



# Sage HRMS

## Custom Details User Guide

February 2015

This is a publication of Sage Software, Inc.

Document version: January 30, 2015

Copyright © 2015. Sage Software, Inc. All rights reserved. Sage, the Sage logos, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc. or its affiliated entities. All other trademarks are the property of their respective owners. Your use of this document and the Sage product(s) described herein is governed by the terms and conditions of the Sage End User License Agreement ("EULA") or other agreement that is provided with or included in the Sage product. Nothing in this document supplements, modifies or amends those terms and conditions. Except as expressly stated in those terms and conditions, the information in this document is provided by Sage "AS IS" and Sage disclaims all express, implied or statutory warranties of any kind, including but not limited to the warranties of merchantability, fitness for a particular purpose or of non-infringement. No implied license is granted to you under any Sage intellectual property or trade secret right. Sage reserves the right to revise, supplement, or remove information in this document at any time without notice to you or others.

Sage End User License: <http://na.sage.com/sage-na/eula>

# Table of Contents

---

<b>Overview .....</b>	<b>1</b>
<b>Designing Custom Pages .....</b>	<b>2</b>
Use Custom Pages .....	10
Custom Databases .....	11
<b>Designing Custom Actions.....</b>	<b>15</b>
Designing Custom Actions.....	15
<b>Menus, the Navigation Pane, and Toolbars .....</b>	<b>19</b>
Customizing the Sage HRMS Menus and Toolbars .....	19
Customize the Navigation Pane .....	23
Customize the Employee or Training Toolbar.....	24
Customize the Quick Launch Toolbar .....	26
Change the Order of Items on a Menu.....	28
Add Borders to a Menu.....	29
Add a Submenu to a Menu.....	30
Copy Menu Customizations.....	32
Remove Customizations .....	32
<b>Setting Up Security for Custom Details.....</b>	<b>34</b>
Define Security for Custom Pages .....	34
Define Security for Custom Code Tables.....	35
Define Access to SAP Crystal Reports® .....	35
<b>Reference Material .....</b>	<b>39</b>
Custom Details Database File List.....	39

Custom Details for Sage HRMS extends the capabilities of the custom pages feature included with Sage HRMS. Use Custom Details to:

- Design custom pages and fields
- Design custom actions
- Create custom code tables
- Customize the Sage HRMS menu and toolbars

It is easy to work with Custom Details. However, you should be familiar with the Sage HRMS system before you begin to customize it.

## **Customizing Pages and Fields**

Custom Details extends the capabilities of the custom pages feature included with Sage HRMS. For example, you can:

- Add up to five tabs on a page.
- Adjust the display size of fields to match the size of the information.
- Specify which fields on a page are required during data entry and cannot be left blank.
- Create custom calculated fields.
- Associate custom fields with field level security to control user access to the fields.

## **Creating Custom Code Tables**

With Custom Details, you can:

- Create your own user-defined code table.
- Relate character and numeric fields with each code.

## **Customizing the Sage HRMS Menus and Toolbars**

The menu customization features of Custom Details enable you to:

- Add, edit, and delete buttons.
- Add your own actions and edit or delete existing ones.
- Delete processes, analyses, and rules.
- Add custom pages to the Details menu, and add or edit the Details toolbar buttons.
- Add submenus and change the order of items on menus.

# Designing Custom Pages

---

Custom pages are used to enter and maintain information unique to your employer. You can track information relating to employees, for example, company credit cards, security clearances, office assignments.

Custom pages can include both standard Sage HRMS fields and custom fields that you create. You can also create custom code tables and reference them with your custom fields. Using SAP Crystal Reports®, you can then access the custom fields and create custom reports.

You can create single or multi-record pages.

## Single Record Page

A single-record page contains a collection of data that pertains to one record and that normally does not change over time; therefore, you do not need to track past records.

- A single-record page without tabs may contain up to 20 fields.
- A single-record page with tabs may contain up to 16 fields per tab, for a maximum of 80 fields.

[Click here for an example.](#)

## Multi-record Page

A multi-record page can track the history of a collection of data that normally changes over time; therefore, you can keep track of past records.

- A multi-record page without tabs may contain up to 20 fields.
- A multi-record page with tabs may contain up to 18 fields per tab, for a maximum of 90 fields.

[Click here for an example.](#)

Both single and multi-record pages can have up to five tabs, allowing you to organize the information into categories (e.g., a custom Company Cars page could have one tab for car information and one tab for employee information).

For additional customization options, use Custom Details to create menus, processes, actions, reports, toolbars, pages, and fields to more precisely meet your organization's unique requirements.

## Design a Custom Page

When designing a custom page, you can add your own custom fields as well as add existing fields from Sage HRMS databases. You can also create custom code tables and reference them on your custom pages.

---

**Note:** You must define any custom code tables you want to use **before** you design or use your custom pages.

---

After designing your custom pages, you must give users access to them by updating the group security information.

### To Design a Custom Page

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details window displays.
2. From the Detail Type drop-down list, select **Employee**. Sage HRMS automatically displays a list of existing custom pages.
3. Click **Add**. The Create a New Custom Detail dialog box opens.
  - a. In the **Detail Name** field, enter a unique name for the page.
  - b. For **Multi-Record**, click **Yes** to design a multi-record page or click **No** to design a single-record page.
  - c. For **Multi-Page**, click **Yes** to design a page with multiple tabs or click **No** to design a page with no tabs.
  - d. For **Total Pages**, enter the number of tabs up to a maximum of five. This field is enabled only if you selected Multi-Page.
  - e. Click **OK** to save your changes. A blank page opens with the page name and any tabs you may have selected. To change the default titles on the tabs, click the **Properties** button, and select Single Page or Multi-Page. Then:
    - Click the **Page Properties** tab.
    - Select the total number of pages (tabs) for the page you are creating.
    - Enter titles for each tab or keep the defaults, such as Page 1, Page 2, and so forth.
    - Click **OK**. Your new custom page displays and shows all the tabs and their titles.
4. On the blank page, move your mouse pointer up and down (or press the **Tab** key) to show the field locations. The field locations are arranged in two columns.
5. Click the location where you want to add a field. The Define a Custom Field window opens.
  - a. Select to add a Sage HRMS main employee field or a custom field. The fields in the **Select a Field** list change accordingly.
    - To add a Sage HRMS field, click **Main Employee Fields**. The Select a Field list contains all the fields in HRPERSNL.
    - To add a custom field, click **Employee Custom Fields**. The **Select a Field** list contains all the fields in HRTKPERS. Note that if you are designing a multi-record page, the list only displays the custom fields in the page's unique database (TKMULXXX).
  - b. Choose a field from the list and click **OK** to display the field on the page.

---

**Note:** If job code validation is enabled, when you select job code as a field to add to the page, the **job code** will be used. If job code validation is disabled, when you select job code as a field to add to the page, the **job title** will be used.

---

6. Continue adding fields as necessary.
  - As you are designing a custom page, you can move a field, resize a field, edit the properties of a field or delete a field as necessary.
  - If you want to add a field that is not in the list, refer to Define a New Custom Field.
7. When done, click **Apply** to save your changes and remain on the page, or click **OK** to save your changes and close the page.

## Define a Custom Field

1. From the navigation pane, select **System > Design Custom Details**.
2. Select the page and click **More**.
3. Click the location where you want to add the field. The Define a Custom Field dialog box opens.
4. Click **Employee Custom Fields** and then click **Add**. The Field Information dialog box opens.
5. In the **Field Title** box, enter up to 20 characters for the field title (label) as it is to appear on the page.
6. In the **Database Field** box, enter up to eight characters for a field name that will uniquely identify the field in the custom database. When you save the field, Custom Details automatically adds a "U" to the field name.
7. From the **Data Type** drop-down list, select a data type. Depending on the data type selected, you may need to define related properties for the custom field, as described in the data type table.

Data Type	Related Property
Character	Specify the <b>Field Length</b> . The maximum length is 254 characters.
Numeric	Specify the <b>Field Length</b> and number of <b>Decimal Places</b> .
Date	Automatically formatted.
Code Table	Select the appropriate custom Code Table from the <b>Table Name</b> drop-down list. <b>Note</b> You must define any code tables you want to use <b>before</b> designing or using your custom pages.
Logical	Automatically formatted with <b>Yes</b> and <b>No</b> radio buttons.
Calculated	Build an expression using the Expression Builder.

8. For **Required Field**, select **Yes** or **No**. If you select **Yes**, the field cannot be left blank when a user is entering data on the page.
  - a. This property is not available for Logical or Calculated fields.
  - b. A required field is indicated by a red "R" on the design page; the "R" is not visible when a user is entering data on the page.
9. For **Field Level Security**, select from three **Field Level Security** options: **Same as Address/Phone**, **Same as EEO**, or **Same as Salary**. For example, if you select Same as Salary, users will have the same access to view or update this custom field that they have for salary fields.
  - a. A field with Field Level Security is indicated by a blue "S" on the design page; the "S" is not visible when a user is entering data on the page.
  - b. Field level security only affects whether a user can view or update the fields on a custom page. You must also set security for custom fields when generating custom reports.
10. Click **OK** to save the field properties and close the dialog box.
11. Continue to create new custom fields as needed.

## Modify a Custom Page

You can modify your custom pages as necessary. You can:

- Add fields
- Move fields
- Resize fields
- Edit field properties
- Delete fields

---

**Note:** If you are using Sage HRMS on a network, do not modify or delete a custom page while other users are accessing the page.

---

## To Add a Field

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page you want to modify.
3. Click the location where you want to add the field. The Define a Custom Detail Field dialog box opens.
4. Select the type of field you want to add: **Sage HRMS** or **Custom**.



5. From the list, select the field and click **OK**. Sage HRMS displays the inserted field on the page.
6. Continue inserting fields as necessary.
7. When done, click **Apply** and then click **OK**.

### To Move a Field

You can move a field to any location on the page that does not already contain a field and that is large enough to accommodate the field.

To move a field on the same page:

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page you want to modify.
3. Click the field label.
4. Drag the field to the new location.
5. When done, click **Apply** and **OK**.

To move a field to another tab on the same page:

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page you want to modify.
3. Click the field label.
4. Drag the field over the tab on which you want to place the field.
5. When the tab displays, drag the field to the new location.
6. When done, click **Apply** and **OK**.

### To Resize a Field

Custom Details displays all fields on the page in a standard size, regardless of the actual length of the field in the database. You can resize a field so that it matches the size of the data in the field.

---

**Note:** Changing the display size of a field does not change the length of the field in the database.

---

To make a field smaller:

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page you want to modify.
3. Click the handle on the right side of the field.
4. Drag it to the left.
5. When done, click **Apply** and **OK**.

To make a field larger:

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page you want to modify.
3. Click the "handle" on the right side of the field.
4. Drag it to the right. You can make a field as wide as the page, provided there are no other fields in the same row.
5. When done, click **Apply** and **OK**.

### To Edit Field Properties

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page you want to modify.
3. Click the field you want to edit. The Field Information dialog box opens.
4. Make your changes. The following table indicates the changes that can be made to a field:

If you are editing a:	You can change:
Custom field	Field Title Field Level Security Required Field
Calculated field	Field Title Field Level Security Required Field Expression
Sage HRMS field on a single-record page	Field Title Required Field
Sage HRMS field on a multi-record page	Field Title

---

**Note:** If you need to change field properties such as **Field Type** and **Field Length**, you must delete the field and then add a new custom field with the correct properties.

---

5. If you selected to change the **Field Title**, Sage HRMS asks if you want to update the Data Dictionary. Click **Yes**.
6. When done editing field properties, click **OK**.

## To Delete a Field

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the page you want to modify and click **More**. Sage HRMS displays the page and its included fields.
3. Click the field you want to delete. The Field Information dialog box opens.
4. Click **Delete**. If the field is a custom field that is not used on any other page, Custom Details asks whether you want to remove the field from the database.
5. If you click **Yes**, Custom Details deletes the field from the page and the applicable database.
6. If you click **No**, Sage HRMS removes the field only from the page.
7. When done, click **Apply** and **OK**.

## Delete a Custom Page

1. From the navigation pane, select **System > Design Custom Details**. The Design Custom Details dialog box opens.
2. Select the custom page and click **Delete**.
3. If you are deleting a single-record page containing custom fields that are not used on any other pages, Custom Details asks whether you want to remove the unused fields from the database.
  - a. If you select **Yes**, Custom Details deletes the page and the unused fields.
  - b. If you select **No**, Custom Details deletes only the page.

---

**Note:** If you are using Sage HRMS on a network, do not delete a custom page while other users are accessing the page.

---

## Create a Custom Code Table

If you are using Sage HRMS or Training, you create custom code tables during Enterprise Setup.

### To Create a Custom Code Table

1. From the navigation pane, select **Setup > System > Setup > Enterprise Setup**.
2. Click the **User-Defined Code Table Titles** tab. All the user-defined code tables are displayed.
3. Click **Add**. The Add User Defined Table Title dialog box opens.
4. In the **Title** field, enter up to 25 characters for the title.
5. Enter titles for up to three **Related Character Fields** and three **Related Numeric Fields**. These fields enable you to store additional data for each code in the table.

6. Click **OK**. The code table appears in the list on the Enterprise Setup page. If you need to edit the code table, click the + sign next to the title, or highlight the title and click **More**. Make your changes and click **OK**.
7. When you are finished, click **Apply** to save your changes and remain on the Enterprise Setup page, or click **OK** to save your changes and close the Enterprise Setup page.

---

**Note:** You can create up to 35 user-defined code table titles for Sage HRMS and Training

---

8. After you have created the table, you can add codes, code descriptions, and related information.

### To Add Codes to a Custom Code Table

1. From the navigation pane, select **Setup > Employees** or **Training > Code tables > User-Defined**.
2. From the **Employer** drop-down list, select the employer with whom you want to work.
3. From the **Code Type** drop-down list, select the code table.
4. Click **Add**. The User-Defined Codes Detail page opens.
  - a. In the **Code** field, enter up to 15 characters for the code.
  - b. In the **Description** field, enter up to 25 characters for the description.
  - c. If you have defined any **Related Character** fields, enter information as needed.
  - d. If you have defined any **Related Numeric** fields, enter information as needed.
  - e. Click **Apply** to save the information and stay on the page or click **OK** to save the information and close the page.
5. When you are finished, click **Close**.

### Modify a Custom Code Table

You can modify your custom, user-defined code tables as needed. You can:

- Change the title of a table and other information about the table.
- Delete a custom table that is no longer needed.
- Modify the codes and their descriptions.

### To Modify a Custom Code Table

1. From the navigation pane, select **Setup > System > Enterprise Setup**. The Enterprise Setup page opens.
2. Click the **User-Defined Code Table Titles** tab. All the user-defined code tables are displayed.
3. Click the + sign next to the title of the code table you want to modify (or highlight the title and click **More**). The User Defined Table Title dialog box opens.
  - a. Modify the **Title** and related fields as needed.

- b. Click **OK**.
4. When you are finished, click **Apply** to save your changes and remain on the Enterprise Setup page, or click **OK** to save your changes and close the Enterprise Setup page.

### To Delete a Custom Code Table

1. From the navigation pane, select Setup > System > Enterprise Setup. The Enterprise Setup page opens.
2. Click the User-Defined Code Table Titles tab. All the user-defined code tables are displayed.
3. Highlight the code table and click Delete. The system prompts you to confirm the deletion. Click Yes to delete the code table. Click No if you do not want to delete the table.

---

**Note:** If codes have been defined for the table, the system displays a message that you must delete the codes before you can delete the table. See To Delete Codes from a Code Table.

---

4. When you are finished, click Apply to save your changes and remain on the Enterprise Setup page, or click OK to save your changes and close the Enterprise Setup page.

### To Modify Codes in a Custom Code Table


1. Log into the company you want to work with.
2. From the navigation pane, select **Setup > Employees** or **Training > User-Defined**. The User-Defined Codes page opens.
3. From the Rule Type drop-down list, select the code table.
4. You can add or modify codes in the table.
  - a. To add a code, click **Add**. The User-Defined Codes Detail page opens. Add the code and click **OK**.
  - b. To modify a code, click the + sign next to the code you want to modify (or highlight the code and click More.). Make your changes and click **OK**.
  - c. To delete a code, highlight the code and click **Delete**. The system prompts you to confirm the deletion. Click **Yes** to delete the code. Click **No** if you do not want to delete the code.
5. When you are finished, click **Close**.

## Use Custom Pages

After creating your custom pages, use them to enter and track the information you need.

### To Use a Custom page

1. From the navigation pane, select **Employees** or **Training > View/Edit Employees** or **View/Edit Trainee**.
2. Find an employee or trainee.
3. Select the **Custom** tab then click **Custom Details** on the Employee or Training Toolbar.
4. Select the Custom Detail then click **OK**.

5. Review or edit the information as necessary. If you are using a multi-record page, the sort order is based on the field you inserted in the top left corner of the page. To see a record's detail, click the More button  next to the record, or highlight the record and click **More**. The custom fields you added to the multi-record page appear on the detail page.
6. When you finish, click **Apply** to save your changes and remain on the page, or click **OK** to save your changes and close the page.

## Custom Databases

The following lists the file name of each custom database file. Using SAP Crystal Reports® for Sage, you can access the custom page databases and create your own reports to review and use your information.

**Note:** The database structure for these files vary based on the custom fields you have added for your custom pages.

### HRTKPERS (TKPE)

Employee Custom Detail Data

Seq	Field Name	Type	Length	Dec	Description
1	U_CHADATE	D	8	0	Last Change Date
3	U_EMPNO	C	9	0	Employee ID
3	U_COMPANY	C	3	0	Employer Code

### TKFIELD (TKFLD)

Custom Detail Field Definitions

Seq	Field Name	Type	Length	Dec	Description
1	D_ALIAS	C	8	0	Field Alias
2	D_CHGLEVEL	C	10	0	Change Level
3	D_DEC	N	3	0	Decimal Places
4	D_DESC	C	40	0	Field Description

Seq	Field Name	Type	Length	Dec	Description
5	D_DOSCOMP	C	3	0	DOS Company Code
6	D_FIELD	C	10	0	Field Name
7	D_FILE	C	8	0	File Name
8	D_FORMULA	M	10	0	Formula
9	D_LEN	N	3	0	Field Length
10	D_LEVEL	N	2	0	RR Security Level
11	D_MASSUP	L	1	0	Mass Updateable
12	D_OBJTYPE	C	1	0	Object Type
13	D_ORDER	N	2	0	Order
14	D_PANEL	C	30	0	Related Page
15	D_SECNAME	C	8	0	Secondary Alias Name
16	D_TABLE	C	2	0	Table ID
17	D_TABNAME	C	25	0	Table Name
18	D_TYPE	C	1	0	Field Type
19	D_WIDTH	N	4	0	Font Width

## TKSCREEN (TKSCR)

### Custom Detail Screen Definitions

Seq	Field Name	Type	Length	Dec	Description
1	S_ALIAS	C	8	0	Field Alias
2	S_COL	C	10	0	Column Position

Seq	Field Name	Type	Length	Dec	Description
3	S_DOSCOMP	C	3	0	DOS Company Code
4	S_FIELD	C	10	0	Field Name
5	S_LBLLEFT	N	3	0	Left Position of Label
6	S_NAME	C	25	0	Page Name
7	S_OBJLEFT	N	3	0	Left Position of Object
8	S_OBJTYPE	C	1	0	Object Type
9	S_OBJWIDTH	N	3	0	Object Width
10	S_PAGE	N	1	0	Page Number
11	S_PANTYPE	C	2	0	Type of Page
12	S_REQUIRED	C	1	0	Required Field
13	S_ROW	C	1	0	Row Position
14	S_SECURITY	C	10	0	Security Setting
15	S_TITLE	C	20	0	Field Title
16	S_VALIDATE	C	1	0	User Defined Function Call

### TKMULXXX (TKMULXXX)

Custom Detail (Detail Name) Data

Seq	Field Name	Type	Length	Dec	Description
1	U_COMPANY	C	3	0	Employer Code
2	U_EMPNO	C	9	0	Employee ID



**Note:** The TKMULXXX files relate to multi-record pages only. The number of multi-record custom page databases varies based on the number of multi-record pages you create. You can create up to 999 multi-record pages, thus the name of the database file can be TKMUL001 to TKMUL999. The database file description includes the name of the page.

The database structure for all TKMULXXX files varies based on the custom fields you have added to your Employee, Applicant or Requisition multi-record custom pages.

---

# Designing Custom Actions

---

## Designing Custom Actions

Custom Details is used to customize standard Sage HRMS actions and add your own custom actions. You can:

- Add steps to standard Sage HRMS actions. The new steps can reference standard Sage HRMS pages or custom pages you have created.
- Delete steps from standard Sage HRMS tasks and processes, as long as the steps are not required by the system.
- Design your own tasks and processes with steps referencing standard Sage HRMS pages or custom pages.
- Delete actions from the menu.
- Change the order of actions in the Actions menu.
- Add actions to submenus on the Actions menu.

### Design a Custom Action

You can design a custom action that uses your custom pages. The custom action can then be added to the Actions menu or to a submenu that you have added.

#### To Design a Custom Action

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
2. From the **Product** drop-down list, select a product.
3. From the **Activity** drop-down list, select **Action**.
4. From the **Action** drop-down list, select **All**. The actions appear in the **Actions** list on the right.
5. Click **Add**. The Customize Actions dialog box opens.
  - a. In the **Action** field, enter the name of the new action.
  - b. In the **Action Type** field, select an action type from the drop-down list.
    - If you are adding an action to Sage HRMS or Time Off, you can select only Employee type.
    - If you are adding an action to Training, you can select either Employee or Class type.

- c. Enter a message in the **Status Bar Message** field. This message displays in the Status Bar at the bottom of the Sage HRMS page whenever you move the mouse pointer over the action in the Actions menu. If you enter nothing, the status bar message will default to the name of the action.
  - d. Click **OK** to save your changes and close the dialog box.
6. Select the new action from the **Actions** drop-down list. All the steps in the action are displayed in the **Steps** list on the right.

---

**Note:** Sage HRMS automatically adds the Find Employee step to all employee actions and the Select a Class step to all class actions.

---

7. To add a step, click **Add**. The Customize Steps dialog box opens.
  - a. Select the step you want to add from the **Step** drop-down list. This list contains all the standard pages for the selected action type, as well as the custom pages for the selected product.
  - b. If you want the step to be required, select the **Required Step** check box. If a step is required, the step is automatically selected on the steps page when a user initiates the action.
  - c. Click **OK** to save your changes and close the dialog box.
8. Add additional steps to the action as needed. A single action can contain a maximum of 18 steps.
9. If you want to rearrange the order of the steps, click the button next to a step and drag it to the new location.

---

**Note:** The Find Employee (or Select Class) step must always be the first step and cannot be moved.

---

10. When done adding steps, click **OK**.
11. Select **Yes** to rebuild your system files. When the process is complete, you are returned to the Logon page. Log back on to view your customizations.

## Modify an Action

You can modify an action in the following ways:

- Add new steps to an action.
- Modify a step in an action.
- Delete steps from an action.
- Delete an action from the menu if it's no longer needed.

You can also:

- Add an action to a submenu on the Actions menu.

### To Add a New Step to an Action

1. From the navigation pane, select **System > Customize Menu**.
2. From the **Product** drop-down list, select a product.
3. From the **Activity** drop-down list, select **Action**.
4. From the **Action** drop-down list, select the action to which you want to add a step. The steps appear in the **Steps** list box on the right.
5. Click **Add**. The Customize Steps dialog box opens.
  - a. Select the step you want to add from the **Steps** drop-down list. This list contains all the standard pages for the selected action type, as well as the custom pages for the selected product.
  - b. If you want the step to be required, select the **Required Step** check box. If a step is required, the step is automatically checked on the steps page when a user initiates the action.
  - c. Click **OK** to save the new step.
6. Add additional steps to the action as needed. Note that a single action can contain a maximum of 18 steps.
7. To rearrange the order of the steps, click the button next to a step and drag it to the new location.
8. **Note:** The Find Employee (or Class) step must always be the first step and cannot be moved.
9. When done adding steps, click **OK** to save the action.
10. Click **Yes** to rebuild your system files.

### To Modify a Step in an Action

1. From the navigation pane, select **System > Customize Menu**.
2. From the Product drop-down list, select a product.
3. From the Activity drop-down list, select Action.
4. From the Action drop-down list, select the action to which you want to add a step. The steps appear in the Steps list box on the right.
5. Select the step you want to modify and click More. The Customize Steps dialog box opens.
  - a. Select or clear the **Required Step** check box. If a step is required, the step is automatically selected on the steps page when a user initiates the action.
  - b. Click **OK** to save your changes to the step.

---

**Note:** You cannot edit steps required by standard Sage HRMS actions.

---

6. When done modifying steps in the action, click OK to save your changes to the action.
7. Click Yes to rebuild your system files.

### To Delete a Step from an Action

1. From the navigation pane, select **System > Customize Menu**.
2. From the **Product** drop-down list, select a product.
3. From the **Activity** drop-down list, select **Action**.
4. From the **Action** drop-down list, select the action to which you want to add a step. The steps appear in the **Steps** list box on the right.
5. Select the step you want to delete and click **Delete**. Confirm the deletion. You cannot delete required steps from standard Sage HRMS actions.
6. Click **OK** to save your changes to the action.
7. Click **Yes** to rebuild your system files.

### To Delete an Action

1. From the navigation pane, select **System > Customize Menu**.
2. From the **Product** drop-down list, select a product.
3. From the **Activity** drop-down list, select **Action**. The actions appear in the **Actions** list box on the right. You are only deleting the action from the menu, not from the system.
4. Select the action and click **Delete**. Confirm the deletion.
5. Click **Yes** to rebuild your system files.

# Menus, the Navigation Pane, and Toolbars

---

## Customizing the Sage HRMS Menus and Toolbars

The customization features of Custom Details are used to customize the Sage HRMS menus and toolbars:

**Actions Menu.** You can add your custom actions to the menu or create a submenu for them. You can also delete actions which you do not use.

**Rules, Processes and Analysis Menus.** You can delete rules, processes and analyses. You can change the order of items on any menu. You can also create submenus and add borders to separate menu items.

**Reports Menu.** You can add new report groups containing reports created in SAP Crystal Reports®. You can also delete reports or report groups; change the order of items on any menu, create submenus and add borders to separate menu items.

**Details Menu.** You can add your custom pages to the Details menu. You can also delete pages; change the order of items on the menu, create submenus and add borders to separate menu items.

---

**Note:** Sage HRMS synchronizes the navigation pane to match what you add or remove from menus.

---

**Employee or Training Toolbar.** You can add buttons for your custom pages to the Employee or Training Toolbar (for a maximum of 9 total buttons on the toolbar). You can also delete or change the toolbar buttons.

**Quick Launch Toolbar.** You can add buttons to the toolbar, enabling you to launch external programs, just like Microsoft Office programs can be launched. You can add or delete programs associated with the buttons, change program icons and delete buttons altogether to further customize the toolbar.

### Steps to Customize your Sage HRMS Menus and Toolbars

---

**Note:** If you are using Sage HRMS on a network, make sure all other users log out of Sage HRMS before you begin customizing the Sage HRMS menu. When you have completed your customizations and rebuilt system files, other users can log back on.

---

1. You will use the system process Customize Menu to make your customizations to the menus and toolbars.

---

**Note:** When you delete an item from a menu, such as a page, process or rule, you are only removing it from the menu; the item itself and any associated data remains intact in Sage HRMS and can be restored at any time. Additionally, Sage HRMS automatically synchronizes the navigation pane to match your changes.

---

2. When finished, you must rebuild system files in order for the changes (your customizations) to take effect.

3. After the Rebuild System Files process is complete, you are returned to the Logon page. Log on to the database you customized (either sample data or live data) and you will see the customizations you have created.

## Customize the Actions, Processes, Analysis, and Rules Menus

Custom Details enables you to customize the standard menus. You can:

- Delete items from a menu. You are only deleting the item from the menu, not from the system.
- Change the order of items on their respective menus.
- Add items to submenus.

---

**Note:** If you delete an item from the menu, Sage HRMS also removes the item from the navigation pane.

---

### To Delete an Item from a Menu

1. From the navigation pane, select **System > Customize Menu**.
2. From the **Product** drop-down list, select a product
3. From the **Activity** list, make your selection.
4. To delete an action, select **Action** from the list.
5. To delete a process, select **Process** from the list.
6. To delete an analysis, select **Analysis** from the list.
7. To delete a rule, select **Rule** from the list.
8. Select the item you want to delete and click **Delete**. Confirm the deletion.
9. When done, click **OK**.
10. Select **Yes** to rebuild your system files.

### Customize the Details Menu

Custom Details enables you to customize the Details menu. You can:

- Add custom pages you have created to the Details menu.
- Delete pages from the Details menu.
- Change the order of the pages on the Details menu.
- Place pages in a submenu on the Details menu.

---

**Note:** When you add or delete pages from the menu, Sage HRMS automatically synchronizes the navigation pane to match your menu changes.

---

**To Add a Custom Page to the Menu**

1. From the navigation pane, select **System > Customize Menu**.
2. From the **Product** field drop-down list, select a product.
3. In the **Activity** field drop-down list, select **Details**.
4. Click **Add**. The Customize Details dialog box opens.
5. From the **Details** drop-down list, select the custom page you want to add to the Details menu.

---

**Note:** If you are adding a page to Sage HRMS or Training, only employee custom pages appear in the **Details** drop-down list. If you want to add a button for the page to the Details toolbar, see *Customize the Details Toolbar*

---

6. Click **OK** to save your changes and close the dialog box.
7. Select **Yes** to rebuild your system files.

**To Delete a Page from the Menu**

1. From the navigation pane, select **System > Processes > Customize Menu**.
2. From the **Product** field drop-down list, select a product.
3. In the **Activity** field drop-down list, select **Details**.
4. Select the page you want to delete and click **Delete**. Confirm the deletion.

---

**Note:** When you delete a page, you only remove it from the menu. The page will still appear in any actions that include it as a step.

---

5. Click **OK** to save your changes and close the dialog box.
6. Select **Yes** to rebuild your system files.

**Customize the Reports Menu**

Sage HRMS enables you to customize the Reports menu. You can:

- Create your own report groups and add custom reports.
- Modify a report group.
- Delete a report group.
- Change the order of the report groups and the order of reports within groups on the Reports menu.
- Add report groups to submenus on the Reports menu.



---

**Note:** When you add, modify, or delete report groups on the menu, Sage HRMS automatically synchronizes the navigation pane to match your menu changes.

---

## To Add a Custom Report Group

1. From the navigation pane, select **System > Processes > Customize Menu**.
2. From the **Product** field drop-down list, select a product.
3. In the **Activity** field drop-down list, select **Report**.
4. From the **Group** drop-down list, select **All**. The report groups appear in the list on the right.
5. Click **Add**. The Customize Groups dialog box opens.
  - a. In the **Report Group** field, enter the name of the new group.
  - b. In the **Status Bar Message** text box, enter a message. This message displays in the Status Bar at the bottom of the Sage HRMS page whenever you move the mouse pointer over the report group in the Reports menu. If you enter nothing, the status bar message will default to the name of the report group.
  - c. Click **OK** to save your changes and close the dialog box.
6. From the **Group** drop-down list, select the new report group. The Reports list on the right shows all the reports in the group. Initially, there are none.
7. Click **Add**. The Customize Reports dialog box opens. This dialog box enables you to select any of the reports located in the custom report libraries shipped with Sage HRMS.
8. If you add a report from one of the custom report libraries shipped with Sage HRMS, select the library from the Library drop-down list, then select the report from the Report drop-down list.
9. If you add a report not located in the custom libraries, do not select anything (blank option) from the Library drop-down list, and then select the report from the Report drop-down list.

---

**Tip:** If you want to select a custom report not shipped with Sage HRMS, you must first save the report directly to the appropriate product folder (HR, Attendance, or Training). Open the report in SAP Crystal Reports®, select **Save As** from the File menu, and save the report in the appropriate product folder located in... \Sage\SageHRMSServer\Data\CustomReports.

---

10. Click **OK** to save your changes and close the dialog box.
11. When done, click **OK**.
12. Select **Yes** to rebuild your system files.

## To Modify a Report Group

1. From the navigation pane, select **System > Processes > Customize Menu**.
2. From the Product field drop-down list, select a product.
3. In the Activity field drop-down list, select **Report**.
4. From the Group drop-down list, select **All**. The report groups appear in the list on the right.

5. Select the report group and click **More**. The Customize Groups dialog box opens.

---

**Note:** The only change you can make to a standard Sage HRMS report group is to place it in a submenu. Also, if you change the name of a report group you have created, you must reestablish any security privileges associated with the group, since changing the name of the group is equivalent to deleting it and creating a new one.

---

6. Select the report group from the Group drop-down list. The reports appear in the list on the right.
  - a. To delete a report, select the report and click **Delete**. Confirm the deletion.
  - b. To add a report, click **Add**. The Customize Reports dialog box opens. Enter the report information and click **OK**.
  - c. To edit information about a report, select the report and click **More**. The Customize Reports dialog box opens. Change the report information and click **OK**.

---

**Note:** You can only add or edit reports for a report group you have created.

---

7. When done, click **OK** to save the changes.
8. Select **Yes** to rebuild your system files.

### To Delete a Report Group

1. From the navigation pane, select **System > Processes > Customize Menu**.
2. From the Product field drop-down list, select a product.
3. In the Activity field drop-down list, select **Report**.
4. From the Group drop-down list, select **All**. The report groups appear in the list on the right.
5. Select the report group you want to delete and click **Delete**. Confirm the deletion. You can only delete a report group you have created.
6. When done, click **OK** to save the changes.
7. Select **Yes** to rebuild your system files.

## Customize the Navigation Pane

Sage HRMS allows you to customize which groups, subgroups, and tasks display on the navigation pane. By default, Sage HRMS lists tasks on the navigation pane in alphabetical order; however, you can choose the order in which tasks display for groups and subgroups. This is useful if you use some tasks more frequently than others and want them to display at the top of the list.

### To select which tasks display on the Navigation Pane

1. From the navigation pane, select **System > Processes > Customize Navigation Pane**.
2. Select the group that you want to customize in the **Group** field.
3. Select the subgroup that you want to customize in the **Subgroup** field.

4. Review the current list of tasks in the subgroup in the **Display on the Navigation Pane** field. To change the tasks that display on the navigation pane, do one of the following:
  - Select the task and click **Remove** to remove it and to return it to list of task in the **Not on the Navigation Pane** field.
  - Select a task in the **Not on the Navigation Pane** field then click **Add** to add it to the **Display on the Navigation Pane** field.
5. Click **Apply** to save your changes. To change the tasks for other groups, repeat steps 2-4.
6. Alternately, click **Reset** to reset the list back to the previously saved state.
7. Click **OK** to save your changes and to close the Customize Navigation Pane dialog box.

### To change the order of tasks on the Navigation Pane

1. From the navigation pane, select **System > Processes > Customize Navigation Pane**.
2. Select the group for which you want to change the order of tasks in the **Group** field.
3. Select the subgroup for which you want to change the order of tasks in the **Subgroup** field.
4. Review the current order of the tasks for the group or subgroup in the **Display on the Navigation Pane** field.
5. Select the task that you want to move in the **Display on the Navigation Pane** field.
6. Click **Move Up** or **Move Down** to move the task up or down on the navigation pane.
7. If necessary, click **Reset** to reset the list back to the previously saved state.
8. Click **Apply** to save your changes. To change the order of tasks in other groups, repeat steps 2-6.
9. Click **OK** to save your changes and to close the Customize Navigation Pane dialog box.

### Main Menu synchronization

When you customize the navigation pane, Sage HRMS synchronizes the Main Menu to match the navigation pane. For example, if you remove Skills and Education Reports from the Human Resources subgroup (from the navigation pane, select **Reports > Human Resources > Skills and Education Reports**), Sage HRMS removes Skills and Education Reports from the Main Menu (from the Main Menu, select **Reports > HR > Skills and Education Reports**). Conversely, if you re-add a task to a subgroup, Sage HRMS re-adds the task to the corresponding location on the Main Menu.

## Customize the Employee or Training Toolbar

The Employee Toolbar displays below the Main Menu in the Sage HRMS workspace when you select **Employees > View/Edit Employees**. It consists of several tabs; each containing toolbar buttons that provide you with quick access to employee detail pages. The Training Toolbar displays below the Main Menu in the Sage HRMS workspace when you select **Training > View/Edit Trainee**. It consists of several tabs; each containing toolbar buttons that provide you with quick access to training detail pages. Using Custom Details, you can:

- Add buttons

- Modify the icon or message for a button
- Delete buttons

---

**Note:** If you are using Sage HRMS on a network, make sure all other users log out of Sage HRMS before you begin customizing the Sage HRMS menu. When you have completed your customizations and rebuilt system files, other users can log back on.

---

### To Add a Button to the Employee or Training Toolbar

1. From the navigation pane, select **System > Customize Menu**.
2. Select HR, Payroll, Attendance, or Training in the Product field.
3. Select **Details** in the Activity field.
4. From the Details drop-down list, select the page with which to work to open the Customize Details dialog box.
  - a. Select Display on Employee (or Training) Toolbar to display an icon for the page on the toolbar. You can have a maximum of 9 buttons on the toolbar.
  - b. From the Bitmap drop-down list, select the bitmap you want to appear on the button. The bitmaps for all of the standard Details pages appear in the list. You can also add your own bitmaps.

---

**Tip:** Sample data contains 12 sample bitmaps you can use for Details toolbar buttons. To use these bitmaps in live data, copy the bitmaps (CUST01.BMP, CUST02.BMP, etc.) from the \SAMPLE\CUSTOM subdirectory of your Sage HRMS system to the \DATA subdirectory.

---

- c. Enter a message in the **Status Bar Message** text box. This message displays in the Status Bar at the bottom of the Sage HRMS page whenever you move the mouse pointer over the page in the Details menu. If you enter nothing, the status bar message will default to the name of the page.
  - d. Click **OK** to save your changes and close the dialog box.
5. When done, click **OK**.
  6. Select **Yes** to rebuild your system files.

### To Modify a Button on the Employee or Training Toolbar

1. From the navigation pane, select **System > Customize Menu**.
2. Select HR, Payroll, Attendance, or Training in the **Product** field.
3. Select Details in the **Activity** field.
4. From the **Details** drop-down list, select the page you want to modify. The Customize Details page opens.
  - a. To the bitmap associated with the button, select a different one from the list. You can also use your own bitmaps.

- b. To modify the message, enter or delete text in the Status Bar Message text box as needed.
  - c. Click **OK** to save your changes and close the dialog box.
5. When done, click **OK**.
6. Select **Yes** to rebuild your system files.

### To Delete a Button on the Employee or Training Toolbar

1. From the navigation pane, select **System > Customize Menu**.
2. Select HR, Payroll, Attendance, or Training in the **Product** field.
3. Select Details in the **Activity** field.
4. From the **Details** drop-down list, select the page you want to delete.
5. On the **Customize Details** page, clear the **Display on Employee (or Training) Toolbar** check box.
  - a. Click **OK** to save your changes and close the dialog box.
  - b. When done, click **OK**.
6. Select **Yes** to rebuild your system files.

## Customize the Quick Launch Toolbar

The Quick Launch toolbar has buttons that enable you to launch the Sage HRMS products or external programs, such as Microsoft Office applications. Using Custom Details, you can:

- Add buttons and program icons
- Modify the buttons and icons
- Change the order of the buttons
- Delete buttons

---

**Note:** If you are using Sage HRMS on a network, make sure all other users log out of Sage HRMS before you begin customizing the Sage HRMS menu. When you have completed your customizations and rebuilt system files, other users can log on to the system.

---

### To Add a Button to the Quick Launch Toolbar

1. From the navigation pane, select **System > Customize Menu**.
2. From the **Product** field drop-down list, select **System**.
3. In the **Activity** field drop-down list, select **Quick Launch Toolbar**.
4. From the **Button** drop-down list, select **All**. All the buttons on the toolbar are displayed in the list on the right.
5. Click **Add**. The **Customize Buttons** dialog box opens.
6. In the **Button** field, enter the name of the new button.
7. Click **OK** to save your changes.

8. From the **Button** drop-down list, select the new button. Note that initially there are no icons listed in the **Icons** list box.
9. To add an icon to launch a program, click **Add**. The Customize dialog box opens.
10. In the **Title** field, enter the title of the icon.
11. From the **Bitmap** drop-down list, select a bitmap for the icon. You can also use your own bitmaps.
12. Click the **More** button to open a file selection dialog box.
13. In the **Program** field, locate and select the \*.EXE file for the program you want the icon to launch. Click **OK**.
14. In the **Parameters** field, enter any parameters needed to call the program, if applicable.
15. Click **OK** to save your changes.
16. Continue adding icons as necessary.
17. When done adding icons, click **OK** to save your changes.
18. Select **Yes** to rebuild your system files.

### To Modify a Button on the Quick Launch Toolbar

1. From the navigation pane, select **System > Processes > Customize Menu**.
2. From the **Product** field drop-down list, select **System**.
3. In the **Activity** field drop-down list, select **Quick Launch Toolbar**.
4. From the **Button** drop-down list, select **All**. All the buttons on the toolbar are displayed in the list on the right.
5. You can now modify the button and the associated program icons.
6. To change the name of a button:
  - a. Select the button from the **Buttons** list box and click **More**. The Customize Buttons dialog box opens.
  - b. Make the change and click **OK**.

---

**Note:** You can change only the name of a custom button, not a Sage HRMS standard button.

---
7. To add an additional program icon:
  - a. Select the button from the **Button** drop-down list. The icons appear in the list on the right.
  - b. Click **Add**.
  - c. Enter the icon information (title, bitmap, program, parameters) and click **OK**.
8. To delete a program icon:
  - a. Select the button from the **Button** drop-down list. The icons appear in the list on the right.
  - b. Select the icon and click **Delete**. Confirm the deletion.
9. To modify a program icon:

- a. Select the button from the **Button** drop-down list. The icons appear in the list on the right.
  - b. Select the icon and click **More**.
  - c. Change the icon information and click **OK**.
10. When done, click **OK** to save your changes.
  11. Select **Yes** to rebuild your system files.

### To Change the Order of Buttons on the Quick Launch Toolbar

1. From the navigation pane, select **System > Processes > Customize Menu**
2. From the Product field drop-down list, select **System**.
3. In the Activity field drop-down list, select **Quick Launch Toolbar**.
4. From the Button drop-down list, select **All**.
5. Click the button next to the item to move and drag the item to the new location.
6. When you are finished, click **OK** to save your changes.
7. Select **Yes** to rebuild your system files.

### To Delete a Button on the Quick Launch Toolbar

1. From the navigation pane, select **System > Processes > Customize Menu**.
2. From the **Product** field drop-down list, select **System**.
3. In the **Activity** field drop-down list, select **Quick Launch Toolbar**.
4. From the **Button** drop-down list, select **All**.
5. Select the button from the list and click **Delete**. Confirm the deletion.
6. Click **OK** to save your changes
7. Select **Yes** to rebuild your system files.

## Change the Order of Items on a Menu

Custom Details enables you to change the order of items on the Sage HRMS menus. You can change the order of the following:

- Actions and steps within actions
- Processes, Analyses, Rules, and Pages
- Report groups and reports within the groups

### To Change the Order of Items on a Menu

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
2. From the **Product** field drop-down list, select a product, for example, HR.
3. In the **Activity** field drop-down list, select an activity, for example Details.

4. In the list box on the right, click the button next to the item you wish to move and drag the item to the new location. Continue moving items as needed.
5. When you are finished, click **OK** to save your changes.
6. Select Yes to rebuild your system files.

---

**Note:** When you change the order of items on the Details menu, the order of the buttons on the Details toolbar changes accordingly.

---

## Add Borders to a Menu

You can add borders to any menu or submenu in Sage HRMS. If you no longer need it, it's easy to delete the border.

For example, let's say you changed the order of the actions in the Sage HRMS Train actions menu so that class actions appear below the other actions. You can add a border between the class actions and the other actions, so that the division is more apparent.

### To Add a Border to a Menu

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
2. From the **Product** field drop-down list, select the product, for example HR.
3. From the **Activity** field drop-down list, select the activity, for example Rules.
4. If you are adding a border to a submenu, select the submenu from the **Submenu** drop-down list; otherwise select nothing (blank) for the submenu.
5. In the **Borders** field, enter the number of borders you want to add. For example, to add a single border, enter **1** in the **Borders** field; to add five borders, enter **5**. A border, indicated by a line and a number, appears at the bottom of the list of tasks.
6. Click the button next to the border and drag it where you want the border to appear in the menu
7. When done, click **OK** to save your changes,
8. Select **Yes** to rebuild your system files.

### To Delete a Border from a Menu

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
2. From the **Product** field drop-down list, select the product, for example HR.
3. From the **Activity** field drop-down list, select the activity, for example Rules.
4. If you are deleting a border from a submenu, select the submenu from the **Submenu** drop-down list; otherwise select nothing (blank) for the submenu.
5. Select the border and click **Delete**.
6. Confirm the deletion.
7. When done, click **OK** to save your changes.
8. Select **Yes** to rebuild your system files.



## Add a Submenu to a Menu

Custom Details enables you to add submenus to the standard menus.

Submenus do not appear in the Organizer or on the Security Group page. In these locations, items that are placed in a submenu will appear together in the location normally occupied by the submenu.

### To Add a Submenu

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
2. From the **Product** field drop-down list, select a product.
3. From the **Activity** field drop-down list, select an activity.
4. From the **Submenu** field drop-down list, select **All**. All the submenus defined for the menu appear in the list on the right.
5. Click **Add**. The Customize Submenu dialog box opens.
6. In the **Submenu** field, enter a name.
7. Enter a message in the **Status Bar Message** field. This message will display in the Status Bar at the bottom of the Sage HRMS page whenever you move the mouse pointer over the submenu in the main menu. If you enter nothing, the status bar message will default to the name of the submenu.
8. Click **OK** to save your changes.
9. You can now add items to the submenu.
10. When done, click **OK**.
11. Select **Yes** to rebuild your system files.

### To Add an Item to a Submenu

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
2. From the **Product** field drop-down list, select a product.
3. From the **Activity** field drop-down list, select an activity.
4. If you are adding an action or a report group to a submenu, select **All** from the **Action** or the **Group** drop-down list.
5. From the list box on the right, select the item you want to add to the submenu and click **More**. A dialog box opens.
  - a. From the **Submenu** drop-down list, select the submenu.
  - b. Click **OK** to save your changes.
6. When done adding items, click **OK**.
7. Select **Yes** to rebuild your system files.

### To Delete an Item from a Submenu

---

**Note:** You are only deleting the item from the menu, not from the system.

---

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.

2. From the **Product** field drop-down list, select a product.
  3. From the **Activity** field drop-down list, select an activity. If you are editing an action or report submenu, select All from the Actions or Group drop-down list.
  4. From the Submenu drop-down list, select the submenu you want to edit.
  5. Select the item and click **Delete**. Confirm the deletion.
  6. Select **Yes** to rebuild your system files.
- 

**Note:** When you delete an item from a submenu, you are removing it from both the submenu and from Sage HRMS. If you merely want to move the item from the submenu without deleting it, use the steps described in the preceding section, To Add an Existing Task to a Submenu, but select nothing (blank) for the submenu.

---

### To Delete a Submenu

1. From the navigation pane, select **System > Customize Menu**. The Customize Menu page opens.
  2. From the Product field drop-down list, select a product.
  3. From the Activity field drop-down list, select an activity.
  4. If you are working with action or reports, select All from the Actions or Group drop-down list.
  5. From the Submenu drop-down list, select All. The submenus are displayed on the right.
  6. Select the submenu and click Delete. Confirm the deletion.
- 

**Note:** When you delete a submenu, the items in the submenu are not deleted. They are returned to the main menu.

---

7. Click OK to save your changes.
8. Select Yes to rebuild your system files.

## Copy Menu Customizations

If you have created your menu customizations in sample data, you can copy them to live data.

---

**Note:** When you perform this procedure, any menu customizations you have created in live data will be replaced with the ones you have created in sample data.

---

### To Copy Menu Customizations

1. Log out from Sage HRMS.
2. Using the Windows Explorer, locate your Sage HRMS system. Open the SAMPLE folder, and then open the CUSTOM folder.
3. Select all the files located within the **CUSTOM** folder. From the Explorer menu, select **Edit**, then **Copy**.
4. Open the **DATA** folder in your Sage HRMS system, and then open the **CUSTOM** folder.
5. From the Explorer menu, select **Edit/Paste**. When the system asks whether you want to replace existing files, select **Yes To All**.
6. Log on to Sage HRMS.
7. From the navigation pane, select **Setup > Rebuild System Files**. Click **Yes**. When the process is complete, you are returned to the Logon page.
8. Log back on to live data and you will see the menu customizations that you created in sample data.

---

**Note:** You can also copy menu customizations from live data to sample data. Copy all the files in the \DATA folder of your Sage HRMS system to the \SAMPLE\CUSTOM folder using the same steps described above.

---

## Remove Customizations

You have the following options for removing customizations you have created.

- You can restore specific items deleted from the standard Sage HRMS menu.
- You can manually remove your changes, much the same way you created them.

### To Restore Menu Items

If you have deleted specific items (actions, steps in actions, report groups, reports in report groups, and pages) from the standard Sage HRMS menus, you can restore them.

1. From the navigation pane, select **System > Customize Menu**.
2. From the Product field drop-down list, select the product, for example HR.
3. From the Activity field drop-down list, select the activity, for example Rules.
4. When the list of items appears on the right, the Restore button becomes enabled.

5. If you are restoring a step in an action or a report in a report group, select the action from the Action drop-down list or the report group from the Group drop-down list.
6. Click **Restore**. The Restore dialog box opens, displaying the items you have deleted.
7. Select the **Restore** check box.
8. Click **OK** to save your changes and close the dialog box.
9. When done, click **OK**.
10. Click **Yes** to rebuild your system files.

---

**Note:** When you delete an item, the security privileges assigned to that item are also deleted. Therefore, when you restore an item that you previously deleted, you need to reestablish access rights for that task.

---

### **To Manually Remove Customizations**

If you want to remove specific customizations you have created (such as adding your own action, changing the order of items on a menu, etc.), you can manually reverse these changes, much the same way you created them.

- If you added your own action, you can delete it.
- If you changed the order of the pages on the Details menu, you can change the order back.

# Setting Up Security for Custom Details

---

If you customize your Sage HRMS system, you must make sure that users have access to the custom pages, code tables, actions.

- To give users access to the custom pages or custom code tables created using Custom Details, you must update the group security information for these tasks.
- To give users access to new actions, report groups or other items you add to the Sage HRMS menus, update the group security using the same steps used to define access for any standard task in the system.
- If necessary, you must also update security information to allow access to the Custom Details databases using SAP Crystal Reports®.

---

**Note:** Sage HRMS automatically updates the security access for the MASTER user ID.

---

## Define Security for Custom Pages

When updating the group security information from the Security Group page, define whether the group has permission to access custom pages.

1. From the navigation pane, select **Setup > Group Security**. The Security Groups dialog box opens.
2. Select a security group from the list.
3. Select the appropriate **Employer**.
4. Select the appropriate Product (**HR** or **Training**).
5. For the **Activity**, select **Detail**.
6. For the **Task**, select **Custom Details**.
7. For the **Step**, select **Custom Details** and click **Modify**. The list of custom pages opens.
8. Select **Custom Details** and double-click to change the **Allow Access** column to Update.

---

**Note:** To use any of the custom pages, you must allow the group access to Custom Details.

---

9. To allow the group to access individual pages, select each page and double-click to change **Allow Access to Update or View**.
  - a. **Update** allows users to both view and update the pages.
  - b. **View** allows users to view but not update the pages.
10. Click **OK** when you finish.

## Define Security for Custom Code Tables

When updating the group security information from the Security Group page, define whether the group has permission to access the custom, user-defined code tables.

1. From the navigation pane, select **Setup > Group Security**. The Security Groups dialog box opens.
2. Select a security group from the list.
3. Select the appropriate employer.
4. Select the appropriate product (**HR, Attendance, or Training**).
5. For the **Activity**, select **Rule**.
6. For the **Task**, select **User-Defined Codes**.
7. For the **Step**, select **User-Defined Codes** and click **Modify**.
8. To enable the group to access any of the user-defined code tables, double-click to set **Access to Yes**.
9. Click **OK**.

## Define Access to SAP Crystal Reports®

When updating the group security information, define the appropriate SAP Crystal Reports® access level. This access level determines what fields the group can access when using SAP Crystal Reports®.

---

**Note:** You must define the appropriate security levels for the Custom Details databases before updating the group security information.

---

1. From the navigation pane, select **System > Group Security**. The Security Groups dialog box opens.
2. Select a security group from the list.
3. Select the appropriate **Employer**.
4. Select the appropriate **Product (HR or Training)**.
5. For the **Activity**, select **Detail**.
6. For the **Task**, select **Crystal**.
7. For the **Step**, select **SAP Crystal Reports®** and click **Modify**.
8. Select **SAP Crystal Reports®** and double-click to change the **Allow Access** column to **Yes**.
9. Click **OK** when you finish.

### Custom Databases

The following lists the file name of each custom database file. Using SAP Crystal Reports® for Sage, you can access the custom page databases and create your own reports to review and use your information.

---

**Note:** The database structure for these files vary based on the custom fields you have added for your custom pages.

---

**HRTKPERS (TKPE)**

Employee Custom Detail Data

Seq	Field Name	Type	Length	Dec	Description
1	U_COMPANY	C	3	0	Employer Code
2	U_EMPNO	C	9	0	Employee ID
3	U_CHADATE	D	8	0	Change Date

**TKFIELD (TKFLD)**

Custom Detail Field Definitions

Seq	Field Name	Type	Length	Dec	Description
1	D_ALIAS	C	8	0	Field Alias
2	D_CHGLEVEL	C	10	0	Change Level
3	D_DEC	N	3	0	Decimal Places
4	D_DESC	C	40	0	Field Description
5	D_DOSCOMP	C	3	0	DOS Company Code
6	D_FIELD	C	10	0	Field Name
7	D_FILE	C	8	0	File Name
8	D_FORMULA	M	10	0	Formula
9	D_LEN	N	3	0	Field Length
10	D_LEVEL	N	2	0	RR Security Level
11	D_MASSUP	L	1	0	Mass Updateable
12	D_OBJTYPE	C	1	0	Object Type
13	D_ORDER	N	2	0	Order

Seq	Field Name	Type	Length	Dec	Description
14	D_PANEL	C	30	0	Related Page
15	D_SECNAME	C	8	0	Secondary Alias Name
16	D_TABLE	C	2	0	Table ID
17	D_TABNAME	C	25	0	Table Name
18	D_TYPE	C	1	0	Field Type
19	D_WIDTH	N	4	0	Font Width

## TKSCREEN (TKSCR)

### Custom Detail Screen Definitions

Seq	Field Name	Type	Length	Dec	Description
1	S_ALIAS	C	8	0	Field Alias
2	S_COL	C	10	0	Column Position
3	S_DOSCOMP	C	3	0	DOS Company Code
4	S_FIELD	C	10	0	Field Name
5	S_LBLLEFT	N	3	0	Left Position of Label
6	S_NAME	C	25	0	Page Name
7	S_OBJLEFT	N	3	0	Left Position of Object
8	S_OBJTYPE	C	1	0	Object Type
9	S_OBJWIDTH	N	3	0	Object Width
10	S_PAGE	N	1	0	Page Number
11	S_PANTYPE	C	2	0	Type of Page
12	S_REQUIRED	C	1	0	Required Field
13	S_ROW	C	1	0	Row Position



Seq	Field Name	Type	Length	Dec	Description
14	S_SECURITY	C	10	0	Security Setting
15	S_TITLE	C	20	0	Field Title
16	S_VALIDATE	C	1	0	User Defined Function Call

### TKMULXXX (TKMULXXX)

Custom Detail (Detail Name) Data

Seq	Field Name	Type	Length	Dec	Description
1	U_COMPANY	C	3	0	Employer Code
2	U_EMPNO	C	9	0	Employee ID

**Note:** The TKMULXXX files relate to multi-record pages only. The number of multi-record custom page databases varies based on the number of multi-record pages you create. You can create up to 999 multi-record pages, thus the name of the database file can be TKMUL001 to TKMUL999. The database file description includes the name of the page.

The database structure for all TKMULXXX files varies based on the custom fields you have added to your Employee, Applicant or Requisition multi-record custom pages.

# Reference Material

---

## Custom Details Database File List

The following table lists the file name and a short description of each database file. The files are listed alphabetically by file name. Using SAP Crystal Reports®, you can access the custom page databases and create your own reports to review and use your information.

<b>File</b>	<b>Description and Alias</b>
HRTKPERS	Employee Custom Detail Data (TKPE)
TKFIELD	Custom Detail Field Definitions (TKFLD)
TKSCREEN	Custom Detail Screen Definitions (TKSCR)
TKTABLES	User Defined Table Definitions (TKTAB)
TKMULXXX	Custom Detail (Detail Name) Data (TKMULXXX)