish different access rights for each group.

Group Security

A security group is a collection of one or more users with the same access rights. Each security group has a name (assigned when you create the group), and each user (other than the system administrator) is a member of a group. As the system administrator, you assign access rights to the group and not to an individual user. The group a user belongs to determines the access rights of an individual user. As the system administrator, you automatically have access to all functions.

Note: The sole purpose of the security system is to restrict access to various areas within Sage HRMS. The system does not keep track of failed attempts to access system features or report on the functions accessed by users.

User Security

Each security group contains one or more users assigned to that group. Each user must have a username, ID, and password to have access to the security group. There are two ways a user can log on to the security group:

- **Using the Sage HRMS user name, ID, and password.** To assign a user to a security group, you will need an ID, name, and password of the user.
- **Using the Microsoft Windows logon and password.** To assign a user to a security group, you will need to add a user's Windows logon credentials to the security group.

Before you Start

Prior to setting up access rights for your users, you must set up several components in your Sage HRMS system.

1. [Set up the enterprise.](#)
2. [Add and set up your employers.](#)

Establish Access Rights

Establish access rights if you want to restrict any portion of the Sage HRMS system to one or more users. However, it might not be necessary for you to set up security for your Sage HRMS system. Consider the following two situations, neither of which require any security setup.

- You are the system administrator and you are the only one using Sage HRMS. You do not need to set up security. When you sign on using MASTER as the user ID, you automatically have access to the entire system.
- You want all users to have unrestricted access to the system. Rather than setting up any security, have each user log on using MASTER as the user ID. Each user can access the entire system.

Note: If you receive updates to Sage HRMS that include new features, the MASTER user ID is automatically updated and always has access to all features. For any additional security groups you

created previously, you must update the security group information to provide access to the new features. This provides a safeguard so you can always decide who can access the new features.

This next situation requires security setup. You are the system administrator and install the following products on your system: Time Off, Sage HRMS, Multi-Site Consolidation, and Sage HRMS Train. You want to set up two users for the employer Dunedin Enterprises.

The first user can only enter new employees into the system. The second user has access to the entire system but cannot view or update certain fields. You must:

- Set Up a [Security Group](#) for User #1
- Set Up a [Security Group](#) for User #2
- [Set Up Users](#)

If you must further restrict your users and disallow access rights to specific employee records, refer to [Product Group Filters](#).

Set Group Security

A security group is a collection of one or more users with the same access rights. Each security group has a name (assigned when you create the group), and each user (other than the system administrator) is a member of a group. As the system administrator, you assign access rights to the group and not to an individual user. The group a user belongs to determines the access rights of an individual user. As the system administrator, you automatically have access to all functions.

Note: The sole purpose of the security system is to restrict access to various areas within Sage HRMS. The system does not keep track of failed attempts to access system features or report on the functions accessed by users.

Security Levels

When you (as the system administrator) set up security for a group, you can establish access rights at the following levels:

- Employer
- Product
- Activity
- Task
- Step
- Field

The employers include all the employers you set up in your enterprise.

You assign access rights to products depending on the products you have installed and set up on your Sage HRMS system. The System is treated as a separate product to help organize tasks.

Note: You must first select **N/A** for the employer before you can select **System** as a product.

The **activities** you can assign access rights to include: Action, Analysis, Detail, Process, Report, and Rule. There is a different set of tasks for each activity and a different set of steps for each task.

You can also set view and update rights for groups of specific fields in an employee's record, such as address and phone, salary, or EEO information.

Setting the [Ad Hoc Reporting Security Level](#) enables you to establish an access level for Crystal and Secure Query. This access level determines which fields in the Sage HRMS system databases are able to be accessed by the security group's users whenever they use Crystal or Secure Query.

Add, Edit, or Delete a Group

To Add a Group

1. Select **Setup > System > Security > Group Security**.
2. To add a group, click **Add**. In the **New Group Name** field enter the name of the group you are adding (up to 20 letters and numbers). Click **OK**.
3. Click **Yes** to verify you are adding the group. The program builds the access rights structure for this group. The Security Group page opens.
4. Initially a new group has no access rights. Accordingly, the page has no entries in any of the columns. The **Modify** button at the bottom of the **Employer** column is enabled, indicating you can modify access rights at the employer level. All other **Modify** buttons are disabled.
5. Click **Modify**. The Employer Selection dialog box opens. The Allow Access column for each employer is initially set to **No**.
 - The Employer list also contains the **N/A** option. Change the access to **Yes** for **N/A** in order to access System in the Product column on the Security Group page.
6. Double-click the employer to change the access to **Yes**.

Caution! If you allow a security group to access Group Security under System Rules, users in that group can change their own security access rights. They can let their security group (and any other security group) access all features, which is the same as no security at all. We recommend limiting the access rights of all security groups to only one security feature: Change Password. The MASTER user ID has access to all Sage HRMS system features.

7. Click **OK**. The system rebuilds the information on the Security Group page.
8. Click **Modify** in the **Product** column to open the Product Selection dialog box. The **Allow Access** column for each product is initially set to **Yes**.

If you have U.S. Payroll and Canadian Payroll installed and want to restrict access to either U.S. Payroll or Canadian Payroll, you must set the security in two steps. Let's say you want to restrict access so that users will only be able to access Canadian Payroll. In the Product Selection dialog box, set the Allow Access to **Yes** for **Canadian Payroll**. Then set the Allow Access to **No** for **Payroll** (which is U.S. Payroll). It is imperative that you set the access correctly for both U.S. Payroll and Canadian Payroll.

9. Double-click the products to change the access to **No**.
10. Click **OK** to return to the Security Group page.
11. Select the product for which you are setting security. All activities, tasks, and steps appear in the related columns.
12. Click **Modify** in the **Activity** column to open the Activity Selection dialog box. The **Allow Access** column for each activity is initially set to **Yes**.
13. Double-click the activity to change the access to **No**.
14. Click **OK** to return to the Security Group page.
15. Select the activity for which you are setting security. The tasks and steps appear in the related columns.
16. Click **Modify** in the **Task** column to open the Task Selection dialog box. The **Allow Access** column for each task is initially set to **Yes**.
17. Double-click the task to change the access to **No**.
18. Click **OK** to return to the Security Group page.

If a user has a task assigned on their Scheduler, the security system does not allow you to restrict that user's access to that task. Therefore, because the user is a member of a security group, the security system does not allow you to restrict that group's access to that task.

19. Select the task for which you are setting security.
20. Click **Modify** in the **Step** column to open the Step Selection dialog box. The **Allow Access** column for each step is initially set to **Yes**.
21. Double-click the step to change the access to **No**. If you selected **Detail** in the **Activity** column, double-click the steps to change access to **View**, **Update**, or **None**.
22. Click **OK** to return to the Security Group page.
23. Repeat steps 4 through 22 to set access rights for another employer, product, activity, task, or step.
24. Click **OK** to return to the Security Groups dialog box.

To Edit a Group

1. Select **Setup > System > Security > Group Security**.
2. Select the group with whom you want to work.
3. Click **More...** The Security Group page opens.

4. Edit information as necessary.
5. Click **OK**.

To Delete a Group

1. Select **Setup > System > Security > Group Security**.
2. Highlight the group you want to delete and click **Delete**.
3. Confirm the deletion.
4. If there are no users in the group, the system deletes the group.
5. If there are users in the group, the system alerts you and asks you to confirm the deletion again. If you select **Yes**, the group and any users within the group are deleted.
6. If a user within the group has tasks scheduled on their Organizer, the system alerts you and does not allow you to delete the group. Click **OK** to display the user's task schedule.

Notes: Before deleting the group, [remove the scheduled tasks](#) from the user's Organizer. Delete the user or assign the user to another security group. Repeat the above procedure to delete the group.

Review the list of tasks. To print the tasks for easy reference, click **Print**. Click the **Close** button to return to the Group Security dialog box.

Set up User Security

Each security group contains one or more users assigned to that group. Each user must have a username, ID, and password to have access to the security group. There are two ways a user can log on to the security group:

- With their Sage HRMS username, ID, and password. To assign a user to a security group, you will need the user's ID, name, and password.
- With their Windows logon and password. To assign a user to a security group, you will need to add the user's Windows logon credentials to the security group.


Adding a User with a Sage logon

1. Select **Setup > System > Security > User Security**.
2. Click **Add**. The User Security dialog box opens.
3. In the **Group** field, select the security group to which you are adding this user.
4. In the **Authentication** field, select **Abra**.
5. Enter up to ten characters for the **User ID**. You can enter the user's initials, the first name, and the first letter of the last name or any other suitable abbreviation. The system converts all characters to upper-case.

6. Enter up to 25 numbers or characters for a **Username**. It can be any combination of uppercase and lowercase letters and numbers. The username should contain the user's full first and last name. It is used in the scheduler for task assignments.
7. Enter up to 10 characters for the user's **Password**. For security reasons, you will not see the password that you enter. Only asterisks appear in the field. The system automatically converts all characters to upper-case.
8. Enter up to 64 characters for the **email address** assigned to the user.
9. Enter up to 25 characters for the user's **Position**, such as a job title.
 - If you use Sage HRMS Link, click **Yes** next to **Allow Access to Abra Link**.
 - If you use Sage Employee Self Service, click **Yes** next to **Allow Single Sign-on to ESS**.
 - If you use My Workforce Analyzer, click **Yes** next to **Allow Access to MWA**.
10. Leave the **Inactivate User ID** selection to **No** when adding an active user.
11. Click **OK**. The Password Verification dialog box opens.
12. Enter the user's password again for verification and click **OK**. The system records the password and returns to the User Security page.
13. Repeat steps 2 through 10 to set up additional users. When you finish, close the Security Groups dialog box.

Note: The MASTER user will always use the **Sage** authentication. If the MASTER user tries to use the Windows logon when logging on to the application, they will receive an invalid username/password message.

Adding a User with Windows logon authentication

1. Select **Setup > System > Security > User Security**.
2. Click **Add**. The User Security dialog box opens.
3. In the **Group** field, select the security group to which you are adding this user.
4. In the **Authentication** field, select **Windows**.
5. Click the **Search Windows User**  button to open the **Select a user** window.
6. Scroll or use search criteria to find the user and click **OK** to return to the **User Security** window. The User ID and username fields show the user's Windows authentication. Note that the domain is included as necessary. The Password field is blank as the user will provide this when they log on.
7. Enter up to 64 characters for the email address assigned to the user.
 - If you use Sage HRMS Link, you can click **Yes** next to **Allow Access to Abra Link**.
 - If you use Sage Employee Self Service, you can click **Yes** next to **Allow Single Sign-on to**

ESS.

- If you use My Workforce Analyzer, you can click **Yes** next to **Allow Access to MWA**.
8. Click **OK**. The user you added displays in the User Security list. The Authentication column indicates the type of logon set for the user.
 9. Repeat steps 2 through 8 to set up additional users. When you finish, close the Security Groups dialog box.

Note: You must repeat this process in Sample data if the user is to be able to access Sample data using Windows Authentication. Additionally, if you are also using Sage Employee Self Service, you must set up Windows Authentication separately from within Sage ESS.


Editing a User

1. Select **Setup > System > Security > User Security**.
2. Select the user with whom you want to work.
3. Click **More...** The User Security dialog box opens.
4. Edit information as necessary.

Note: If you edit a user and change the security group to restrict the user's access, make sure you reassign the tasks this user is no longer able to perform due to restricted access. For information about assigning tasks, see [Use the Scheduler](#).

5. Click **OK**.

Deactivating a User


1. Select **Setup > System > Security > User Security**.
2. Select the user you want to inactivate.
3. Next to **Inactivate User ID**, click **Yes**.
4. Click the **Close** button  to return to the User Security window.

Users who attempt to log on to Sage HRMS with a deactivated user ID are shown an "Invalid username/password." message and cannot log on.

Deleting a User

Important! Before you delete a user from Sage HRMS, consider the impact in your audit trail reports, other reports, and employee lists. Best practice is to deactivate users with any activity in the system. Only delete users if they were added in error.

1. Select **Setup > System > Security > User Security**.

2. Select the user you want to delete.
3. Click **Delete**. If the user is not scheduled to perform any tasks, confirm the deletion. If the user has tasks scheduled on their Organizer, the Sage HRMS system alerts you and does not allow you to delete the user. Click **OK** to display the user's task schedule.
4. Review the list of tasks. To print the tasks for easy reference, click **Print**. Click the **Close** button  to return to the User Security dialog box.

Before deleting the user, [remove the scheduled tasks](#) from the user's Organizer. After deleting the tasks, repeat the above procedure to delete the user.

Set Field Level Security

Field Level Security lets you limit access to certain categories of data for a specific employer. It is available for SAP Crystal Reports, Secure Query and some Sage HRMS detail pages. Field Level Security is set at the group level, and all the users you assign to the group must adhere to the type of security you select for each category.

When you initially add a security group, the group does not have access to view or update fields containing information in the following categories: Address/Phone, Salary, and EEO. You can provide access to view or update these fields through field level security.

Note: Field security is not available for standard reports. If you need to prevent certain employees from viewing specific fields on standard reports, consider removing the entire report from the menus to which the employees have access (use group security to remove reports from menus).

Field Level Access

Fields in the **Address/Phone** category pertain to home, not business information. This information is located on the Demographics page and includes the telephone number, street address, city, state and ZIP code, county, and country.

Fields in the **Salary** category are found on the Payroll Status page in Sage HRMS Payroll and the Current Pay Status page in Sage HRMS. Information includes the

- unit pay rate
- pay period salary
- hours/units worked per pay period
- pay frequency
- annual pay
- shift premium

- last pay change amount or percent bonus amount (if applicable)
- salary grade
- frequency of the employee's contribution to savings plans

The **EEO** category controls access to EEO information and includes marital status, ethnic origin, gender and disability.

Note: Not all these fields are contained in the Sage HRMS system databases. Therefore, for some fields, you can only set field level security if you selected products other than the Sage HRMS system.

Setting Field Level Security

Set Field Level Security

1. Select **Setup > System > Security > Group Security**.
2. Select the group with whom you want to work.
3. Click **More...** The Security Group page opens.
4. Click the **Field Level Security** tab.
5. Select an employer from the **Employer Selection** list.
6. For each applicable category, select the appropriate access level by selecting one of the options listed in the following table. Access rights to fields containing Address/Phone, Salary, or EEO information initially default to **Not View**.

Option	Description
Not View	Restricts users from viewing and updating the data. When users access areas of the system containing these fields, the word Hidden is displayed. <div data-bbox="334 1283 1281 1388" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: If users cannot view a field which appears on a report, they are restricted from generating that report.</p> </div>
View	Enables users to view the data but restricts them from updating it.
Update	Enables users to view and update the data.

7. Click **Apply** to save your changes. You can then select another employer and set field security for that employer.
8. When you are finished setting field security for employers, you can move to another tab on the Security Group page or click **OK** to close the page.

Set Product Group Filters

In addition to restricting access to specific fields with the field level security function, you can select specific employees you want the security group users to access. For example, if you want users of a security group to access only employees whose original hire date is prior to June 1, 2002, the Sage HRMS system lets you set a product group filter allowing access to only employees fitting that criteria.

Setting up a Product Group Filter

To Set a Product Group Filter

To tell the system which database records you want a security group's users to be able to access, build an [expression](#) on the **Product Group Filters** tab of the Security Group page.

1. Select **Setup > System > Security > Group Security**.
2. Select the group you want to work with.
3. Click **More...** The Security Group page opens.
4. Click the **Product Group Filters** tab.
5. Select the product you are using for this group filter.

Note: If Sage HRMS Payroll is included with your system, any product group filters you set for HR automatically apply to Payroll. Therefore, if you select Payroll as your Product Selection, the Fields listed are disabled and cannot be specifically selected for Payroll.

6. Build the expression. An expression consists of a field, relationship, and value. The following sections step you through building an expression.

Field

The **Fields** list contains every field in the master file corresponding to your product. For example, for Sage HRMS, the list includes every field in the Employee Personnel file.

Use the scroll bar in the **Fields** list to locate the field and double-click to select it. The field appears in the Expression box.

Relationship

The **Operators** list contains the mathematical operators signifying the relationship in our expression. Operators specify a relationship between the field and the value. Refer to the following Operators table to see the valid operators and their descriptions.

Use the scroll bar to locate the operator and double-click to select it. The operator is added to the expression in the Expression box.

Operators

Operators

Operator	Description
=	Equal to
!=	Not equal to
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
AND	And - for compound expressions
OR	Or - for compound expressions
+	Add - used when computing a value
-	Subtract - used when computing a value
*	Multiply - used when computing a value
/	Divide - used when computing a value

Value

Enter the expression's value directly into the expression. For example, you want users of a security group to access only employees whose original hire date is prior to June 1, 2002. Place your cursor to the right of the operator. Enter the date in numeric form and enclose it in braces. Your expression reads:

```
P_ORIGHIRE < {06/01/2002}
```

The expression is complete.

Note: The maximum length of an expression is 200 characters.

Verify the Expression

Click **Verify** to make sure your expression is built in a format the system can interpret. The system indicates if the expression is valid. If it is not, determine your error, place your cursor in the Expression box, and then correct the error. Use the **Backspace** and **Delete** keys to clear the expression as necessary.

When your expression is correct, click **Apply** to save your changes and remain on the Security Group page, or click **OK** to save your changes and close the Security Group page.

Note: You can also build a compound expression. For example, if you want to limit access to employees whose original hire date is between April 1, 2002 and June 1, 2002, your expression reads:

```
P_ORIGHIRE > {03/31/2002} AND P_ORIGHIRE < {06/02/2002}
```

Tip: The format of expressions is consistent with the Xbase programming language standards, except the AND and OR operators do not need to be enclosed with periods. If you are familiar with formatting expressions, you might find it easier and faster to enter the complete expression simply by clicking in the expression box and typing the entire expression.

Editing or Deleting a Product Group Filter

To Edit or Delete a Product Group Filter

1. Select **Setup > System > Security > Group Security**.
2. Select the group with whom you want to work.
3. Click **More...** The Security Group page opens.
4. Click the **Product Group Filters** tab.
5. Select the product for which you want to edit or delete the group filter.
6. Place your cursor in the **Expression** box and edit the expression as needed. If you want to delete the filter altogether, use the **Backspace** and **Delete** keys to clear the entire expression.
7. Click **Apply** to save your changes and remain on the Security Group page, or click **OK** to save your changes and close the Security Group page.

Set Ad Hoc Reporting Security

SAP Crystal Reports and Secure Query enable you to design and generate your own queries and reports using system database files. Any user who has access to Crystal or Secure Query can view any field without restrictions. Ad Hoc Reporting Security lets you restrict the database files and fields available to a security group using Crystal or Secure Query.

When you set up security for a group, you can assign an [Ad Hoc Reporting Security Level](#) to each security group. To further restrict access to the user, Ad Hoc Reporting Security lets you assign an access level to each field included in your Sage HRMS databases.

Note: The access levels you assign here affect access only in Crystal and Secure Query and do not impact the rest of the system.

How Access Levels Work

Before changing access levels, you need to understand how access levels work. This section illustrates why you would change access levels for your database fields.

Each field in each database file contained in your Sage HRMS system is listed on this page. The fields are grouped alphabetically by database file. Each line item displays the database file name, the field description, and the field's access level. There are nine access levels (one through nine). Initially, all fields are set to the same access level, one.

Allow All Users Access to All Fields

Working in conjunction with Ad Hoc Reporting Security is the [Ad Hoc Reporting Security Level](#) feature on the [Security Group](#) page.

Initially, when you set up security for a group, the Ad Hoc Reporting Security Level is set to one, just as each field in Ad Hoc Reporting Security is set to one. This means the group's users can access all the fields set to one.

If you want all users to have access to all fields when they generate reports using Crystal or Secure Query, maintain one as your Ad Hoc Reporting Security Level and you do not have to change anything in Ad Hoc Reporting Security.

Note: The MASTER user ID has an Ad Hoc Reporting Security Level of nine and can access all fields.

Restrict User Access to Fields

To restrict a user's access to specific fields in a database, change the field's access level as well as the Ad Hoc Reporting Security Level for the user's security group. The combination of a group's Ad Hoc Reporting Security Level and a field's access level set in Ad Hoc Reporting Security determines if the field is accessible by a user. Consider the following example:

We have two security groups and one user in each group. The first group, Data Entry, has a user called DE. The second group, Pay Manager, has a user called PM. Except for one restriction, we want these users to have the same capabilities generating custom reports in Crystal and Secure Query. However, we do not want DE to have the capabilities to generate a custom report containing the **Earnings/Deductions Code** field.

In Ad Hoc Reporting Security, we change the access level for the Earnings/Deductions code to five. We leave the Ad Hoc Reporting Security Level at one for the Data Entry group, and change it to five for the Pay Manager group.

Now, when DE (a member of the Data Entry group) accesses Crystal or Secure Query, DE cannot create a report containing the **Earnings/Deductions Code** field. DE's security group is set at access level one, which prohibits DE from accessing any Sage HRMS fields with an access level higher than one.

In order to access the **Earnings/Deductions Code** field, a user's group must have an Ad Hoc Reporting ADA Security Level of at least five. Consequently, user PM can access this field. In addition, if we set the Ad Hoc Reporting Security access level to six for the **Earnings/Deductions Code** field, even PM is unable to use that field in Crystal or Secure Query, because PM's access level is only five.

To Set Access Levels

The Ad Hoc Reporting Security page has the means to quickly and easily change access levels for fields in your databases. Before setting access levels, determine to which fields you want to restrict access.

You can set the access level of all fields in all database files, all fields within one database file or one field at a time. The database files and the fields within the files are listed alphabetically. Use the product's Data Dictionary to help you locate a specific field within a database file.

1. Select **Setup > System > Security > Ad Hoc Reporting Security**.
2. Set the access levels as necessary.
3. To set all fields in all database files, enter a number from one to nine in the **All Fields** number box at the top of the page. You can also use the arrows to set the level. All fields change to the access level you set.
4. To set all fields within one database file, locate the database file and click any line item within the file. Enter a number from one to nine in the **Fields for Selected File** number box at the top of the panel. You can also use the arrows to set the level. All fields within the selected database file change to your selected access level.
5. To set one field at a time, use the scroll bar to locate the field. To set the access level, click the line item to select it and enter a number from one to nine.

Tip: Set the access level for all fields in all database files first. If you want a different access level for specific files, set them next. Remember, setting an access level for all fields overrides any previously established field settings.


Ad Hoc Reporting Security Level

Setting a group's access level for SAP Crystal Reports and Secure Query works in conjunction with setting Ad Hoc Reporting Security. When you set security for SAP Crystal Reports and Secure Query, you can define access rights at the field level, and each field in your Sage HRMS system is assigned its own level of security.

When you set up security for a group, select **Setup > System > Security > Group Security** to establish an access level for SAP Crystal Reports and Secure Query. This access level determines which fields in the Sage HRMS system databases are able to be accessed by the security group's users whenever they use Crystal or Secure Query.

For example, if you set the Ad Hoc Reporting Security Level to one, users can only access database fields with an access level of one. If you set the Ad Hoc Reporting Security Level to two, users can access database fields whose access levels are one or two. Following this logic, if you set the Ad Hoc Reporting Security Level to nine, users can access all database fields and have access to levels one through nine.

To Set a Group's Ad Hoc Reporting Security Level

1. Select **Setup > System > Security > Group Security**.
2. Double-click the group you want to work with to open the Security Groups page.
3. [Set security](#) for **Employer, Product, Activity, Task, and Step**.
4. If necessary, set a [product group filter](#) and [field level security](#).
5. Change the **Ad Hoc Reporting Security Level** by entering a number from one to nine or use the arrows to change the number.
6. Click **OK** to save your changes and return to the Security Groups dialog box.
7. Click the **Close** button  to close the Security Groups dialog box.