

Sage HRMS

Getting Started Guide

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Chapter 1: Introduction

This guide provides an overview for setting up and using Sage HRMS.

Note: See the [Sage HRMS Installation Guide](#) for information about installing Sage HRMS for the first time or upgrading Sage HRMS from prior quarterly releases.

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!

- **Online Help:** Click  or press **F1** within in the product to open the online help for the window you are viewing. From within the help, you can click the **Contents** tab (on the left side of the window) to explore a variety of topics, click the **Index** tab to look for topics related to a particular keyword, or use the search box (in the upper right corner of the window) by typing a particular word or phrase and clicking  to search for topics containing that text.
- **Product Documents:** Access this and other documents from the [Sage HRMS Product Documents](#) website.
- **Community Hub:** Visit the online community at https://communityhub.sage.com/us/sage_hrms/ for blogs, tips, and guidance for your Sage programs.
- **Sage Knowledgebase:** Search the [Sage Knowledgebase](#), which provides 24/7 access to support articles as well as the latest software downloads and updates.
- **Customer Support:** For other support resources, visit the [Sage Support Resource Centre](#) page, select your country, and then select your product.

- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **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 program, you are ready to start Sage HRMS and use the program's features.

To start Sage HRMS:

1. Click **Start** and select **All Programs > Sage > Sage HRMS Client > Sage HRMS Client**.
2. On the **Logon** page, log on using one of the following methods:
 - To log on with Windows Authentication, select the **Windows Logon** check box, and then enter your Windows account username and password. Be sure to include the domain in the **Username** (for example, *FLSAGE\lizp*, where *FLSAGE* is the domain and *lizp* is the username).
 - To log on as the MASTER user, clear the **Windows Logon** check box and enter the logon information for the MASTER user.
3. Select the database to use—either **Sample Data** or **Live Data**. See [Selecting the database](#).

Tip: If you also installed Sage HRMS Link, you can log on to Sage HRMS Link right from the logon page.

4. If you want to update system files before logging on to Sage HRMS, press **Ctrl + U**.
5. Click **Logon**.

Selecting the database

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 enables you to familiarize yourself with entering data and using features without adversely affecting your company's production (or live) data.
- 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.

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.

Switching between databases

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.

Using the initialization file

Sage HRMS provides the Sage HRMS initialization file (ABRAWIN.INI) 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 the directories for the live data, sample data, temp file directory, and export directory.

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

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.

Rebuilding system files

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

There may be times, such as after a power failure, when you will need to rebuild the 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.

Chapter 3: Navigating Sage HRMS

Accessing tasks and processes in Sage HRMS

You can use the following items to access the tasks, processes, and features you need to manage your human resources:

- **Navigation pane:** Use the navigation pane on the left side of the Sage HRMS window to navigate to tasks and processes for each function. For details, see ["Using the navigation pane" \(page 7\)](#).
- **Main menu:** Although this menu is hidden by default, you can choose to display this menu at the top of the page. The main menu provides menus for each action. For details, see ["Using the main menu" \(page 8\)](#).

Using the navigation pane

The navigation pane is on the left side of your Sage HRMS desktop. It provides 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 need to select items in the following order.

1. **Group** near the bottom of the navigation pane, such as Employees, Time Off, Training, and Reports
2. **Subgroup** near the top of the navigation pane. You don't have to click on a subgroup to access the corresponding menu items, but you can scroll or expand/collapse the list of menu items in a subgroup by pressing  or .
3. **Menu item** in the subgroup.

Using the main menu

This legacy menu appears near the top of the Sage HRMS window. It 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 that includes activities relating to the entire system rather than an individual feature.

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

Displaying or hiding the main menu

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

1. Select **⚙ (Settings) > User Preferences**.
2. On the **User Preferences** page, either:
 - Select the **Display Main Menu** check box to show the main menu.
 - Clear the **Display Main Menu** check box to hide the main menu.
3. Click **OK**.
4. When prompted to [rebuild your system files](#), click **Yes**.

Moving around in a page

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

Use	Result
Tab	Move forward from an item to the next item on the page (left to right and top to bottom).
Shift + Tab	Move from an item to the previous item on the page (right to left and bottom to top).
↓ ↑ → ←	Move the selection cursor from item to item or within an item .

Use	Result
Mouse	Place the selection cursor in an item or text box.

Using tabs

Many pages contain two or more tabs. Each tab contains different items. For example, the **Demographics** page contains several tabs, including:

- **Address and Phone** tab that contains the employee's address, phone numbers, and email addresses.
- **Personal** tab that contains the employee's personal information, such as their name, birth date, marital status, and gender.
- **Photo** tab that contains the employee's photograph.

To move to another tab, either:

- Click the tab label. For example, click the **Personal** tab label to view the **Personal** tab.
- 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.

Selecting from a drop-down list

A drop-down list 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 lists the actions used to open and select items from a drop-down list. Make sure you highlight the drop-down list on which you want to work before you perform the following actions.

Action	Result
Press the spacebar on your keyboard.	Open an unopened list or close

Action	Result
	an opened list.
Type the first letter of the item, or press ↑ or ↓ to find the item.	Select the item.
Using your mouse, click the arrow on the right side of the drop-down list.	Open the list.
Using your mouse, click the item in an open list.	Select the item.
Using your mouse, click outside the open list.	Close the list.

Entering text in a text box

You can type text in a text box. There is a limit to the number of characters you can type, which is defined in the Data Dictionary. The following figures show empty and filled text boxes.

Empty	Filled
Salutation <input type="text"/>	Salutation <input type="text" value="Mr"/>

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, see your Sage HRMS Link manual.

The following table describes the actions to use to enter or delete information in a text box.

Action	Result
Type characters up to the maximum for that item.	Enter information in a blank text box.
Click and drag the mouse over the characters to highlight; then type new characters up to the maximum for that item.	Replace information in a text box.
Click and drag the mouse over the characters to highlight and	Delete all

Action	Result
press Delete .	characters in a text box.
Place the cursor to the left of the character to delete and press Delete .	Delete one character in a text box.
Place the cursor to the right of the insertion point and type.	Insert characters in a text box.

Entering 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 slashes between the month and day are automatically included.

To enter the date, either:

- **Type the date:** First highlight the box. Then type two digits for the month, two digits for the day, and four digits for the year. For example, typed **02/01/2020** for February 1, 2020.
- **Use the calendar:** Click the right mouse button to display the calendar, then click a date on the calendar. The current date is circled in red. The selected date is highlighted in gray.

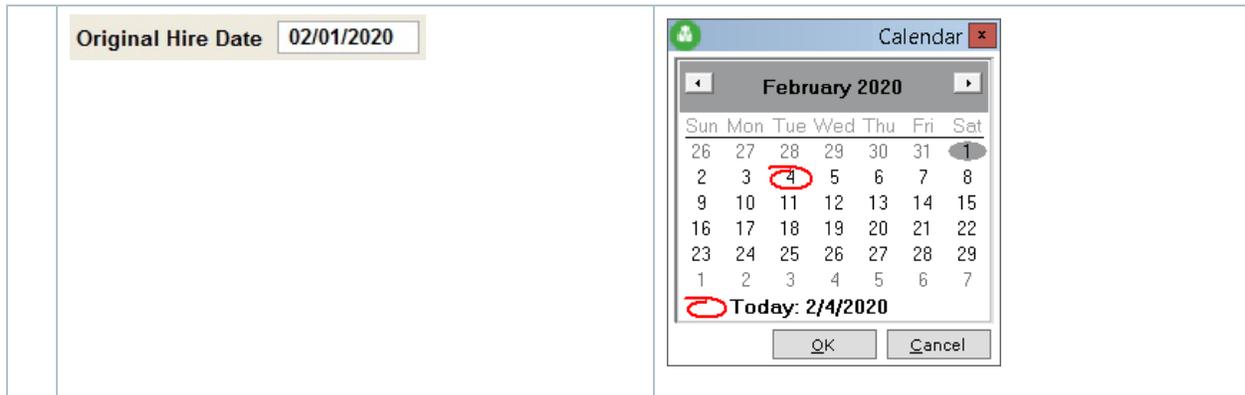
To move to the previous or next month, click the arrows in the top left or top right of the calendar—or click on the month to display a list all months within the year, then select the month from the list.

To move to the previous or next year, click the year and use the arrows to move to the year.

To return to the current day, click **Today** at the bottom of the calendar.

If needed, click **OK** to close the calendar. The date you selected appears in the date text box

The following figure shows a date text box and the calendar.



To change an existing date, right-click the text box to display the calendar, or highlight the date and either:

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

Closing and resizing pages

To close a page, click **X** (the Close icon) in the top right-hand corner of the page.

If you made changes, the program asks whether you want to save your changes.

- Click **Yes** to save your changes and close the page.
- Click **No** to close the page without saving your changes.

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

Accessing context-sensitive help

To open the online help:

- In the upper-right corner of the Sage HRMS window, click **?** (the Help icon) and select **Search Help**.
- In the upper-right corner of any window, click **?** (the context-sensitive Help icon) or click **F1** to open the help topic related to that window or feature.

Using shortcut keys

Sage HRMS is designed to be used with a mouse to point to select items and click buttons on the page. However, you can instead use shortcut key combinations on your keyboard. Sage HRMS uses the Microsoft Windows-standard for mouse-equivalent keystrokes.

Accessing main menu items

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

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

The following table shows the shortcut keys to use to select various menu items.

Key combination	Menu item selected
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
Alt + H	Help

After you select a main menu item, you can use the following keys:

- 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 selection and return to the task where 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

Press the **Tab** key to move from one item to another within a page or window. For example, as you perform 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.

You can also press and hold down **Shift** and press **Tab** to move backwards one item.

This feature is particularly useful when you are working on a page that contains many items. 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 key combinations to cut, copy, and paste selected text.

The following table shows the shortcut keys to use for various features.

Key combination	Feature
Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste

Key combination	Feature
Ctrl + G	Employee Quick Find
Ctrl + F	Employee Advanced Find

Accessing pages

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 in the program.

Key combination	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

Finding an employee

You must select an employee before you can view details and perform tasks. You can use the Employee Find feature to search for an employee by last and first name, ID, status, or social security number.

Tip: Press **Ctrl+G** on your keyboard to open the **Quick Find** window to search by first name, last name, or employee ID only. You can enter the first few letters or digits of the employee name or ID, and then select from the list of matches. If you type the complete name or ID and press **Enter**, you automatically select the first employee who matches what you typed.

To find an employee:

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

Tip: You can instead press **Ctrl+F** on your keyboard or click the **Advanced Find** link on an employee page.

2. On the **Employee Find** page, enter values in the search criteria in the upper part of the page; see "[Search criteria on the Employee Find page](#)" (page 17) for more information. You can click the **More Options** link to enter additional criteria to use in the search; see "[More Options search criteria on the Employee Find page](#)" (page 17) for more information. (Click the **More Options** link a second time to hide the additional criteria.)

As you type the values in the search criteria, the search results table in the lower part of the page changes to display the matching employees, or closest matching employees.

Tip: You can click a column in the search results table to sort the table by that column.

3. After you find the employee, either:

- Double click the employee in the table.
- Select the employee in the table and click **OK**.

That employee's page opens.

Search criteria on the Employee Find page

The following table shows the search criteria on the **Employee Find** page.

Criteria	Description
Last Name	Type a value to search by the last name. When searching by Last Name and First Name, Last Name acts as a "go to" feature navigating to the matching name on the list.
First Name	Type a value to search by the first name. When searching by Last Name and First Name, First Name acts as filter, narrowing the search to employees with that First Name.
ID	Type the employee number.
SSN/SIN	Select SSN or SIN , and then type the social security number or social insurance number.
<input checked="" type="checkbox"/> Active	Select this check box to include active employees.
<input checked="" type="checkbox"/> Terminated	Select this check box to include terminated employees.
<input checked="" type="checkbox"/> LOA	Select this check box to include employees on leave of absence.
<input checked="" type="checkbox"/> Other	Select this check box to include other statuses like COBRA dependents, or non-employees.
More Options	Click this link to display additional search criteria; see the next section for details. If you click More Options again, the additional search criteria are hidden.

More Options search criteria on the Employee Find page

Note: If you collapse the **More Options** area (hide the additional search criteria), the search criteria are saved for the next time you open the area. However, when the area is collapsed, the additional search criteria is not used to find employees.

The following table shows the search criteria in the **More Options** area on the **Employee Find** page.

Criteria	Description
Organization Levels (1- 5)	<p>Search for an employee in a particular organization. The organization levels were set up and defined in Enterprise Setup.</p> <p>Select All to include employees in all of that organization level in the search results.</p> <p>Select None Specified to only include employees not assigned to any organization at that level.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: If an organization at a level is not defined, the label display as None.</p> </div>
Manager	<p>Search for an employee who has a particular manager. If an employer is selected in the Employer filter, only managers for the selected employer are available. If the Enterprise is selected, all managers in the system are available.</p> <p>Select All to include employees with any manager in the search results.</p> <p>Select None Specified to only include employees not assigned a primary manager.</p>
Employee Type	<p>Search for an employee of a particular employee type.</p> <p>Select All to include employees of all types in the search results.</p>
Salaried/Hourly	<p>Search for an employee who has either the salaried and hourly status.</p> <p>Select All to include both salaried and hourly employees in the search results.</p>
Job Title	<p>Search for an employee by job title by the following methods:</p> <ul style="list-style-type: none"> • Choose Contains and type specific characters to include employees whose job title contains those characters. • Choose Exact and select a specific job title from the drop-down list.
State/Province	<p>Search for an employee by state or province. Choose State or</p>

Criteria	Description
	Province , and then select the state or province from the drop-down list.
Last Hire Date	Search for an employee who has a last hire date on a particular date or in a date range. Select a "From" and/or "To" date using the calendar icons.

Navigating through a list of employees

You can use the following arrow buttons under an employee's name to quickly move to the detail page of the first, previous, next, or last employee in the list of employees from your search.



Using the Organizer and Scheduler

About the Organizer and Scheduler

Use the Organizer to view tasks and information items scheduled for you. It is your own personal Organizer—all scheduled tasks and information items are yours.

The Organizer includes the Scheduler, which enables you to plan tasks for yourself or someone else.

To open the Organizer, select **Connected Services > Sage HRMS Tools > Organizer**.

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

When the Organizer first opens, it displays:

- The calendar showing the current date in the current month.
- The Task list
- The Information list
- The System Event list.

These lists display all tasks, messages, and events scheduled for the current date. You can use the lists to schedule and track tasks. You can also record information and plan system events. All uncompleted activities and information are rolled over from day to day.

Moving around in the calendar

Use the following methods to move around the calendar.

- To jump to the current date, click the **Jump to Today** 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, then select the month from the list.

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, then select the year from the list.

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

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

Using Organizer toolbar buttons

The Organizer toolbar, located just below 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	Action
Execute a Task	<p>Select a task description, and then click this button to start the task.</p> <div data-bbox="354 541 1421 604" style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px;"> <p>Tip: 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, for the Record New Hire task, the Add New Employee page opens for you to enter the name of the new employee. For the Assign Leave of Absence task, a list of the steps displays so you can select the Complete check box for a completed step—or select the Schedule check box and click OK to proceed to that step.</p>
Jump to Today	Click this button to quickly jump to the current date.
Add	Click this button to open the Scheduler so you can schedule a new task, information item, or system event.
Delete	<p>Select a task, information item, or system event, and then click this button to delete a task, information item, or system event. As a precaution, the system asks you to confirm the deletion.</p> <div data-bbox="354 1283 1421 1398" style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px;"> <p>Note: A system event can only be deleted by the user for whom it is scheduled.</p> </div>
Edit	<p>Select a task or information item, and then click this button to open the Scheduler so you can change it.</p> <div data-bbox="354 1514 1421 1629" style="border: 1px solid #0070C0; border-radius: 5px; padding: 5px;"> <p>Note: A system event can only be edited by the user for whom it is scheduled.</p> </div>
Refresh	<p>Click this button any time you want to refresh your Organizer.</p> <p>The system frequently refreshes your Organizer and brings it up to date with items other users might have scheduled for you.</p>

Using the Organizer lists

Consider the Organizer list as 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:

- The Task list
- The Information list
- The System Event list

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. When you complete the scheduled task, the **Completed** check box is automatically selected by the system—or you can manually select the check box.

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

Action	Steps
Start a Task	Either click the task and then click the Execute a Task button—or double-click the task.
Edit a Task	Either click the task and click the Edit Item in Scheduler button—or click the + button next to the task. In the Scheduler, change the information as necessary.
Delete a Task	Either click the task, click the Delete Item in Scheduler button, and confirm the deletion—or click the + button next to the task, click Delete in the Scheduler, and confirm the deletion.

Action	Steps
Display the task's Note page	Right-click the task, edit the information as necessary on the Notes page, and then 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.
Manually change status to Completed	Either select the Completed check box –or click the task, click the Edit button, and then select the This Item is Complete check box in the Scheduler. Note: For many tasks, the system detects when the task is complete and automatically selects the Completed check box.
Change status to not completed	Either clear the Completed check box–or click the task, click the Edit button, and clear the This Item is Complete check box in the Scheduler. Note: You can only clear a Completed check box for tasks completed on the current day. When viewing past dates, you cannot change the status to not completed.

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** check box indicates the completion status. However, the system cannot detect whether or not an information item is complete. You must manually change an information item's status.

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

Action	Steps
Edit an Information Item	Either click the information item and click the Edit Item in Scheduler button—or click the + button next to the information item. In the Scheduler, change the information as necessary.
Delete an Information Item	Either click the information item, click the Delete Item in Scheduler button, and confirm the deletion—or click the + button next to the information item, click Delete in the Scheduler, and confirm the deletion.
Display the item's Note page	Right-click the information item, edit the information as necessary on the Notes page, and then 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	Either select the Completed check box – or click the information item, click the Edit button, and then select the This Item is Complete check box in the Scheduler.
Change status to not completed	Either clear the Completed check box—or click the information item, click the Edit button, and clear the This Item is Complete check box in the Scheduler.

Using 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—any Action, Process, Analysis, Report, Rule, or Detail.

You can also schedule an information item as a system event. 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.

Action	Steps
<p>Edit a system event</p>	<p>Either click the system event and click the Edit Item in Scheduler button—or click the + button next to the information item.</p> <p>In the Scheduler, change the information as necessary.</p> <div data-bbox="451 411 1419 522" style="border: 1px solid #ccc; padding: 5px;"> <p>Note: Only the user for whom the system event is scheduled can edit it.</p> </div>
<p>Delete a system event</p>	<p>Either click the system event, click the Delete Item in Scheduler button, and confirm the deletion—or click the + button next to the system event, click Delete in the Scheduler, and confirm the deletion.</p> <div data-bbox="451 695 1419 806" style="border: 1px solid #ccc; padding: 5px;"> <p>Note: Only the user for whom the system event is scheduled can delete it.</p> </div>
<p>Display the system event's Note page</p>	<p>Right-click the system event, edit the information as necessary on the Notes page, and then click OK to save your changes and return to the Organizer.</p> <p>You can also edit Notes in the Scheduler.</p>
<p>See items that extend beyond the list</p>	<p>Use the vertical and horizontal scroll bars.</p>

Using 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.

To schedule a task or information item

1. With the Organizer open, click **Add** on the Organizer toolbar.
2. In the **Scheduler** window, select the type of item you are scheduling—either **Task** or **Information**.
3. If you are scheduling a task, select the **Activity** containing the task.

Example: To schedule the Mass Update task, select **Process**. To schedule the Rehire Employee task, select **Action**.

4. If you are scheduling a task, select the **Product** from the list of all Sage HRMS products as well as **System** (for activities pertaining to your entire system rather than an individual product).
5. For **To Be Done**, enter the date on which the item is scheduled for completion in mm/dd/yyyy format. For example, enter March 27, 2025 as 03272025; (dashes are automatically shown). The item appears on the Organizer on this date.

Note: The **Scheduled** date is the date that this item was added and cannot be changed.

6. Make additional selections or enter additional information about the task or information item.

Item	Description
Task	<p>Select the task you are scheduling from the list. The items in the list change depending on the activity and product you selected.</p> <p>Note: This item is only available if you are scheduling a task.</p>
Sub-Task	<p>For some tasks (such as reports and rules), select the sub-task to specify another level within the task.</p> <p>Note: This item is only available if you are scheduling a task that has sub-tasks.</p>
Employer	<p>For most tasks, you must 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 to have the performance review.</p> <p>Note: This item is only available if you are scheduling a task AND if there is more than one employer set up in your enterprise.</p>
Subject	<p>If required by the task, select a subject from the list. The items in the list change depending on the task you selected. For example, the Rehire Employee task requires an employee's name for Subject.</p> <p>Note: This item is only available if you are scheduling a task.</p>
Description	<p>For tasks, displays a short description of the task, but you can change it. If you leave it blank, the system fills it in for you.</p> <p>For an information item, enter displays a short description.</p> <p>This description appears on the Organizer of the user for whom the</p>

Item	Description
	item is scheduled.
Frequency	<p>Select how many times the item should occur. The list includes Once, Daily, Weekly, Bi-Weekly, Monthly, Bi-Monthly, Quarterly, and Yearly. For example, you might want to archive terminated employees once a month.</p> <p>If you select a frequency other than Once, the Repeating Task window automatically opens for you to describe the task's repeat frequency. See About repeating items.</p>
Priority	<p>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.</p>
<input type="checkbox"/> Task has been completed	<p>This check box is not selected while adding the item. Select this check box when the item is completed. The system automatically selects the check box when certain tasks are completed.</p>
Notes	<p>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.</p> <p>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.</p>
Scheduled By	<p>Displays the name of the user who added the item to the schedule and cannot be changed.</p>
Scheduled For	<p>Select the user who should perform the item; this item will be placed in his or her Organizer. The list contains users who are set up for your system. For a task, only the users who have security rights to perform that task appear in the list. For more information, see "User security" (page 77).</p>

7. Click **OK** to save the new item and add it to the Task or Information list in the Organizer for the assigned user (specified in **Scheduled For**).

About 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 March 18. Lynn does not complete the task on March 18 and does not log in again until March 23. The task rolls over to March 23 on her Organizer. It will continue to roll over until she either completes or deletes the task.

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

About repeating items

If the task or information item has a **Frequency** other than **Once**, the **Repeating Task** window automatically opens for you to specify details about the item's repeat frequency. You then click **OK** to return to the **Scheduler** window.

Item	Description
Task Information	Displays the Description of the item from the Scheduler window.
Scheduled Date	Displays the To Be Done date for the item from the Scheduler window.
Repeat Frequency	Displays the Frequency of the item from the Scheduler window.
Repeat this Item	Select the number of times to repeat this item in addition to the first date scheduled. For example, if you type 3 for an item scheduled weekly for 4/2, the Organizer shows the item on 4/2 (the first occurrence), 4/9, 4/16, and 4/23. Note: For a daily repeat frequency, you can repeat the item up to 365 times. For other repeat frequencies, you can repeat the item as many times as required up to a five year limit. If you type a number exceeding the limit, the number automatically changes to the 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.

Item	Description
<input type="checkbox"/> Maintain Day of Week as	<p>(Available for monthly, bimonthly, quarterly, or yearly repeating items)</p> <p>Clear the check box if you always want to repeat the item on the same numerical date of the month. For example, if you schedule a monthly repeating item for 3/15, the Organizer shows the item on 3/15 (the first occurrence), 4/15, 5/15, and so on (regardless of the day of the week).</p> <p>If you always want to repeat the item on a particular day of the week, select this check box, select the day from the list, and select one of the following options (which determines the date when the recurring date does not fall on the specified day of the week):</p> <ul style="list-style-type: none"> • Move to Closest Date: the closest date that matches the specified day of the week. • Forward to Next Available Date: the following date that matches the specified day of the week. • Backward to Last Available Date: the previous date that matches the specified day of the week. <div style="border: 1px solid green; padding: 10px; margin-top: 10px;"> <p>Example: You set up a monthly repeating item that you want always on Tuesday starting May 14, 2019. Because June 14 falls on a Friday, the Organizer shows the item on the following dates in June, depending on your selection:</p> <ul style="list-style-type: none"> • If you selected Move to Closest Date, Tuesday June 11, which is three days from June 14. • If you selected Forward to Next Available Date, Tuesday June 18. • If you selected Backward to Last Available Date, Tuesday June 12. </div> <div style="border: 1px solid gray; padding: 10px; margin-top: 10px;"> <p>Note: The Maintain Day of Week check box is automatically selected when the repeat frequency is weekly or biweekly; it is automatically cleared when the frequency is daily.</p> </div>

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** on the Scheduler is disabled. If you find you need to change the repeat frequency of an item that is already scheduled to repeat, instead of trying to edit the item, schedule a new item and its related repeat frequency. Then, delete the old item.

To schedule a task in Microsoft Outlook

When you schedule a task in the Scheduler, you can also have it scheduled in Outlook. To do this, open the **User Preferences** page and select the **Automatically schedule tasks in Microsoft Outlook** check box on the **General Preferences** tab. See [Setting user preferences"Opening the User Preferences page" \(page 37\)](#).

When the task is added to the Scheduler, 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.

When 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.

To schedule a System Event

A System Event pertains to all users on the system—so it is automatically placed in the **System Event** list in every Sage HRMS user's Organizer. This enables you to communicate with all other users on the system about the event.

You schedule a System Event like you schedule a task except you select **System Event** for **Priority** in the **Scheduler** window

Example 1: 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.

In the Scheduler, you add a task with the Mass Update process, set the **Priority** to **System Event**, set **To Be Done** to 12/5, and enter the following message in the **Notes** area:

Mass Update will occur at 5:00 today, December 5. Please exit Sage HRMS by 4:55 p.m.

- The Mass Update process appears on everyone's Organizer in the **System Event** section on December 5. Users can view the note by clicking the + button next to the item to open the scheduler, or by right-clicking the item to open the **Notes** window.
- The Mass Update process task *only* appears in the **Task** section of the person scheduled to complete it.

Example 2: You routinely perform email maintenance every Friday at 5:30 p.m. and want all users to exit email before you begin maintenance work.

Since this is not a system task, you add an information item, set the **Frequency** to **Weekly** and **Fridays**, set the **Priority** to **System Event**, and enter the following message in the **Notes** area:

Please exit email by 5:30 today for weekly maintenance.

The information item is placed on everyone's Organizer in the **System Event** section on Fridays. Users can view the note by clicking the + button next to the item to open the scheduler, or by right-clicking the item to open the **Notes** window.

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

Marking an item as complete

The **Task has been completed** check box in the lower left corner of the **Scheduler** window indicates whether the item is complete.

This 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.

To signify the item is complete, edit the item and manually select this check box in the **Scheduler** window. When you click **OK** to return to the Organizer, the item's **Completed** check box is selected.

If you are editing a task you have completed, the system automatically selects the **Complete** check box. When you click **OK** to return to the Organizer, the item's **Completed** check box is selected.

Chapter 4: Setup checklists

Sage HRMS setup checklist

Before you begin using Sage HRMS, perform these setup steps to set up your company and customize the system to your company's requirements.

Step 1: [Set up the enterprise "Setting up the enterprise" \(page 42\)](#)

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.

Step 2: [Set up the audit trail for the enterprise "To set up the audit trail" \(page 48\)](#)

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.

Step 3: [Set up employers "Setting up employers" \(page 50\)](#)

You must add an employer to the system, including its name and address as you want it to appear on reports. You can also define the way your employer pays most of its employees, including the frequency and units.

For each Sage HRMS module you are using (Sage HRMS and Time Off), you must define unique parameters for each employer you add to your system.

Step 4: [Set up code tables "Setting up code tables" \(page 56\)](#)

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.

Step 5: Set up benefits

Sage HRMS uses the guidelines you define for employee benefits. For example, set up your employer's insurance and savings plan, as well as any rate tables used by the plans.

Step 6: [Set up security "About security" \(page 63\)](#)

The system provides an extensive, flexible, and easy-to-use security system to help you protect your data. The security system breaks out functions by product, employer, activity, task, and step. You establish security limits and privileges for all system users by assembling users in security groups and establishing passwords for each user.

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

Time Off setup checklist

Time Off uses the information 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 ["Sage HRMS setup checklist" \(page 34\)](#), perform the following steps before using Time Off.

Step 1: Set up employers for Time Off

Specify some general information about the plans, such as the units used to track absences and the fiscal year start

Step 2: Set up attendance plans

Set up attendance plans with a type (such as vacation or sick leave), a calculation method, a [reason code](#), and other information required to track time off.

If you have Sage HRMS Payroll, you can configure Time Off to use rules and data from Sage HRMS Payroll (such as time worked) to calculate available hours, maximum carryover hours, and total carryover hours for attendance plans.

Step 3: Enroll employees

Enroll employees into the attendance plans on the employee's **Attendance Summary** page. Include the 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 user preferences

Sage HRMS enables 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.

Opening the User Preferences page

In the top-right corner of Sage HRMS, Click the down arrow next to  (the Settings icon) and select **User Preferences** to open the **User Preferences** page, which contains two tabs: **General Preferences** and **Setup Interviews**.

Tabs on the User Preferences page

General Preferences tab

Item	Description
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 after you log on, select Do not show me this page again on the Welcome to Sage HRMS page.
Employees Toolbar	Select the employee-related page you want to automatically open when you log on to Sage HRMS.

Item	Description
Default	<p>The choices in the list include only the pages to which you have security access. If you select a page that the system administrator later restricts 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.</p>
Training Toolbar Default	<p>Select the training-related page you want to automatically open when you log on to Sage HRMS.</p> <p>The choices in the list include only the pages to which you have security access. If you select a page that the system administrator later restricts 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.</p> <div data-bbox="483 982 1414 1094" style="border: 1px solid #ccc; padding: 5px;"> <p>Note: This item only displays if you have Sage HRMS Train installed.</p> </div>
HR Employer Default	<p>From the list of all employers that are set up in your HR program, select Enterprise or the employer to use 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 HR Employer Default is Dunedin Enterprises, the data used in the processes will be for employer Dunedin Enterprises.</p>
U.S. Payroll Employer Default	<p>From the list of all U.S. Payroll employers that are set up in your system (with the assigned Payroll Database ID), select the employer to use 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 U.S. Payroll Employer Default is US/ABC, the data used in the payroll processes will be for employer US/ABC.</p>

Item	Description
Canadian Payroll Employer Default	<p>From the list of all Canadian Payroll employers that are set up in your system (with the assigned Payroll Database ID), select the employer to use 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 U.S. Payroll Employer Default is Can/ABC, the data used in the payroll processes will be for employer Can/ABC.</p>
Employee Benefit Plans Default	<p>Select which benefit plans you want displayed initially on the employee's Insurance Benefits page and Savings Benefits pages when these pages are opened.</p> <ul style="list-style-type: none"> • Show All Benefit Plans (even ones that expired) (This is the default.) • Show Current Plans Only
Default Employee Status Selection	<p>Select the check boxes for each employee status you want included by default when you use the Employee Find function. Usually, all check boxes are selected—so the Employee Find function searches through all employees, regardless of their status. However, if you select Active and clear all other status selections, the Employee Find function only searches through employees with a status of Active.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Note: You can override the Employee Status Selection by changing the status selections directly on the Employee Find page.</p> </div>
<input type="checkbox"/> Display Main Menu	<p>Select this check box to display the main menu at the top of the program. To hide the main menu, clear the check box. See "Using the main menu" (page 8) for more information.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Note: If you change this item, Sage HRMS must be restarted to take effect.</p> </div>
<input type="checkbox"/>	<p>Select this check box if you want all tasks listed in Scheduler to be</p>

Item	Description
Automatically schedule tasks in Microsoft Outlook	<p>communicated through Microsoft Outlook to the assigned user.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: You must enter an email address for the assigned user in User Security for this feature to work.</p> </div>
<input type="checkbox"/> I want to opt out...	Select one or both check boxes if you do not want to participate in either the Product Enhancement or Product Survey programs.

Setup Interviews tab

Use this tab to enable or disable setup interviews when you perform [Insurance Plan Setup](#) and the [Savings Plan Setup](#). A *setup interview* is a wizard that walks you through the specific steps for these plans. If you enable a setup interview, the next time you choose **Setup > Employees > Insurance Plans** or **Setup > Employees > Savings Plans** and click the **Add** button, Sage HRMS asks if you want to use the setup Interview.

Chapter 6: Enterprise setup

About enterprise setup

Before adding employers, you must set up the enterprise. The Sage HRMS enterprise feature lets you handle a group of employers as one. 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. Although it is not an employer, it appears in the list of employers on your system.

The enterprise has no employees. The employees are associated with their 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 specifications for each employer.

The enterprise feature helps you in two ways:

- It is a time saver when setting up standards for all employers in your system, such as code tables and benefit plans. You can manipulate the data from several employers at one time instead of working with individual employers on identical tasks one at a time.
- It provides a panoramic view. The information from *all* your employers is available when you are viewing data or printing reports.

Enterprise saves time

The enterprise feature saves you time when setting up and managing multiple employers.

Example: You have an umbrella corporation called National Systems, with three subsidiary employers called Corporation A, Corporation B, and Corporation C. The umbrella company (National Systems) and its three subsidiaries all have the same benefit plans.

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 employers, 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—creating a unique benefit plan for this employer without having to create it from scratch.

The enterprise also efficiently handles changes to your setup. 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 changing it 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 provides a panoramic view

Use the enterprise feature to see a panoramic view of information in Sage HRMS. When you print a report and select the enterprise, 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 access data for all employers in the system.

Setting up the enterprise

To set up the enterprise:

1. Select **Setup > System > Setup > Enterprise Setup**.
2. On the **Enterprise Setup** page, enter information about the enterprise on the six tabs :
 - [Enterprise Options tab](#)
 - [Organization Titles tab](#)
 - [Logo Setup tab](#)

- [Audit Trail Setup tab](#)
- [User-Defined Code Table Titles tab](#)
- [Customize Logon tab](#)

3. After you specify the enterprise setup information, either:

- Click **OK** to accept your changes and close the **Enterprise Setup** page.
- Click **Apply** to save your changes but remain on the page. You can then enter additional settings on the various tabs.

Enterprise Options tab

Use this tab of the **Enterprise Setup** page to specify general setup information for your enterprise.

Item	Description
Country	<p>The first time Sage HRMS is started, select the country that represents the employers in your enterprise:</p> <ul style="list-style-type: none"> • U.S. if all employers in the enterprise are United States employers. • Canada if all employers in the enterprise are Canadian employers. • Both if there are both United States <i>and</i> Canadian employers in the enterprise. <p>The country setting determines what information is displayed in your Sage HRMS system. If a page or a particular item on a page does not apply for a country, it either does not display or it is disabled.</p> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>Note: If you later 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 exit Sage HRMS, log on again, change the country setting to Both, and make any other needed changes.</p> </div>
Enterprise	Enter the name of the enterprise, which is shown on reports and

Item	Description
Name	forms
Address	Enter one or two lines of the street address of the enterprise.
City	Enter the city of the enterprise.
State or Province	(Required) Select State/Province, and then select the state or province for the enterprise's address.
ZIP/postal code	Enter the ZIP or postal code for the enterprise's address.
Phone	Enter the telephone number for the enterprise.
Training Employer	<p>If you are using Sage HRMS Train, you can select a Training Employer.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: If you are not using Sage HRMS Train, this item is disabled</p> </div>
Federal Tax ID/Business Number	Enter either the Federal Tax Identification number (U.S.) or Business Number (Canada) for the enterprise.
Rename Pager Field to	If the enterprise companies do not use pagers, you can rename the Pager field (that appears on the employee's Demographics page) to store another phone number, such as Empl Cell . (Maximum of 12 characters)
Phone Number Format	Choose the format for displaying employee telephone numbers.
SSN/SIN Masking Format	Choose the format that the social security number or social insurance number will appear on pages. You can select to display the entire number (123-45-6789), mask the entire number (XXX-XX-XXXX), or mask all except the last four digits (XXX-XX-6789)
Report Footer	Choose whether to display both the date and time or only the date in the footer at the bottom of each report page.
Show SSN/SIN on	Choose whether to show the employee's social security number or social insurance number in the top section of each employee's

Item	Description
Detail Headers	Detail page.
Show Union Data	Choose whether to show an employee's union affiliation.
Benefit History	Choose whether to enable or disable storing historical benefit information for employees.
Automatically Recalculate Benefits	<p>Choose when to automatically recalculate benefits for employees:</p> <ul style="list-style-type: none"> • Daily. Updates benefits only when the user logs into Sage HRMS—but not update benefits when the user changes Employee pages. • By Employee. Updates benefits only when a user makes changes on Employee pages that trigger Sage HRMS to update benefits—but not update benefits when the user logs into Sage HRMS. • Daily and By Employee. Updates 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. Does not automatically update benefits. (You must manually update them.) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Tip: When setting up your system, select Daily or Never to prevent the system from updating after every change.</p> </div>
Show Inactive Codes	<p>Employer and enterprise job codes, organization codes, and reason codes can be set to active or inactive. For Show Inactive Codes:</p> <ul style="list-style-type: none"> • Choose No to hide inactive codes in the list of codes, so they are not available for selection and assignment to an employee. • Choose Yes, to show inactive as well as active codes in the list of codes available for selection and assignment to an employee.
Populate Payroll History	Choose whether to automatically update Sage Employee Self Service Payroll History during the Check Print process in Sage

Item	Description
	HRMS Payroll. If your enterprise does not use Sage ESS, choose No . <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Note: This is only available if Sage HRMS Payroll is installed. </div>

Organization Titles tab

Use this tab of the **Enterprise Setup** page to enter titles for one to five organization levels for your enterprise. These levels organize the employers for your employees.

After specifying the organization titles, set up the codes for each organization in the Organization code tables.

Example: An employer has organization level 1 titled "Division" (which has a Central division code) and level 2 titled "Department" (which has a Marketing department code). Richard Miller accepts a marketing position with the Central division at this employer. When you add him as a new employee, you specify his division as Central and his department as Marketing.

Logo Setup tab

Use this tab of the **Enterprise Setup** page to select a picture file to use as a logo. This logo can be used along with the name and address of the employer on Sage HRMS reports.

Note: The logo must be a bitmap file (with the .BMP extension). You can create a bitmap file from scratch using a graphic editing program, such as Microsoft Paint—or scan the 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 on the Logo Setup tab

1. Click **Select**.
2. In the **Open Picture** window, navigate to the logo file and highlight it.
3. Click **Select**.

The logo image displays on the **Logo Setup** tab.

To remove a logo from the Logo Setup tab

Click **Remove**. This removes the logo from the Sage HRMS database, but not from your disk. You can select the file again any time you want.

Audit Trail Setup tab

Use this tab of the **Enterprise Setup** page to set up an audit trail that tracks changes a user makes with a task or to a page. This is an extremely useful tool for safeguarding Sage HRMS data. The audit trail provides a before and after image of changes. It also keeps track of the date and time as well as the user who made the change. 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 following [audit trail reports](#) are available to monitor the audit trail. To access the audit trail reports, select **Reports > System > Audit Trail Reports**.

- **Audit Trail Report by User:** Lists audit trail records sorted by the users who implemented the changes.
- **Audit Trail Report by Date:** Lists audit trail records sorted by the date on which the changes were made.
- **Audit Trail Report by File/Field:** Lists audit trail records sorted by the files and fields in which the changes were made.

To set up the audit trail

1. On this tab for **Enable Auditing**, select **Yes**. This enables the rest of the items on the tab.

Note: Turning the Audit Trail on or off does not affect the existing audit status of the 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 previous audit statistics are maintained.

2. For **Select File to Audit**, scroll through the list of database files, and then select a database file containing the fields you want to audit.

The table on the lower portion of the page changes to display the fields in the selected database file.

3. To have the system audit the selected database file, select the **Enable File Audit** check box. Otherwise, clear the check box.

The database file name is preceded by a **Yes** (the file will be audited) or **No** (the file will not be audited), depending on the check box setting.

4. If you selected to audit the database file, specify the fields to audit.
 - To audit all fields in the selected database file, select **Yes** for **Audit All Fields in File**. A check appears in the **Audit** column for each field in the table.
 - To disable auditing of all fields in the selected database file, select **No** for **Audit All Fields in File**. The check is removed from the **Audit** column for each field in the table.
 - To enable or disable auditing individual fields in the selected database file, select or clear the check box in the **Audit** column for each field in the table.

Note: Although you can select to audit any editable field in a database file, the system only audits the field if the database file is also selected to be audited. For example, you select the **Audit** column for the **Performance Review Rating Code** field in the **Employee Personnel** database file. However, if the **Enable File Audit** check box is cleared for this database file. Thus, the system will not audit the **Performance Review Rating** field (or *any* field in the **Employee Personnel** file).

5. Repeat steps 2 - 4 for each database file and field that you want audited.
6. When finished, either:
 - a. Click **OK** to save your changes and close the page.
 - b. Click **Apply** to save your changes and remain on the page.

User-Defined Code Table Titles tab

Use this tab of the **Enterprise Setup** page to specify the titles for your user-defined code tables as well as titles for three character fields and three numeric fields.

Customize Logon tab

Use this tab of the **Enterprise Setup** page to specify the message to display on the Sage HRMS Logon window. The message can contain no more than 254 alpha-numeric characters. You can:

- Edit the message.
- Click **Clear** and type a custom message.
- Click **Reset** to restore the standard logon message.

Chapter 7: Employer setup

Setting up employers

After setting up your enterprise in Sage HRMS, set up your employers.

You can have as many employers as you like. Each of the employers can have different specifications, such as different codes for jobs in the company, or different salary grade structures.

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.

If you have Sage HRMS Payroll (either the U.S. or Canadian version), you must set up a SQL database before you add an employer. For detailed instructions to set up and configure payroll, review the **Sage HRMS Payroll Getting Started Guide** on the [Product Documents website](#).

After the SQL database is set up for Payroll, you can follow these steps to add a Payroll employer in Sage HRMS.

To add an employer

1. Select **Setup > System > Setup > Add Employer**.
2. On the **Steps for Add Employer Task** page, select the **Add Employer** step (a required step) and other steps depending on the products installed. For each step, you can select either:
 - **Complete** to perform that step now.
 - **Schedule** to perform that step later (by you or another user).

3. Click **OK**.
4. On the **Employer Setup** page, make selections or enter information about the employer as shown in the following table.

Item	Description
Employers Country	<p>Select the country where this employer does business—either Canada or United States,</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: This is only available if your enterprise is configured to support companies in both countries.</p> </div>
Employer Code	Enter a three-character alphanumeric employer code to uniquely identify the employer.
Employer Name	Enter the name of the employer, which appears at the top of pages and prints on most reports. (Required)
Address	Enter the employer's street address.
City	Enter the employer's city. (Required)
State / Province	Select the employer's state or province. (Required)
Zip / Postal Code	Enter the employer's ZIP or postal code. (Required)
Phone	Enter the phone number for the employer.
Fax	Enter the fax number for the employer.
Pay Frequency	<p>Select the pay frequency used for the majority of the employees.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: When you add a new employee, this is initially used for the employee's pay frequency but you can change it.</p> </div>
Normal Units	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

Item	Description
	<p>week, enter 75.00.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: When you add a new employee, this is initially used for the employee's normal units but you can change it.</p> </div>
Language	Select the employer's primary language.
Industrial Sector	(Canada only) Select the industrial sector for the employer, which is used for Canadian Employment Equity reporting.
Payroll Database ID	<p>If payroll is installed, Sage HRMS automatically uses the Employer Code for this ID.</p> <p>If payroll is not installed but you link to Sage 300 Payroll, enter the ID for that database.</p>
Payroll DB Name	<p>If payroll is installed, enter the name of the SQL payroll database.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note: When you click OK, Sage HRMS verifies that the database is present and automatically creates a company profile in the database. You will see a series of "Activating Application" messages indicating the progress of the activation.</p> </div>

5. When you are finished, click **OK**.
6. When you see a message that the process was successful, click **OK** to restart your system.

Modifying employers

After employers are set up, you can make changes when needed.

To modify an employer

1. Select **Setup > System > Setup > Modify Employer**.
2. If there is more than one employer, select the employer to modify and click **OK**.
3. On the **Employer Setup** page, make your changes.

Notes:

- You cannot change the **Employer's Country** or **Employer Code**.
- If you are using Sage HRMS Payroll, the **Payroll Database ID** is the ID for the payroll database that was created in SQL Enterprise Manager.

4. Click **OK** to save your changes.
5. When you see a message that the Modify Employer process was successful, click **OK** to restart your system.

Deleting an employer

You can delete an employer in your Sage HRMS system, such as an employer you added by mistake.

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, this procedure only deletes the employee information from the Sage HRMS databases, not from the payroll databases.

The system provides two options to delete an employer:

To delete an employer

1. Select **Setup > System > Setup > Delete Employer**.
2. Select the employer you want to delete.
3. Select the appropriate option for deleting the employer information.
 - Retain the security and employer setup information (but delete the employee information)
 - Delete all employer data, including employee information, security options, and employer setup information.
4. Click **OK** to proceed with deleting the employer.
5. When the system asks you to confirm the deletion, click **Yes** to delete the employer.

6. When you see a message that the Delete Employer process was successful, click **OK** to restart your system.

Chapter 8: Setting up code tables

About code tables

Sage HRMS uses codes to provide abbreviated, standard references to specific information. These codes are stored in code tables with their associated descriptions.

Example: There is a code table for state and province abbreviations. Instead of typing the name of the state or province (such as Mississippi or British Columbia), users select the appropriate code (MS or BC) from a list of these codes.

Advantages of using code tables

Code tables provide several benefits:

- **Save time.** When you enter information for hundreds of employees, it is much easier and more efficient to type or select the code instead of typing the full selection. For example, you can select **RFT** for the employee type instead of typing **Regular Full Time**.
- **Customize information to meet your company's needs.** You can set up codes specific to your company, such as divisions, departments, and locations.
- **Ensure accuracy and consistency.** Without a uniform coding scheme, users could be inconsistent with their entries. For example, data entry clerks might enter the Engineering Department as **ENGDEPT**, **ENGRDEPT**, **ENG**, or **ENGR**—and Sage HRMS would interpret these as four different departments and would not be able to calculate department totals accurately. However, with a department code table, a clerk could select **ENG** from the list.

About creating code tables

Most code tables in Sage HRMS are two-column tables with codes in the left column and brief descriptions in the right column. Some tables are more complex (such as benefit

plans) and contain information in additional columns. The instructions for copying, adding, editing, and deleting codes are identical, whether you work with two-column or multi-column tables.

The code tables that are already set up in Sage HRMS are enterprise-level code tables. You can edit 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 for an employer, the table area is blank—that individual employer uses the codes from the enterprise code table. As soon as you add a new code for the employer code table, the program recognizes that 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, we recommend that you first copy the enterprise code table to the employer code table, and then add the unique code to the employer's code table.

Example: Two of three employers use the same codes.

First, edit the enterprise code tables to accommodate the two employers who share common codes. These two employers will automatically use the enterprise codes.

For the third employer (who uses a slightly different set of codes), first copy the enterprise code table and then make the changes necessary to meet the third employer's coding requirements. 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

You can easily copy, add, edit, and delete codes to meet each employer's specific coding requirements.

Note: After you save a code, you cannot change the:

- Benefit Rate Tables
- Benefit Savings Plans

- Attendance Plans
- Absence Reason Codes
- FMLA Event Reason Codes

To copy codes from the enterprise code table

1. In the upper-right corner of the page, choose **Enterprise**.
2. Select one of the following menu items:
 - **Setup > Employees > Code Tables > *code table name***
 - **Setup > Canadian Employees > Code Tables > *code table name***
 - **Setup > Time Off > Code Tables > *code table name***
 - **Setup > Payroll > Code Tables > *code table name***
 - **Setup > Canadian Payroll > Code Tables > *code table name***
 - **Setup > Training > Code Tables > *code table name***
3. On the code page for the enterprise for **Employer**, select the employer whose codes you want to create by copying an existing code table.
4. Click **Copy**.
5. Select **Enterprise** or the employer whose codes you want to copy, and then click **OK**.

Note: Only the employers with codes set up for this type of code table appear in the selection list. The employer you selected in step 3 does not appear in the list because you cannot copy codes from an employer to itself.

6. For most code tables, the **Select Codes to Copy** page opens. The **Available** list shows all the codes set up for that code table.

Highlight a code in the **Available** list and click **Select >** (or double-click the code) to add it to the **Selected** list, which shows the codes you want to copy. If you want to remove a code from the **Selected** list, highlight it and click **Remove**.

Note: When copying some codes, you may see a window informing you of the related codes that will be updated to correspond with those you are

copying. Click **Yes** to continue or click **No** to return to the **Select Codes to Copy** page.

7. When the **Selected** list contains all the codes you want to copy, click **OK**.

The program checks to see if the codes to be copied are the same as any that already exist for the employer receiving them. If there are duplicates, Sage HRMS asks whether you want the old code to be overwritten with the new. You then click **Yes** or **No**.
8. The page then shows the code table for this employer with the codes that you copied. Review the codes and make any changes.
9. When you are finished with the codes, click **X** (the close page button).

To add a code to a code table

1. Select one of the following menu items:
 - **Setup > Employees > Code Tables > *code table name***
 - **Setup > Canadian Employees > Code Tables > *code table name***
 - **Setup > Time Off > Code Tables > *code table name***
 - **Setup > Payroll > Code Tables > *code table name***
 - **Setup > Canadian Payroll > Code Tables > *code table name***
 - **Setup > Training > Code Tables > *code table name***
2. For **Employer**, select the employer (or Enterprise) whose code table you want to change.
3. On the code page for this employer, review the table that shows the codes already established for this employer.

Note: If the table is blank, this employer uses the enterprise-level code table. If you want to continue to have those codes but add another code, first copy the enterprise-level code table.

4. To add a new code, click **Add**.
5. On the **Codes Detail** page for the new code, enter the code and description.

Note: Some code tables contain a blank code with a **Description of None Specified**. This enables users to leave the code blank when entering information. To provide this option, include a blank code along with the **None Specified** description .

6. If applicable, select or enter other information.

For example, for Job, Organization, and Reason codes, select a code **Status** of **Active** or **Inactive**. When the code is active, it displays in the code selection list 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.

7. 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.

8. On the code page for this employer, the code you added is now included in the table. Review the codes and make any other changes.
9. When you are finished with the codes, click **X** (the close page button).

To edit a code in a code table

Note: Codes in the Benefit Rate Tables, Benefit Savings Plans, Attendance Plans, Absence Reason Codes, and FMLA Event Reason Codes tables cannot be changed. If you need to change a code name in one of these tables, create a new code table and delete the old one.

1. Select one of the following menu items:
 - **Setup > Employees > Code Tables > *code table name***
 - **Setup > Canadian Employees > Code Tables > *code table name***
 - **Setup > Time Off > Code Tables > *code table name***
 - **Setup > Payroll > Code Tables > *code table name***
 - **Setup > Canadian Payroll > Code Tables > *code table name***
 - **Setup > Training > Code Tables > *code table name***
2. For **Employer**, select the employer (or Enterprise) whose code table you want to change.
3. On the code page for this employer, review the table that shows the codes for this employer.
4. To change a code, highlight the code and click **More**
5. On the **Codes Detail** page for that code, make your changes and click **OK**.
6. On the code page for this employer, the code you changed is now updated in the table. Review the codes and make any other changes.
7. When you are finished with the codes, click **X** (the close page button).

To delete a code in a code table

1. Select one of the following menu items:
 - **Setup > Employees > Code Tables > *code table name***
 - **Setup > Canadian Employees > Code Tables > *code table name***

- **Setup > Time Off > Code Tables > *code table name***
 - **Setup > Payroll > Code Tables > *code table name***
 - **Setup > Canadian Payroll > Code Tables > *code table name***
 - **Setup > Training > Code Tables > *code table name***
2. For **Employer**, select the employer (or Enterprise) whose code table you want to change.
 3. On the code page for this employer, review the table that shows the codes for this employer.
 4. To delete a code, highlight the code and click **Delete**
 5. When Sage HRMS prompts you to confirm the deletion, either click **Yes** to delete the code or click **No** to cancel the deletion.

Note: Deleting a code could affect history files and reports that contain that code.

6. On the code page for this employer, the code you deleted is no longer in the table. Review the codes and make any other changes.
7. When you are finished with the codes, click **X** (the close page button).

Adding codes while on a Details page

When a Details page contains a drop-down list, that list displays codes from a code table. For example, on the **Current Job** page, the **Change Reason** drop-down list uses the Reason Codes table.

Several of these drop-down lists contain the **Add New Code** option (at the bottom of the list), so you can easily add a new code while you are entering information on the page.

Note: You cannot use this method to add codes to the Benefit Insurance Plans, Benefit Savings Plans, and Benefit Rate Tables.

To add a code while on a Detail page

1. Open the drop-down list that references the code table you want to update.
2. Scroll to the bottom of the list and select **Add New Code**.
3. On the **Add Code** page, enter the information for the new code and click **OK**.

Sage HRMS adds the code to the list and selects the new code from the drop-down list.

Chapter 9: Setting up security

About security

Sage HRMS has an extensive, flexible, and easy-to-use security system to protect your data. The security system breaks down functions within Sage HRMS by employer, product, activity, task, step, and groups of employees so you can precisely restrict access.

Usually an organization's system administrator has access to all security options—and can set up and change security privileges for all Sage HRMS system users. For example, the system administrator can allow one user to access all employee information except current pay data and allow another user to enter only demographic information for new employees.

Each normal user is assigned a username and password, which establishes that user's ability to view, change, and process data. In this capacity, they are limited to changing their own password.

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 concepts

Each person accessing Sage HRMS has a username—and each username is associated with a password.

You can create groups of users and then establish the access rights for that group, so you do not have to set the access rights separately for each user in the group.

The system administrator (with the MASTER user ID) automatically has access to all functions.

Note: When Sage HRMS is updated to include new features, the MASTER user ID is automatically updated and always has access to all features. You must update any existing security groups if you want to provide them access to the new features. This provides a safeguard so you can decide who can access the new features.

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). The system administrator assigns access rights to the group and not to individual users. The group a user belongs to determines his or her access rights.

See "[Group security](#)" (page 65).

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 be assigned to the security group:

- With their Sage HRMS username and password.
- With their Windows logon and password.

See "[User security](#)" (page 77).

Before you start

Before setting up access rights for your users, you must set up the following components in your Sage HRMS system.

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

Determine if you need security

You do not need to set up security for your Sage HRMS system if there is no need to restrict any portion of the system. Neither of the following situations require any security setup:

- You are the system administrator and you are the only one using Sage HRMS. 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. Instead of setting up any security, have each user log on using MASTER as the user ID. Each user can access the entire system.

Establish access rights

Set up security and establish access rights if you want to restrict any portion of the Sage HRMS system to certain users.

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

User #1 can only enter new employees into the system. User #2 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 user security

If you must further restrict your users and disallow access to specific employee information, see ["Product group filters" \(page 73\)](#).

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). Later, the system administrator assigns users (other than the system administrator) to the group. The system administrator assigns access rights to the group (not to each individual user). The group a user belongs to determines their access rights. (The system administrator automatically has access to all functions.)

Security levels

The system administrator can set up security for a group to enable or restrict access at the following levels:

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

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

Access rights to products depend on the products installed 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 Reports and Secure Query. This access level determines which fields in the Sage HRMS system databases the security group's users are able to access when they use Crystal Reports or Secure Query. See ["Ad Hoc Reporting Security" \(page 81\)](#).

Note: When Sage HRMS is updated to include new features, the MASTER user ID is automatically updated and always has access to all features. You must update any existing security groups if you want to provide them access to the new features. This provides a safeguard so you can decide who can access the new features.

Creating and managing security groups

To add a security group

1. Select **Setup > System > Security > Group Security**.
2. The **Security Groups** page contains a table with the existing security groups.

To add a new group, click **Add**.

3. For **New Group Name**, enter the name of the group you are adding (no more than 20 alphanumeric), click **OK**, and click **Yes** to verify you are adding the security group.
4. On the **Security Group** page for the new group, the **Group Level Security** tab initially has no entries in any of the columns because the new group has no access rights. Specify the access rights for the employer level:
 - a. Click **Modify** at the bottom of the **Employer** column.
 - b. In the **Employer Selection** window, the **Allow Access** column for each employer is initially set to **No**. Double-click the employer to change the access to **Yes**.

Note: If you want to enable access to **System** (in the **Product** column), change the access for the **N/A** row to **Yes**.

- c. Click **OK** to save your selections. The system rebuilds the information on the **Security Group** page.
5. On the **Security Group** page, specify the access rights of each employer for the product level:
 - a. Highlight the employer (in the **Employer** column).
 - b. Click **Modify** at the bottom of the **Product** column.
 - c. In the **Product Selection** window, the **Allow Access** column for each product is initially set to **Yes**. If you want to disable access, double-click the product to change the access to **No**.

Note: If you have both U.S. Payroll and Canadian Payroll installed and want to restrict access for this group to only one, set the **Allow Access** to **Yes** for the one you want the group to access AND set the **Allow Access** to **No** for the other.

- d. Click **OK** to save your selections and return to the **Security Group** page.
 - e. Repeat these steps for each employer.
6. On the **Security Group** page, specify the access rights of each product for the activity level:
- a. In the **Product** column, highlight the product for which you are setting security. All activities for that product appear in the **Activity** column and the associated tasks and steps appear in the remaining columns.
 - b. Click **Modify** at the bottom of the **Activity** column.
 - c. In the **Activity Selection** window, the **Allow Access** column for each activity is initially set to **Yes**. If you want to disable access, double-click the activity to change the access to **No**.
 - d. Click **OK** to save your selections and return to the **Security Group** page.
 - e. Repeat these steps for each product.
7. On the **Security Group** page, specify the access rights of each activity for the task level:
- a. In the **Activity** column, highlight the activity for which you are setting security. All tasks for that activity appear in the **Task** column and the associated steps appear in the remaining column.
 - b. Click **Modify** at the bottom of the **Task** column.
 - c. In the **Task Selection** window, the **Allow Access** column for each task is initially set to **Yes**. If you want to disable access, double-click the task to change the access to **No**.

Note: 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.

Caution! If you allow a security group to access **Group Security Task** (with **N/A** for the Employer, **System** for Product, and **Rule** for

Activity), 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 the **Change Password Task** (for the **Rule Activity**). The **MASTER** user ID automatically has access to all Sage HRMS system features.

- d. Click **OK** to save your selections and return to the **Security Group** page.
 - e. Repeat these steps for each activity.
8. On the **Security Group** page, specify the access rights for the step level for each task:
- a. In the **Task** column, highlight the task for which you are setting security. All steps for that task appear in the **Step** column.
 - b. Click **Modify** at the bottom of the **Step** column.
 - c. In the **Step Selection** window, the **Allow Access** column for most steps is initially set to **Yes**. If you want to disable access, double-click the step to change the access to **No**.

If you selected **Detail** in the **Activity** column, double-click the step to change its access to **Update**, **View**, or **None**.
 - d. Click **OK** to save your selections and return to the **Security Group** page.
 - e. Repeat these steps for each task.
9. Click **OK** to save the settings for this group and return to the **Security Groups** page.
10. When you are finished, click **X** (the close page icon).

To edit a security group

1. Select **Setup > System > Security > Group Security**.
2. On the **Security Groups** page, highlight the group you want to edit, and then click **More**.

3. On the **Security Group** page, click **Modify** at the bottom of the column whose security you want to change.
4. Make the changes to the security for that level, and then click **OK** to return to the **Security Group** page.
5. When you are finished making changes to that group, click **OK** to return to the **Security Groups** page.
6. When you are finished, click **X** (the close page icon).

To delete a security group

1. Select **Setup > System > Security > Group Security**.
2. On the **Security Groups** page, highlight the group you want to delete, and then click **Delete**.
3. Confirm the deletion.
4. If there are no users assigned to the group, the system deletes the group.

If there are users in the group, the system alerts you and asks you to confirm the deletion again. If you select **Yes**, (in most cases) the group and any users within the group are deleted.

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.

- a. Click **OK** to display the user's task schedule.
- b. Review the list of tasks. To print the tasks for easy reference, click **Print**.
- c. If you still want to delete the group, [remove the scheduled tasks](#) from the user's Organizer, delete the user, or assign the user to another security group.
- d. Click the **Close** button to return to the **Security Groups** page. Then, repeat the procedure to delete the group.

5. When you are finished, click **X** (the close page icon).

Field level security

Field level security limits 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, so all the users assigned to the group have the same type of security selected 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 level 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; (you 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 in Sage HRMS Payroll.

- Telephone number
- Street address
- City
- State
- ZIP/postal code
- County
- Country

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

- 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.

- Marital status
- Ethnic origin
- Gender
- Disability
- EEO-1 pay band
- EEO-1 total hours worked

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.

To set or change field level security

1. Select **Setup > System > Security > Group Security**.
2. On the **Security Groups** page, highlight the group you want to change, and then click **More**.
3. On the **Security Group** page, click the **Field Level Security** tab.
4. For **Employer Selection**, select an employer.
5. For each field category, select one of the following access options. Access rights are initially set to **Not View**.
 - **Not View:** Restricts users in the group from viewing and updating the data. When users access areas of the system containing these fields, the word **Hidden** is displayed.

Note: If users cannot view a field that appears on a report, they cannot generate that report.

- **View:** Allows users in the group to view the data but restricts them from updating it.
 - **Update:** Allows users in the group to view AND change the data.
6. Click **Apply** to save your changes for this employer.
 7. To set field security for another employer, repeat steps 4 - 5.
 8. When you are finished setting field security, you can move to another tab on the **Security Group** page.
 9. When you are finished with this group, click **OK** to save the settings for this group and return to the **Security Groups** page.
 10. When you are finished, click **X** (the close page icon) to close the **Security Groups** page.

Product group filters

In addition to restricting access to specific fields using field level security, 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 July 1, 2015, you can set a product group filter allowing access to only employees fitting that criteria.

To set up a product group filter

To specify which database records a security group's users can access, build an expression on the **Product Group Filters** tab of the **Security Group** page.

1. Select **Setup > System > Security > Group Security**.
2. On the **Security Groups** page, highlight the group you want to change, and then click **More**.
3. On the **Security Group** page, click the **Product Group Filters** tab.
4. For **Product Selection**, select the product 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. If you select **Payroll** for

Product Selection, the fields listed are disabled and cannot be selected for Payroll. Instead, select **HR** for **Product Selection**.

5. In the **Expression** box, build the expression (which consists of a field, operator, and value) and then verify it, as explained in the next section.
6. Click either:
 - **Apply** to save the settings and remain on the **Security Group** page.
 - **OK** to save the settings for this group and return to the **Security Groups** page.

To build and verify the expression

The expression consists of a field, operator, and value.

1. The **Fields** list contains every field in the master file corresponding to your product. For example, for HR, 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.

2. The **Operators** list contains the mathematical operators signifying the relationship in the expression between the field and the value. The following Operators table shows 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

Operator	Description
=	Equal to
!=	Not equal to
>	Greater than

Operator	Description
>=	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

3. Type the value directly into the **Expression** box.

For example, to allow access to employees whose original hire date is prior to July 1, 2015, type the date in numeric form and enclose it in braces. The expression reads:

```
P_ORIGHIRE < {07/01/2015}
```

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

4. Click **Verify** to make sure your expression is built in a format the system can interpret.

The system displays a message if the expression is valid or not. If it is not, determine your error, place your cursor in the **Expression** box, and then correct the error. You can use the **Backspace** and **Delete** keys to remove parts of the expression.

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.

Example: You can also build a compound expression. If you want to limit access to employees whose original hire date is from April 1, 2010 through June 1, 2012, build the following expression:

```
P_ORIGHIRE > {03/31/2010} AND P_ORIGHIRE < {06/02/2012}
```

To edit or delete a product group filter

1. Select **Setup > System > Security > Group Security**.
2. On the **Security Groups** page, highlight the group you want to change, and then click **More**.
3. On the **Security Group** page, click the **Product Group Filters** tab.
4. For **Product Selection**, select the product for this group filter
5. In the **Expression** box, edit the expression as needed.

To delete the filter altogether, use the **Backspace** and **Delete** keys to clear the entire expression.

6. Click either:
 - **Apply** to save the settings and remain on the **Security Group** page.
 - **OK** to save the settings for this group and return to the **Security Groups** page

User security

Each security group has one or more users assigned to it. There are two ways a user can log on to the security group:

- With their Sage HRMS username, name, and password.
- With their Windows logon and password.

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

To add a user

1. Select **Setup > System > Security > User Security**.
2. The table on the **User Security** page shows the users who have already been added.

To add a new user, click **Add**.

3. In the **User Security** page for **Authentication**, select either **Sage HRMS** or **Windows**.
4. If you selected **Sage HRMS**:
 - a. For **Username**, type a maximum of 10 letters; (the system converts them to upper case). This can be the user's initials, the first name, and the first letter of the last name, or any other suitable abbreviation.
 - b. For **Name**, type a maximum of 25 characters. This should contain the user's full first and last name because this is used in the scheduler for task assignments.
 - c. For **Password**, type a maximum of 10 characters for this user's password. For security reasons, you see asterisks instead of the password that you type. The system automatically converts all characters to upper case.
5. If you selected **Windows**:
 - a. For **Username**, click  to look up the user.
 - b. On the **Select a user** page, scroll or use search criteria to find the user.
 - c. Click **OK** to return to the **User Security** page, which shows the user's Windows authentication for **Username** and **Name**. The domain is also included if necessary. The **Password** is blank because the user will provide this when they log on.
6. On the **User Security** page, enter other information about the user:
 - a. For **Email address**, type the user's email address (a maximum of 64 characters).
 - b. For **Position**, type the user's job title or other position description (a maximum of 25 characters).
 - c. For **Group**, select the security group to which you are adding this user.
 - d. For **Allow Access to Sage HRMS Link**, select **Yes** if they can use Sage HRMS Link.
 - e. For **Inactivate Username**, leave **No** as the selection when adding an active user.
 - f. For **Allow Single Sign-on to ESS**, select **Yes** if they can use Sage Employee Self Service.
 - g. For **Allow Access to MWA**, select **Yes** if they can use My Workforce Analyzer.

7. Click **OK**.
8. If you selected Sage HRMS authentication for the user, the **Password Verification** page opens. Type the user's password again for verification and click **OK**.
9. The table on the **User Security** page now shows the new user. The **Authentication** column indicates the type of logon set for the user.

If you want to set up additional users, repeat steps 2 - 8.
10. When you are finished, click **X** (the close page icon) to close the **User Security** page.

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

To edit a user

1. Select **Setup > System > Security > User Security**.
2. In the table on the **User Security** page, select the user you want to edit.
3. Click **More**.
4. On the **User Security** page, edit the information as necessary.

Note: If you change the user's security group, make sure you reassign the tasks this user is no longer able to perform due to restricted access. For information about assigning tasks, see ["Using the Scheduler" \(page 26\)](#).

5. Click **OK** to save your changes and return to the **User Security** page.
6. When you are finished, click **X** (the close page icon) to close the **User Security** page.

To deactivate a user

If a user should no longer be allowed to access Sage HRMS, best practice is to deactivate that user instead of deleting them.

1. Select **Setup > System > Security > User Security**.
2. In the table on the **User Security** page, select the user you want to deactivate.
3. Click **More**.
4. On the **User Security** page, select **Yes** for **Inactivate Username**.
5. Click **OK** to save your changes and return to the **User Security** page.
6. When you are finished, click **X** (the close page icon) to close the **User Security** page.

Note: 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.

To delete a user

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

1. [Remove any scheduled tasks](#) from the user's Organizer.
2. Select **Setup > System > Security > User Security**.
3. In the table on the **User Security** page, select the user you want to delete.
4. Click **More**.
5. On the **User Security** page, click **Delete**.
6. If the user is not scheduled to perform any tasks, confirm the deletion.

Note: If the user has tasks scheduled on their Organizer, the system alerts you and does not allow you to delete the user. Click **OK** to display the user's task schedule, review the list of tasks. To print the tasks for easy reference, click **Print**.

7. The table on the **User Security** page no longer shows this user.
When you are finished, click **X** (the close page icon) to close the **User Security** page.

Ad Hoc Reporting Security

SAP Crystal Reports and Secure Query enable users to design and generate their own queries and reports from system database files. Any user who has access to Crystal Reports or Secure Query can view any field without restrictions—unless you use Ad Hoc Reporting Security, which restricts the database files and fields available to a security group when using Crystal Reports or Secure Query.

Ad Hoc Reporting Security involves two parts:

- Assigning an access level to each field in your Sage HRMS databases.
- Assigning an ad hoc reporting security access level to each security group.

Note: The access levels you assign for ad hoc reporting affect access only in Crystal Reports and Secure Query—they do not impact the rest of the system.

How access levels work

Access levels range from 1 to 9, where 1 is the lowest and 9 the highest. The MASTER user ID has an access level of 9 and can access all fields.

Initially, the access level for a security group is set to 1, so the group's users can access all the fields set to 1. Initially, every field in the databases is set to 1. If you do not want users in a group to access all fields when they generate reports using Crystal Reports or Secure Query, assign those fields an access level of 2 or more.

If the access level for a security group is 2, users in that group can access database fields whose access levels are 1 or 2. If the access level for a security group is 3, users in that group can access database fields whose access levels are 1, 2, or 3. If the access level for a security group is 9, users in that group can access all database fields (fields in levels 1 through 9).

Example of restricted access to fields

There are two security groups: Data Entry and Pay Manager

We want the users in these groups to have the same capabilities generating custom reports in Crystal Reports and Secure Query except the Data Entry group cannot generate custom reports containing the **Earnings/Deductions Code** field. To do this:

- Change the access level for the **Earnings/Deductions Code** field to 5.
- Assign an ad hoc reporting security access level to the Pay Manager group to 5 (so the users in that group can access fields in level 5 and lower).
- Leave the ad hoc reporting security access level for the Data Entry group at 1 (so the users in that group cannot access fields in levels above 1).

Note: If the access level for the **Earnings/Deductions Code** field is set to 6 or more, even users in the Pay Manager group are unable to use that field in Crystal Reports or Secure Query.

Assigning access levels to fields

The **Ad Hoc Reporting Security** page contains a table with every field in every database file in your Sage HRMS system.

- The first column displays the database file names in alphabetic order.
- The second column displays the field descriptions.
- The third column displays the field's access level. There are nine access levels (one through nine). Initially, all fields are set to access level 1.

Before setting access levels, determine to which fields you want to have restricted access.

Tip: Use the product's Data Dictionary to help you locate a specific field within a database file.

To assign access levels to fields

1. Select **Setup > System > Security > Ad Hoc Reporting Security**.
2. On the **Ad Hoc Reporting Security** page, change the access levels if necessary.
 - To set the level for all fields in all database files, select a number from 1 to 9 for **Change Security Level for All Fields** at the top of the page. All fields change to that access level number.
 - To set the level for 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** at the top of the page. All fields within the selected database file change to that access level number.

- To set the level for one field at a time, select the row with the field, and then enter a number from 1 to 9 in the **Access Level** column.
3. Click either:
 - **Apply** to save the settings and remain on the **Ad Hoc Reporting Security** page.
 - **OK** to save the settings and close the page

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 set field levels.

Assigning access levels to security groups

When you set up security for a group, the ad hoc reporting security level is initially set to 1, but you can change it. This access level determines which fields in the Sage HRMS system databases the security group's users are able to access when they use Crystal or Secure Query.

To assign access levels to security groups

1. Select **Setup > System > Security > Group Security**.
2. On the **Security Groups** page, double-click the group whose access level you want to change.
3. For **Ad Hoc Reporting Security Level** (on the bottom of the **Group Level Security** tab of the **Security Group** page), select a number from 1 to 9.
4. Click **OK** to save the setting for this group and return to the **Security Groups** page.
5. Repeat steps 2 - 4 for each security group whose access level you want to change.
6. When you are finished, click **X** (the close page icon).