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This document includes instructions for installing and setting up Sage Employee Self Service 2015 for the first time and upgrading Sage Employee Self Service from prior versions.

Support and resources

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

- **Help and documentation.** Many answers to common questions can be found in the help and documentation included with Sage HRMS and Sage Employee Self Service.

- **Customer Support.** For additional articles and resources, visit [https://support.na.sage.com](https://support.na.sage.com) or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Customer ID handy when contacting Customer Support.

- **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](http://www.SageChecks.com).

System requirements

The latest information on Sage Employee Self Service system requirements is available on the [Knowledgebase](https://knowledgebase.na.sage.com) under Article ID 50163.

Before you begin

Make sure you have the following items before you begin a new installation or an upgrade:

- Sage Employee Self Service 2015 installation package

- Sage Employee Self Service 2015 Installation and Setup Guide (this document)

- Sage HRMS and Sage Employee Self Service 2015 release notes (if you are upgrading from a prior version)

**Note:** We recommend that you have a certified business partner or a member of the Sage Professional Services Group install Sage Employee Self Service for you.
Chapter 1: Pre-installation setup

This chapter is provided to help you prepare your system prior to installing Sage Employee Self Service (Sage ESS). It includes the following topics:

- Microsoft Windows Server and SQL Server compatibility and configuration
- Firewall and network configuration
- Creating a Microsoft Windows account
- Security configuration and best practices

About Microsoft Windows Server compatibility

Windows Server 2003 Web Edition compatibility with SQL Server


Windows Server 2008 Web Edition compatibility with SQL Server


Microsoft database management resources

Information concerning Microsoft SQL Server security, stability, and scalability is available on the Microsoft SQL Server website: [http://www.microsoft.com/sql/techinfo/default.mspx](http://www.microsoft.com/sql/techinfo/default.mspx)

Client requirements for web access to Sage Employee Self Service

Your system must meet the minimum requirements for Microsoft® Internet Explorer version 7 or higher. At the time of release, information about Microsoft® Internet Explorer current versions is available on their product website: [http://windows.microsoft.com/en-us/internet-explorer/download-ie](http://windows.microsoft.com/en-us/internet-explorer/download-ie)
Using ASP.NET 3.5

If ASP.NET 3.5 Framework is installed, you must open Internet Information Services (IIS) Manager and change the Web Service Extension for ASP.NET v2.0 from Prohibited to Allowed, or you will be unable to open the Sage Employee Self Service web page. See the following figures for IIS v6.0, IIS v7.0, and IIS v8.0 setup.

IIS V6.0

IIS V7.0 and IIS V8.0
Setting up employee analytics with Microsoft Windows Server 2008

You can use the employee analytics feature in Sage ESS to share workforce data with other employees in your company. Using View Builder, a highly versatile and customizable analytical tool, you can implement Employee Analytics in your company. View Builder is used for creating a view (similar to a template) that both generates data and displays the output in a web browser.

Follow the steps below if you install Sage Employee Self Service on a server running Windows Server 2008 and you plan to use View Builder.

1. On the server, select **Start > Administrative Tools > Server Manager** to open the Server Manager window.
2. Click the Roles node in the left pane.
3. Click Add Roles Services to open the Add Role Services window.
4. Select Application Development and then click **Install**.
5. Scroll down the list of Role services and select Security.
6. Scroll down the list of Role services and select IIS Management Compatibility.
7. Click **Next** and then click **Install** to install the selected components.
8. After the install is complete, click the Features node and then click Add Features to open the Add Features Wizard.
9. Select SMTP Server. If necessary, click **Install** to also install the Web Server (IIS) service.
10. Click **Next** and then click **Install** to install the selected features.
11. Restart the server.

Setting up information sharing with Microsoft Windows Server 2012

Roles and features configuration on Windows Server 2012

**Note:** Once these steps are completed, you must restart the server.
1. On the server, select your Server Manager.

2. Select Add roles and features from the Quick Start list. The Wizard walks you through the configuration steps.

3. From the Server Roles list, select Web Server (IIS) and click Next.

4. Scroll down the list of Roles and select IIS Management Compatibility.

5. Click Next and then Install to install the selected components.

6. After the installation is complete, click Features from the left menu and click Add Features to open the wizard.

7. Select SMTP Server. If necessary, click Install to also install the Web Server (IIS) service.

8. Click Next and then click Install to install the selected features.

9. Restart the server.

Configuring firewall and security services

Sage HRMS firewall configuration

Sage HRMS clients require the following firewall considerations:

Outgoing connections

The following ports must be open for clients to connect to Sage Employee Self Service:

- **www-http:** 80/TCP. This is needed only when non-secure (http) access to the server is allowed.

- **https:** 443/TCP. This is needed only if you want https access to the server and it is configured.

When Sage HRMS is configured to connect to a non-local SQL Server, incoming and outgoing traffic for the following port is required. Refer to Microsoft Knowledge Base article “INF: TCP Ports Needed for Communication to SQL Server Through a Firewall” (KB ID 287932):

http://support.microsoft.com/kb/287932/en-us

- **mssql ms-sql:** 1433/TCP

Sage Employee Self Service firewall configuration

A Sage Employee Self Service server requires the following firewall considerations:
Incoming connections

The following ports must be open for incoming connections to the server:

- **www-http**: 80/TCP. This is needed only when non-secure (http) access to the server is allowed.
- **https**: 443/TCP. This is needed only if you want https access to the server and it is configured.

Outgoing connections

When Sage Employee Self Service is configured to connect to a non-local SQL Server, incoming and outgoing traffic for the following port is required. Refer to Microsoft Knowledge Base article “INF: TCP Ports Needed for Communication to SQL Server Through a Firewall” at: [http://support.microsoft.com/?id=kb;en-us;Q287932](http://support.microsoft.com/?id=kb;en-us;Q287932)

- mssql ms-sql: 1433/TCP

To resolve IP addresses via DNS (depending on your server configuration), the following ports need to be open:

- domain:53/TCP
- domain:53/UDP

To send mail from the local SMTP service, at least the following port has to be available if outgoing connections are configured to be sent or forwarded from the Sage Employee Self Service server:

- smtp:25/TCP

Network security configurations

The following images are of common configurations that are used when implementing Sage Employee Self Service. These are guidelines only and can be modified for your environment.
Chapter 1: Pre-installation setup

Basic network security – IIS behind Firewall

Advanced network security – IIS and two Demilitarized Zones (DMZs)

Enhanced network security – IIS in Demilitarized Zone (DMZ)
Sage ESS Data Execution Prevention (DEP) settings

Data Execution Prevention (DEP) is a set of hardware and software technologies that perform additional checks on memory to help prevent malicious code from running on a system. If you are running Sage Employee Self Service on a Windows 2003 Server with Service Pack 1 or higher, you must verify the DEP settings are correct.

**Tip:** Refer to Microsoft Knowledge Base article 875352 for more information on DEP: [http://support.microsoft.com/kb/875352](http://support.microsoft.com/kb/875352).

On the Sage Employee Self Service server, follow the steps below. We recommend that these steps be performed only by your company’s IT department and with the assistance of a certified business partner or a member of the Sage Professional Services Group.

1. After verifying the DEP settings, you will be instructed to reboot the server. Before you begin, we recommend you make the necessary preparations for this required server reboot.

2. Verify the operating system is Windows 2003 Server with Service Pack 1 or higher: Click **Start > Run**, type `winver`, and press **Enter**.

3. Verify the processor supports hardware DEP:
   a. Go to **Control Panel > System > Advanced**.
   b. Click **Settings** in the Performance section.
   c. Click the **Data Execution Prevention** tab.
   d. Verify that you do not see the following text at the bottom of the tab: “Your computer’s processor does not support hardware-based DEP. However, ...”

4. If you do not see the text and Sage ESS is generating error 80010105, do the following to switch DEP settings:
   a. Go to **Control Panel > System > Advanced**.
   b. Click **Settings** in the Performance section.
   c. Click the **Data Execution Prevention** tab.
   d. Select **Turn on DEP** for essential Windows programs and services only.
   e. Click **OK** to save and close all windows.

5. Reboot the server.
Creating a Microsoft Windows user account

Sage Employee Self Service requires a Microsoft Windows user account with read and write access to the Sage HRMS data files, has permissions to log on as a service and launch processes, and is a member of the administrators group from the Sage Employee Self Service Web/Application server.

Use these instructions to create this account if the data files are located on your Sage Employee Self Service Web/Application server (that is, the server where you perform the Sage Employee Self Service installation).

If the Sage HRMS database files are located on a different server and your enterprise uses workgroups, you must create the same Windows user account on both the Sage ESS Web server and the Sage HRMS server. If your enterprise uses domains or active directory, a Windows user account at the domain level is sufficient.

If Sage HRMS is accessed through a file share, you must set both share permissions and NTFS permissions (if applicable) to allow read and write access for the account. The account should have a ‘static’ password that does not need to be changed. This prevents errors when Sage ESS accesses the share using the account information.

To create a user account

Skip the steps below if you already have a Windows user account that meets the aforementioned criteria.

1. From the Start menu, select (All) Programs > Administrative Tools > Computer Management > System Tools > Local Users and Groups.

2. Add a New User:
   b. In the User Name field, enter the Windows user account that has write access to the Sage HRMS data files. This account should have the rights of a standard user account (local or domain).
   c. In the Password fields, enter and confirm the password.
   d. Clear User must change password at next logon.
   e. Select User cannot change password and Password never expires.
   f. Click Create.
   g. Click Close.
3. Add the new user to the Administrator group:
   a. Right-click the (Sage ESS) user and select **Properties**.
   b. Click the **Member Of** tab and then click **Add** to open the Select Groups window.
   c. Click **Advanced** and then **Find Now** to find the Administrators group.
   d. Highlight the **Administrators** group and click **OK**.
   e. Click **OK**.
   f. Click **OK** to end the task. The Sage ESS user is added to the Administrators group.

4. Using Windows Explorer, navigate to the Sage HRMS Data folder, right-click and select **Properties**.
   a. If you are using Windows Server 2003 machine, the default location is `\Documents and Settings\All Users\Application Data\Sage\SageHRMSServer\Data`
   b. If you are using a Windows Server 2008, Windows 7, or Windows 8 machine, the default location is `\ProgramData\Sage\SageHRMSServer\Data`
   c. In the Data folder’s Properties window, select the **Security** tab and click **Add**. The Select Users, Computers, or Groups window opens.
   d. In the **Enter the object names to select** field, enter your `<local server name>\ESS`.
   e. Click **OK**.
   f. Set the **Modify user permission** to **Allow**.
   g. Click **OK**.

**Recommendations for public access workstations**

Sage Employee Self Service allows users to access their personal, payroll, and benefit information via the Internet or an intranet.

When you connect to a network and communicate with others, you are taking a risk. Internet security involves the protection of a computer’s internet account and files from intrusion of an unknown user. This means people will always strive to find new ways to circumvent IT security, and users will need to be continually vigilant.
Below are some recommendations for keeping your system and network secure. However, we highly recommend that you contact an Information Security expert to determine the best way for your company to keep your information secure.

Software applications best practices

- Install and maintain up to date and properly configured anti-virus software. Be sure that real-time protection scans all files.
- Install active spyware defenses, for example, Windows Defender.
- Install only the minimum number of applications as needed.
- Update web plug-ins, Java Scripts, and media players on a regular basis as these are areas of increasing vulnerability.
- Periodically check the website of the Operating System vendor (such as Microsoft) for critical security updates that may need to be applied.
- Consider using multiple web browsers for different software applications. Currently, Sage ESS operates with Internet Explorer 7.0 or newer; Google Chrome 4.0.223.16 or newer; Apple Safari 3.2.3 (525.29) or newer, and Mozilla Firefox 3.6.3 or newer. Sage Employee Self Service Open Enrollment/Life Events can run with Internet Explorer 7.0 or newer. So, for example, you could use Mozilla Firefox to access Sage ESS and a different browser for general purpose web browsing. This can minimize the chances of vulnerability in a web browser, a website, or related software that can be used to compromise sensitive information.
- Disable other unnecessary network services.

Data security best practices

- Keep backup copies of important documents on a secure server and not a shared workstation.
- Use certificates, especially if you modify a DNS server (or write a Java-based SSL proxy) to point your web or XML client to another website.
- Configure the Sage Employee Self Service web server for HTTPS/SSL using a valid site certificate and do not allow access from public workstations or computers on the Internet.
- Enable or disable functionality as required to secure your web browser. Because some software features, such as ActiveX, Java, Scripting (for example, JavaScript or VBScript), that provide functionality to a web browser can also introduce vulnerabilities to the computer system, you
must understand which browsers support which features and the subsequent risks they could introduce. If you are not sure how to define the security settings, please consult an Information Security expert.

- Disable broadcast services.
- Disable the cache on the local system and always store confidential data securely (in transit and at rest).
- Clear temporary files regularly and set Internet Explorer to have a 0 day history and to clear the cache upon exit. This helps destroy session cookies.
- Require users to change their password regularly and require a strong password.
- Never allow Windows to remember your passwords.
- Lock the BIOS to prevent USB, CD-ROM, or Network booting and use a strong BIOS password.
- Prevent Internet Explorer from caching passwords.
- Perform a port scan or a network statistics on the kiosk operating system to determine active TCP connections. Block everything except the ports you need.
- Institute strong group policies. This is a good way to prevent security issues.
- Stress the importance of logging off and closing all applications, not opening attachments unless you know the sender and know that it was intentionally sent to you, and not clicking links without considering the risks of their actions.
- Consult your Information Security expert to determine the best approach to maintain security of your system without inconveniencing your employees.
Chapter 2: System configuration

This chapter provides instructions for configuring Internet Information Services (IIS) for Windows Server 2003, 2008, and 2012 (including ASP.NET), and SMTP, in preparation for installing Sage Employee Self Service.

Before you start

During configuration and installation, the following assumptions apply:

- You have added the server to your domain or workgroup depending on what your organization requires.
- You have the appropriate downloads or disks necessary for installing software during this installation, including:
  - Microsoft Windows Server 2008, Standard, Express, or Enterprise Editions
  - Microsoft Windows Server 2012, Standard, Express, or Enterprise Editions

Configuring IIS on Windows 2003 Server

Windows 2003 Server uses the concept of roles. Roles are server functions that your server performs for you after they have been configured.

To configure IIS

1. From the Start Menu, select All Programs > Administrative Tools > Manage Your Server and select Add or remove a role.

2. Make sure you have completed the tasks on the Preliminary Steps window before clicking Next:
   - Install all modems and network cards.
   - Attach all necessary cables.
   - If you plan to use the server for Internet connectivity, connect to the Internet.
- Turn on all peripherals, such as printers and external drives.
- Have your Windows Server 2003 Setup CD available, or know your network installation path.

3. On the Server Role window, select **Application server** (IIS, ASP.NET) since the Internet Information Server is the first role you will set up. Click **Next**.

4. On the Application Server Options window, select only **Enable ASP.NET** as this is the only tool needed for Internet Information Services. Click **Next**.

5. The Summary window lists the ASP.NET framework components the server installs for Internet Information Services 6.0. Click **Next**. The role is applied to your server.

6. When setup is complete, the Server is Now an Application Server window opens. Click **Finish**. The Application Server role has now been added and configured for your server.

### Next steps
- If you do not plan to use the outbound email feature in Sage Employee Self Service, refer to [Chapter 3: Installing Sage ESS](#) for additional instructions.
- If you plan to use the outbound email feature in Sage Employee Self Service for email notifications, go to the next section, Configure the Mail Server. You can configure your mail server before or after installing Sage Employee Self Service.

## Configuring the Mail Server

The next server role that needs to be added is the Mail Server (SMTP, POP3) role.

1. From the Start Menu, select **All Programs > Administrative Tools > Manage Your Server** and select **Add or remove a role**.

2. Make sure you have completed the tasks on the Preliminary Steps window. Click **Next**.

3. On the Server Role window, select **Mail server (POP3, SMTP)**. Click **Next**.

4. Proceed with configuring the mail server in accordance with your company’s network environment.

**Note:** Proper SMTP configuration requires knowledge about networking, protocols, authentication methods, firewalls, and configuration of the specific receiving mail servers. We recommend you consult with your IT department or your ISP for the correct settings for your company's specific messaging requirements.
For assistance on configuring the SMTP service for Windows 2003 server, refer to the Microsoft Knowledge Base article “HOW TO: Set Up and Configure an SMTP Virtual Server in Windows 2003” (http://support.microsoft.com/kb/324285).

You can also use Windows 2003 SMTP online Help.

Next steps

- If you plan to use SQL Server 2005 or 2008 for the Sage Employee Self Service database, go to the appropriate Install SQL Server sections.


Setting up SMTP within IIS

Below are some troubleshooting tips to determine why emails are not delivered from Sage ESS.

1. Check that there are no firewalls or other hardware and software installed that could be blocking the ports needed for mail delivery. Port 25 should be made available for delivery when using Sage ESS.

2. Go to the root of the C drive on the web server where Sage ESS is installed and locate the Inetpub directory.

3. Expand the folder and browse to find the Queue folder. If there are emails collecting there, they are not being delivered, and you must check relay permissions in Properties for the Default SMTP Virtual Server.

4. Right-click the Default SMTP Virtual Server in the IIS console.

5. Select Properties, select the Access tab, and then click the Relay button.

6. Ensure that there is a path directed to the Exchange Server so that mail can be delivered. To test this:

   - Copy one of the queued messages and paste it in the Pickup folder.

   - If it returns to the Queue folder, a Smart Host is not assigned in the Default SMTP Virtual Server properties. The Smart Host will be the name of the server that is used as the Exchange server and/or Mail server.
To locate this setting right-click on the Default SMTP Virtual Server in the IIS console, and select Properties.

- Select the Delivery tab and click on the Advanced tab.
- Enter the name of the correct server in the Smart Host field.

**Note:** When using Microsoft Exchange for Mail, a connector is needed to accept the email from the Default SMTP virtual server.

7. For assistance creating the connector for SMTP visit: [http://support.microsoft.com/kb/265293/en-us](http://support.microsoft.com/kb/265293/en-us)

8. From the IIS console manager, right-click the Default SMTP Virtual Server and stop the process.

9. Restart the Default SMTP Virtual Server and the email messages should be delivered.

### Modifying relay permissions in IIS

The following steps enable you to modify the relay permissions in IIS for the Virtual SMTP server to allow the service to run properly with Sage ESS.

1. Select Start > Run, enter MMC, and click OK. The Microsoft Management Console (MMC) appears.

2. Add the Internet Information Services from the File menu.

3. Expand IIS and select the computer on which Sage ESS is installed.

4. Expand the section and right-click Default SMTP Virtual Server and select Properties.

5. Select the Access tab, and then click the Relay button. The Relay Restriction box opens.

6. Select the **All but the list below** button (by default, it is set not to allow the relay of email).

7. Right-click the Default SMTP Virtual Server and stop the service.

8. Restart the service.

9. Enter the SMTP server name on the System Maintenance utility and click **Save**.
Chapter 2: System configuration

Windows Server 2008 configuration

Setting the Application role and Web Services role

1. Log in to Windows Server 2008 using your Administrator credentials.

2. Select Start > Administrator Tools > Server Manager. The Server Manager Page displays.

3. Select Roles (from the Server Manager Tree) > Add Roles to access the Add Roles Wizard.

4. The Before You Begin window appears. Click Next.

5. In the Select Server Roles window, select the Application Server.

6. In the Select Server Roles window, click the Add Required Features button. You are returned to the Select Server Roles Page.

7. In the Select Server Roles Page, select Web Server (IIS) and click Next. You are returned to the Select Server Roles window.

9. Click **Add Required Role Services** button. You are returned to the Select Role Services window.

10. Select **Web Server (IIS) > Role Services**. Make your selections as displayed in the image below:

11. Click **Install**. After the installation is complete, click **Close**.

Adding the SMTP Server mail feature

1. Log in to Windows Server 2008 with the server roles that you installed (in the previous section).

2. Select **Start > Administrator Tools > Server Manager**. The Server Manager window opens.

3. From the Server Manager tree, select **Features > Add Features**. The wizard starts and the Select Features window opens.

4. Select the **SMTP Server** check box. The Add Features Wizard window opens.

5. Click the **Add Required Role Services** button. You are returned to the Select Features window.

6. Click **Next**. The Web Server (IIS) window opens.
7. Click **Next**. The Select Role Services window opens (this window is accessed by selecting **Web Server (IIS) > Role Services**).

   **Note:** The installer will accept the items that are checked by default in the Add Features wizard.

8. Click **Next**. The Confirm Installation Selections window opens.

9. Click **Install**.

10. After the installation is complete, click **Close** to close the wizard.

11. Restart your server.

---

**Windows Server 2012 configuration**

**Setting the Application role and Web Services role**

1. Log in to Microsoft Windows Server 2012 using your Administrator credentials.

2. Select the **Server Manager** from your programs.

3. Select **Dashboard > Add roles** and features (from the Server Manager Dashboard) to access the Add Roles and Features Wizard.

4. In the Server Roles window, expand **Application Development (Installed)** as displayed in the image below.
5. In the Server Roles window, click the **Install** button. You are returned to the Add Roles and Features Wizard window.

6. In the Select Server Roles Page, select **Web Server (IIS)** and click **Next**. You are returned to the Select Server Roles window.

7. Select **Application Server > Role Services** then select **Web Server (IIS) Support**.

8. Click the **Install** button. You are returned to the Add Roles and Features Wizard window.

9. Select **Web Server (IIS) > Role Services**.

10. Select the **IIS 6 WMI Compatibility** check box and click **Next**. The Confirm Installation Selections window opens.

11. Click **Install**.

12. After the installation is complete, click **Close**.

### Adding the SMTP Server mail feature

Note: After completing these steps you will be required to restart the server.
1. Log in to Windows Server 2012 with the server roles that you installed (in the previous section).

2. Select **Start > Administrator Tools > Server Manager**. The Server Manager window opens.

3. From the Server Manager tree, select **Features**. The Add Roles and Features Wizard starts.

4. Select the **SMTP Server** check box.

5. Click the Add Required Role Services button. You are returned to the Add Roles and Features Wizard window.

6. Click **Next**. The Web Server (IIS) window opens.

7. Click **Next**. The Add Roles and Features Wizard window opens (this window is accessed by selecting Web Server (IIS) > Server Roles).

   **Note:** The installer will accept the items that are checked by default in the Add Roles and Features Wizard.

8. Click **Next**. The Confirm Installation Selections window opens.

9. Click **Install**.

10. After the installation is complete, click **Close** to close the wizard.

11. Restart your server.
This chapter provides instructions to install and set up Sage Employee Self Service (Sage ESS). It includes the following topics:

- Installing Sage Employee Self Service
- Upgrading Sage Employee Self Service to version 2015
- Using Sage Employee Self Service System Maintenance

Before you start


- If you are loading Sage Employee Self Service from a network drive, we recommend that the files are copied to a local drive or that the network connection be initialized during startup.

- Do not install Sage Employee Self Service on a Windows Server that is an Active Directory or Domain Controller. Microsoft does not recommend this and Sage does not support this configuration.

- Back up your Sage HRMS system using your external backup procedures. Make sure everyone has exited Sage HRMS before beginning the backup and installation.

- You must have Administrator access (Local Administrator access is preferred) and access to the Sage HRMS data to perform the Sage Employee Self Service installation.

- Your Sage HRMS database must be accessible through a local or UNC path (Windows share) from your Sage Employee Self Service server.

- If you are installing Sage Employee Self Service on Windows Server 2008, you must disable User Account Control (UAC) before you install. When installation is complete, remember to re-enable it.

- When you enter text in fields on the installation windows (such as the company name or server name), the text must contain only alpha or numeric characters (alphabetic characters a-z, A-Z and numeric characters 0-9). You must not use any special characters (#, -, @ or punctuation marks).

Sage Employee Self Service and Microsoft SharePoint Services 2.0

Sage Employee Self Service can be used on the same server as Microsoft Windows SharePoint Services 2.0. However, Sage does not recommend this and cannot assist you with issues that may
result from this type of installation.

If you pursue this type of installation, you must install SharePoint Services 2.0 on a site other than the default website because Sage Employee Self Service uses the default website and conflicts will occur. Adding SharePoint Services to the default website prevents access to an installed version of Sage Employee Self Service. To troubleshoot Windows SharePoint Services 2.0 installation issues, visit: http://msdn.microsoft.com/en-us/library/cc288422(office.12).aspx

Installing Sage Employee Self Service on a new server

Follow these instructions and cautions if you are installing Sage Employee Self Service for the first time. Due to the complexity of Sage ESS, we recommend that you consult a certified business partner or member of Sage Professional Services Group to perform the process.

Installing Sage Employee Self Service

**Note:** If you are installing Sage Employee Self Service on a Windows 2008 or 2012 server, you must disable User Account Control (UAC) before you install. When installation is complete, remember to re-enable it.

1. Open the Sage Employee Self Service 2015 installation package. Right-click the `setup.exe` file, select **Run as Administrator**, then click **Next**.

2. In the License Agreement window, read the License Agreement. Accept the terms of the license agreement and click **Next**.

3. In the Customer Information window, enter your **User Name**, **Organization**, **Serial Number**, and **Install Code** and then click **Next**.

4. In the Destination Folder window, select the path and directory where you want Sage Employee Self Service and components installed (local drives only). The server can be the same as the Sage HRMS server, but this is not a requirement. Click **Next**.

5. In the Sage HRMS SQL Server Setup window, specify the server configuration for the Sage HRMS database. Enter the **Server Name**, **User Name**, **Password**, and **Database**. Click **Next**.

6. In the Sage Employee Self Service Web Alias window, the Name/Alias defaults to selfservice. This is the Name/Alias that is used when you access Sage Employee Self Service from your web
browser. If you want selfservice as your Name/Alias, click **Next** to accept this name. Otherwise, enter the appropriate Name/Alias and click **Next**.

7. In the Email Configuration window, you must select **Enable Emails (SMTP)** to install Sage Employee Self Service. If you do not want Sage ESS to send emails automatically, you can disable this setting in the System Maintenance utility later. If you choose to maintain this setting, you must configure your SMTP server before you can enable email delivery. Click **Next**.

8. In the SQL Server Setup window, indicate whether you are using SQL Server 2005 or SQL Server 2005 Express Edition, or SQL Server 2008 (the default database embedded with Sage Employee Self Service). Enter **Server Name**, **User Name**, **Password**, and **Database**. If you are using SQL Server, you must provide a SQL Server logon that emulates your SA (System Administrator) permissions. Click **Next**.

9. In the Ready to Install the Program window, click **Install** to proceed with the installation.

10. When the InstallShield Wizard Completed window appears, click **Finish**.

11. When installation is complete, click **Yes** to restart your computer.

    **Note:** If you installed on a Windows 2008 or 2012 Server, remember to re-enable User Account Control (UAC).

12. After your Sage Employee Self Service server restarts, from your Start menu select **All Programs > Sage Employee Self Service > System Maintenance** to open the System Maintenance utility.

13. Review the information on the Configuration and Settings tab and then click **Save**.

14. Click the **SQL Maintenance** tab and verify or enter the location and name of your Sage Employee Self Service database backup file.

15. Click **Backup** and confirm the action to start the process. An indicator shows the process as it runs and a message confirms when it is finished.

16. Select the **Duplicate Key Report** tab and click **Run Report**. This verifies that you can access the Sage HRMS data location and that the user account to access Sage HRMS data is correct. If there are errors in the database, give the report to the person responsible for maintaining the data so they can fix the errors. Refer to the **Duplicate Key Report** section of this guide for more information.

17. **Close** the System Maintenance utility.
18. If you installed Sage Employee Self Service on a Windows 2008 or 2012 64 bit server, do the following procedure to avoid an “Access to the temp directory is denied…” error message (otherwise, skip to the next step). The following steps show how to set the Application Pool Identity to use an administrator account when running Sage Employee Self Service on a Windows 2008 or 2012 64 bit server:


c. In Actions, select Edit Application Pool > Advanced Settings....


e. In the Application Pool Identity window, select Custom account and set it to <servername>\user, where user is a user with an administrator account.

19. Launch Microsoft Internet Explorer on any client workstation connected to the server (but not the server itself) and enter the following URL in the Address field:

   http://<YourServer>/<ConfiguredVirtualDirectoryName>

   For example: http://localhost/selfservice

   If you already have a domain name for external access and intend to use https, enter:
   https://<Server.Domain.TopLevelDomain>/<ConfiguredVirtualDirectoryName>

   Notes:
   - The <ConfiguredVirtualDirectoryName> is the Name/Alias you entered in step 6 above.
   - You must enter the URL exactly as the Sage HRMS client calls it, as this is what is stored in Sage HRMS to allow access to Sage Employee Self Service. The system stores the Sage Employee Self Service URL in the SYENTER system table as E_AWCURL.

20. The Sage Employee Self Service logon page appears. You must complete the following setup steps immediately after you install or upgrade Sage ESS.

   a. Log on as the Master user. Use the password provided in the installed System Maintenance utility, under the Configuration and Settings tab. Click Generate Master Password and copy the password provided to log into Sage ESS as the Master user.

   b. Select System Administrator > Roles and Logon > Logon Setup to open the Logon Setup page.
c. At the bottom of the page, select five security questions you want to present to a user when they attempt to create a new logon.

Note: When an employee creates a new logon, they must select one of the five security questions and provide a security answer. The question is then presented when the employee attempts to change or reset their password. If the answer does not match the answer they created, they are returned to the Employee Logon page with a message that the Logon information could not be verified.

d. Click Save to set the security questions.

21. Installation is now complete and you are ready to start using Sage Employee Self Service.

Next steps
Refer to the Setting Up Sage Employee Self Service chapter of this guide for information about setting up the program.

Upgrading Sage Employee Self Service

Before you start

- Collect a screenshot or screen capture of your System Maintenance > Configuration and Settings window prior to beginning this process. You may be prompted to enter the information on this window during the upgrade.

- Verify that Sage HRMS has been installed and is working correctly.

- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access the Sage HRMS data.

- If you are using Benefits Enrollment/Open Enrollment, make sure all enrollment periods are closed, and that all users have exited and logged off from Sage HRMS and Sage Employee Self Service before beginning the backup and upgrade.

- When the upgrade is complete, you must restart your computer. Make the necessary preparations for this required restart.
Upgrading Sage Employee Self Service

1. Using your external backup procedures, do a backup of the Sage HRMS and Sage ESS databases to a media device that is external to your Sage HRMS and Sage ESS servers.

2. Log on to the Sage ESS server and select **Programs > Sage Employee Self Service > System Maintenance** to open the Sage ESS System Maintenance utility.

3. On the **Configuration and Settings** tab, in the Sage Employee Self Service section, select the **Locked** check box.

4. Click **Save**.

5. Go to the SQL Maintenance tab, verify the **Backup File Path** is correct, then click **Backup**, and confirm the action to start the process.

6. Close all Windows applications you have running.

7. Open the Sage Employee Self Service2015 installation package. Right-click the **setup.exe** file, select **Run as Administrator**, then click **Next**.

8. Select Sage Employee Self Service and then select **Install** Sage Employee Self Service.

9. The installation program detects that a previous version of Sage Employee Self Service has been installed. Click **Next**.

10. On the Sage HRMS Database Type window, select the SQL Server database type and click **Next**.

11. On the Sage HRMS SQL Server Setup window, enter **Server Name**, **User Name**, **Password**, and **Database**. If you are using a SQL database, you must provide a SQL Server logon that has SA (System Administrator) permissions. Click **Next**.

12. On the Ready to Install the Program window, click **Install** to proceed with the installation.

13. When the InstallShield Wizard Completed window appears, click **Finish**.

14. When the upgrade is complete, click **Yes** to restart your computer.

15. After your Sage Employee Self Service server restarts, from your Start menu select **All Programs > Sage Employee Self Service > System Maintenance** to open the System Maintenance utility.

16. Click the **SQL Maintenance** tab and verify or enter the location and name of your Sage Employee Self Service database backup file.
17. Click Backup and confirm the action to start the process. An indicator shows the process as it runs and a message confirms when it is finished.

18. Select the Configuration and Settings tab and click Save. Exit System Maintenance.

   Important! You must complete the following setup steps immediately after you install or upgrade Sage ESS.

19. Log on as the Master user. Use the password provided in the installed System Maintenance utility, under the Configuration and Settings tab. Click Generate Master Password and copy the password provided to log into Sage ESS as the Master user.

20. Select System Administrator > Roles and Logon > Logon Setup to open the Logon Setup page.

21. At the bottom of the page, select five security questions you want to present to a user when they attempt to create a new logon.

   Note: When an employee creates a new logon, they must select one of the five security questions and provide a security answer. The question is then presented when the employee attempts to change or reset their password. If the answer does not match the answer they created, they are returned to the Employee Logon page with a message that the Logon information could not be verified.

22. Click Save to set the security questions.

23. When the backup is finished, go to the Configuration and Settings tab and clear the Locked check box.

24. The upgrade is now complete and you are ready to start using Sage Employee Self Service.

Next steps

Review the Setting Up Sage Employee Self Service chapter of this guide for any changes to the setup of the program.
Chapter 4: Setting up Sage Employee Self Service

This chapter provides instructions to setup Sage HRMS to work with Sage Employee Self Service. The extent of your setup depends on the modules you are using in Sage HRMS, the modules you installed for Sage Employee Self Service (such as Benefits Enrollment), and the way in which you will use these modules. Review each step in its entirety to determine if it applies to your usage requirements.

When you finish these steps, employees and administrators can create their logons and use Sage Employee Self Service as needed. When your company is ready to set up Sage Employee Self Service for benefits enrollment or life events, refer to the Sage Employee Self Service Benefits Planning Guide.

Setting up Sage HRMS for Sage ESS

Use the following instructions to prepare Sage HRMS for integration with Sage ESS.

Assigning secondary supervisors

In Sage HRMS, complete this step if you want to use the Supervisor role in Sage Employee Self Service.

When a secondary supervisor is assigned for an employee, he is considered the employee’s Supervisor in Sage Employee Self Service. Thus, Sage Employee Self Service allows for a Manager and a Supervisor.

The person assigned as an employee’s secondary supervisor in Sage HRMS is used in Sage Employee Self Service as the person who is responsible for the day-to-day tasks performed by an individual employee. While they lack the level of authority of a manager, they have an oversight responsibility for the employees with whom they work. A supervisor might be responsible for tracking and approving employee time off requests.

If you want to use the Supervisor role in Sage Employee Self Service (commonly used for approving employees’ time off requests), you must fill in this field for each employee in each Sage HRMS Employer for which you want to use the role.

1. Log onto Sage HRMS and select Employees > View/Edit Employee and select an employee. Then, select Job and Pay > Current Job.
2. Select the Organization subtab.
3. Click the Find button in the Secondary Supervisor field and select the employee to assign as the employee’s secondary supervisor.
4. Repeat step 3 for all employees who should have secondary supervisors assigned to them.
5. Save your changes.
Updating email addresses

In Sage HRMS, do this step if you want Sage Employee Self Service to send emails to employees, managers, supervisors, administrators, recruiters, and hiring managers to notify them of actions taken.

Sage Employee Self Service can send emails and post notifications when an action (such as request for approval, benefit update, time off request, interview invitation) has been taken. If you set up the system to send emails, you should verify that email addresses have been entered for your Sage HRMS employees. You can use the Update Email Addresses process to verify that all your employees have email addresses.

**Tip:** For detailed instructions:

1. In Sage HRMS from the Navigation Pane, select Employees > Update Email Addresses.
2. Click to open context-sensitive Help and follow the instructions. When the process is complete, all employees have email addresses as defined by the process.

Reviewing attendance plan setup

In Sage HRMS, do this step if you want employees to be able to submit time off requests.

Sage Employee Self Service lets employees submit time off requests, which are approved and then transmitted to the employee’s Sage HRMS attendance plans. In order for the Time Off Request function to work correctly and without errors, you must verify that each attendance plan has been set up with unique absence reason codes. That is, you cannot have more than one plan with the same absence reason codes.

Setting up Sage Employee Self Service

Each Sage Employee Self Service page available to the employee and manager can be tailored to meet the needs of each employer or for the entire enterprise. When you define page settings, you build the automated process that passes information and tasks from one person to another for some kind of action. These actions can be the ability to view a page, change, or add data on a page, receive a notification of a change or addition, and approve or reject a change or addition.

Setting up pages

Before you set up pages, you must determine whether you want the settings to apply to a specific employer or to the entire enterprise such as all employers in your system. Page settings for a specific
employer only apply to that employer; page settings for the enterprise apply to all employers in your Sage Employee Self Service system.

For each employer (or the entire Enterprise) and each page in Sage ESS, you can define the following information:

- **Access type.** Determines whether the page can be updated, whether updates need approval and whether notifications need to be sent to specific administrators.

- **Approval role.** If updates to the page need approval, this is the role that must approve the updates. The person assigned to the approval role must approve the updates before the data is saved to Sage HRMS.

- **Notify role.** When employees update the page, this is the role notified of the update. You can select up to two notify roles.

- **Custom Content.** On each page, you can add additional custom content. This includes web links (navigation to a specific website from the page), file links (navigation to specific documents from the page), a View URL (created using the View Builder), and custom text (user-defined text to communicate page-specific information to the employee).

**Tip:** For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User.
2. From the Administrator menu, select **System Settings > Employer Setup** and click the **Page Setup** tab.
3. Click and follow the instructions for Page Setup.

### Defining display, Message Center, and email settings

In Sage Employee Self Service, perform this step to set up message center and email information, as well as how various fields are displayed to the user.

Use the **Settings** tab on the **Employer Setup** page to set up reminders that are posted to the Message Center when an employee’s birthday, performance review or employment anniversary is upcoming. You should also define settings for displaying the Smoker field, Employer Benefits Contribution information, Salary Grades, and Step Rates.

You can set this information for a specific employer or for the Enterprise.

**Tip:** For detailed instructions:
1. In Sage Employee Self Service, log on as the Master User.

2. From the System Administrator menu, select **System Settings > Employer Setup**, select the employer and click the **Settings** tab.

3. Click 🖼 and follow the instructions for Settings.

### Defining custom content

In Sage Employee Self Service, perform this step to add custom content to pages. For example, you might want to add a hyperlink on a Benefit page that will take the user to a Benefits Guide document. You can add text references, file links, a View URL (created using the View Builder), and web links.

You can set this information for a specific employer or for the Enterprise.

**Tip:** For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User.

2. From the System Administrator menu, select **System Settings > Employer Setup**, select **Employer** and click the **Custom Content** tab.

3. Click 🖼 and follow the instructions for Custom Content.

### Assigning roles

In Sage Employee Self Service, perform this step to assign roles to employees. Each individual using Sage Employee Self Service has one or more roles that define their access rights, approval authority and notification settings.

### Administrator roles

Unlike employees who use the system for normal self-service functionality, individuals who perform administration for an employer’s human resources, training, or benefits departments need additional rights and authority to perform their duties in Sage Employee Self Service.

Each administrator role enables an HR, Benefit, or Training Administrator to act on approval requests and receive notifications. When you assign these administrator roles, you assign employees to administrator roles as well as determine the employers for which the administrator has authority to approve requests and receive notifications.
Benefit administrators can also set up benefit functionality, open enrollment, and life events. For example, a benefit administrator can determine the parameters for an open enrollment period, including the length of the open enrollment period and in which benefit plans the employee can enroll.

**View Builder roles**

View Builder is a Sage Employee Self Service feature that allows an employee to create a View (similar to a template) that generates data output. This allows employees who are regular Sage ESS users (such as Human Resources Generalists) to share data with employees who may not use Sage ESS (such as upper-management). After creating a View, it can be distributed as a URL link in an email message or saved as a Microsoft Excel Web Query file (*.iqy).

Sage Employee Self Service includes two system-defined roles for View Builder users:

- **View Creator.** You must assign this role to any employee you want to have access to the View Builder. When you assign an employee the View Creator role, the employee will be able to view all data in all employers you assign them to. In addition to the View Builder menu item, the employee will have access to the **System Settings > Employer Setup, Create Custom Menu, User-defined Fields, Custom Content > Create Web Links** and **Create File Links** on the **System Administration** menus when you assign this role.

- **Executive Viewer.** This role allows an employee to view all of the data in the company they are assigned to. To create a View for an employee assigned this role, select **Executive Viewer** in the **Access Level** field on the Format View page of the View Builder page.

You can also create a custom View Builder role. This is available for companies who may need to have more levels of access to views for various sets of employees. From the Administrator menu, select **Roles and Logon > View Builder Roles** to create custom roles.

**Tip:** For detailed instructions on assigning admin and view builder roles:

1. In Sage Employee Self Service, log on as the Master User.

2. From the System Administrator menu, select **Roles and Logon > Assign Admin Roles**, click 🔍 and follow the instructions.

**Setting up logon parameters**

In Sage Employee Self Service, perform this step to define the rules by which employees are permitted to log on.
When an employee attempts to create a new logon, they are required to enter the information you select in this step.

Your selections must ensure that the information the employee enters is unique. You must select at least one initial logon field, but to uniquely identify employees, you might need to select more than one field. For example, if a company has more than one Robert Smith, you would need to require more than just first and last name for the employee to create a logon. In this case, you could require first name, last name, and social security number or social insurance number.

**Note:** The Social Security Number (or Social Insurance Number) does not display when entered on the Create New Logon page or the Change or Reset Password page. Instead, it is masked the same as a password.

These rules apply to all employees in all employers in your system and include:

- Information an employee must provide to set up a logon and access the system
- What types of employees (status) are permitted to log on
- Employee logon history
- Password properties, for example, length or expiration
- When an employee can be locked out
- Security questions to ensure the employee provides the correct answer for a password change or reset

**Tip:** For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User.
2. From the System Administrator menu, select **Roles and Logon > Logon Setup**, click and follow the instructions.

### Defining system settings

In Sage Employee Self Service, perform this step to define settings for all employers.

The System Setup page is used to establish various parameters for your Sage Employee Self Service system. When you define settings on this page, they are defined for all Sage HRMS employers (similar to Enterprise Setup in Sage HRMS). The following parameters can be set on this page:
- **Archive Messages.** Determines whether or not approved requests are archived.

- **Display All Training Courses.** Determines if all courses or only the employee’s required courses are available to the employee to enroll in.

- **Display Home Page.** Home Page On or Off.

- **SSN/SIN Display Settings.** Do not Show/Show Last 4/Show.

- **View Indirect Reports.** Determines whether managers can see information for their indirect reports.

- **Search Phone List By.** Sets the organization level by which an employee can search through the employee phone list.

- **Display Pay History Before Published Date.** Indicates if your employees can view their pay history data before their pay day.

- **Display Pay History From.** This date determines how much pay history information (hours, gross pay, deductions, taxes, and net pay) is shown on the employee’s Pay History page.

- **Display Employment History From.** Determines how much compensation, job, and performance history information is shown to the employee.

- **Retain Audit Trail From.** Determines what audit trail history records should be kept in the system.

- **Technical Admin Email Address.** Specifies to whom unexpected error messages are sent.

- **System Emails Sent From.** Enter the email address in your company that you want to display in the From field of system generated email messages. The system does not verify that the email address is valid. Sage ESS uses this email address for various purposes. For example, Sage ESS populates the From field of the email message with this address if it cannot validate an address to be used as the From email address.

  SMTP (Simple Mail Transfer Protocol) must be set up and configured in order to send emails.

- **Display Available Fields.** Select how you want fields to display in the Available Fields list on the Select Data page of the View Builder:
  - **Grouped.** To display the list of fields in related groups. For example, job and pay-related fields such as Unit Pay Rate, Hours/Units, and Annual Pay display under the Job and Pay group. This allows you to expand a group to make individual selections or select a group to automatically select all fields in the group.
  - **Alphabetically.** To display the list of fields in alphabetical order without groups.
Setting up Sage Employee Self Service

- **View Server Application URL.** If the View Builder and the View Consumer access the system by different URLs, you can specify which URL will be used for the View Builder's Copy To Clipboard function. If you leave this field blank, the View Builder will use the same URL that is being used for the ESS application. If you want a different URL to be used, enter it here. This same View Server Application URL setting will be used for the Generate IQY File check box.

  **Tip:** For detailed instructions:

  1. In Sage Employee Self Service, log on as the Master User.
  2. From the System Administrator menu, select **System Settings > System Setup** to open the page. Click [?] and follow the instructions.

**Defining time off**

In Sage Employee Self Service, perform this step to define how employee time off functions.

The Time Off Setup page is used to define the way in which employee time off functions for each of your Sage HRMS employers. For example, you can choose whether the system sends a notification when an employee deletes a request or define a specific number of hours an employee is allowed to exceed their available balance. You must define Time Off settings for each employer in your system.

  **Tip:** For detailed instructions:

  1. In Sage Employee Self Service, log on as the Master User.
  2. From the System Administrator menu, select **System Settings > Time Off Setup**, select employer, click [?] and follow the instructions.

**Customizing Sage Employee Self Service (optional)**

In order for employers to represent the self-service application as an internal function, in Sage Employee Self Service you can customize the user interface. The list below shows the various ways in which you can customize your system. Open the referenced Help files for detailed instructions.

**Adding a custom message on the logon page**

The **Customize Logon Page** lets you select custom features for the logon page. Prior to customizing the logon page, you must create and upload stylesheets or graphics to be used on the logon page.

  **Tip:** Search for **customize logon page** in Help for instructions.
Chapter 4: Setting up Sage Employee Self Service

Adding a company logo and name

The Customize Employer page lets you select custom stylesheets and graphics for each employer in Sage Employee Self Service. This enables you to display a company logo and name prominently on all screens and change graphics and color schemes to be consistent with a company's branding.

Prior to customizing the styles and graphics for an employer, you must create and upload any stylesheets or graphics to be used for the employer.

**Tip:** Search for customize employer in Help for instructions.

Adding links to external Intranet or Internet sites

The Create Web Links page lets you create a link to a web page to help employees as they use Sage Employee Self Service. For example, you might want them to be able to view your company’s intranet access a View URL (created using the View Builder).

**Tip:** Search for create web links in Help for instructions.

Posting Company Documents

The Create File Links page lets you create a link to a document (such as a company directory, handbook, or organization chart) to help employees as they use Sage Employee Self Service. For example, you might want to give them the ability to view or print your company’s handbook.

**Tip:** Search for create file links in Help for instructions.

Adding a New Menu Item

The Create Custom Menu page lets you add new menu items to the existing menu for Sage Employee Self Service. For example, if your company has a company handbook, you can give your employees quick access to it by adding a menu item to the Employee menu.

**Tip:** Search for create custom menu in Help for instructions.

Adding Text to Pages

The Create Text References page lets you enter and format text you might want to add to a page to give employees more information about how to use the page. For example, you might want to give employees more information about the benefits listed on their Current Benefit page.
Displaying User-Defined Fields

You can select up to eight user-defined fields from Sage HRMS and payroll to add to the Personal Profile page.

Tip: Search for user-defined fields in Help for instructions.

Sage Employee Self Service System Maintenance

After you have installed Sage Employee Self Service, use the System Maintenance utility to configure your system, diagnose and troubleshoot errors, and check for invalid Sage Employee Self Service logons.

Using System Maintenance

The System Maintenance utility resides in a secure location on the server where Sage Employee Self Service is installed. To open the utility, you must have access to the Sage ESS server.

From the Start menu on your Sage Employee Self Service server, select All Programs > Sage Employee Self Service > System Maintenance.

You can use the System Maintenance utility to:

- Configure the program and default settings
- Perform SQL maintenance
- Reset the Master password
- Review server errors
- Review benefit calculation errors
- Create keys to link Sage Source
- Run the Duplicate Key report
- Remove invalid logons
- Configure Web security
- Create keys to link to add-on products
Chapter 4: Setting up Sage Employee Self Service

Configuration and Settings tab

This tab is used to review or modify system information such as the SQL database connection, Sage HRMS data location, your install code, serial number and product licensing. These are system-specific settings that must be configured in order for Sage Employee Self Service to function. The configuration values are set during the installation of Sage Employee Self Service, but you can modify them on this tab.

When you click **Save** to save your changes, the utility validates information on this tab and returns error messages when you enter invalid information.

**Important!** You cannot save any information in the System Maintenance utility or proceed with any other system maintenance functions until you resolve all validation errors.

**SQL Server section**

If you are using SQL Server Express Edition as your Sage Employee Self Service database, do not change any of the information in the SQL Server section.

- **Server Name.** Name of the SQL server where the Sage Employee Self Service database is located.
- **Database Name.** Name of the Sage Employee Self Service database. If you change the name of the database, enter the new name here. For example, you might have restored a backed up database and renamed it.
- **User Name and Password.** A valid SQL server user name and password is required to access the SQL server (this is the user name and password defined on the page). The user account must have dbo (database owner) permissions to access the database on the SQL server.

**Email section**

- **Enabled.** This option is selected after installing Sage Employee Self Service. Leave Enabled selected if you want Sage Employee Self Service users to receive an email whenever a notification is sent to the Message Center. If the customer does not need email or does not have the SMTP service configured yet, clear the check box.
- **SMTP Server.** Email server used by Sage Employee Self Service. SMTP should always be installed on the local server and be configured to forward email. The SMTP server name must always remain localhost or <Local Server Name> unless directed by Sage HRMS Customer Support.
Sage HRMS section

This indicates the Sage HRMS database type to which you are connecting. Select SQL Server to display the following:

- **Server Name.** Name of the SQL server where the Sage HRMS database is located.
- **Database Name.** Name of the Sage HRMS database. If you change the name of the database, enter the new name here. For example, you might have restored a backed up database and renamed it.
- **User Name and Password.** A valid SQL server user name and password is required to access the Sage HRMS database. The SQL Server logon must have SA (System Administrator) permissions.

Sage Employee Self Service section

- **Locked.** Select this check box to lock Sage Employee Self Service, which will log off any employee currently logged on and prevent other employees from logging on. This allows you to perform tasks such as backing up and restoring the Sage Employee Self Service database.

  **Warning!** If anyone using Sage Employee Self Service makes changes between the time the Sage HRMS and Sage ESS databases are backed up and the time the databases are restored, those changes are lost (including notifications, employee requests, and pending changes) when you restore the database because the data was not yet posted to Sage HRMS. This means that anyone who made a change must re-enter his or her changes. To avoid this situation, lock the Sage ESS database before you do a backup and then unlock it only when you are sure you do not have to restore the database.

- **Session Timeout.** Duration of inactivity (in minutes) before someone is automatically logged off from Sage Employee Self Service. Enter a value between 0 and 999.

- **Serial Number and Installation Code.** Information used to determine the employee license count and which Sage Employee Self Service modules are installed and available. Customer Service provides this number. The Installed Components and User Licenses reflect the current configuration and change accordingly if you enter a new serial number and installation code to add new components or more user licenses.

- **Save.** The system validates the configuration and settings and returns a message if there are invalid entries.

- **Reset.** Returns all fields to the values prior to the most recent time you opened System Maintenance.
- **Generate Master Password.** Changes the Master user password to a secure code that can be copied to your clipboard and pasted when logging onto Sage Employee Self Service. You can change the Master password to a password of your choice in Sage Employee Self Service under Roles and Logon > Change Password.

## SQL Maintenance tab

This tab is used to back up or restore your Sage Employee Self Service database.

In order for the Sage Employee Self Service and Sage HRMS databases to stay synchronized, whenever you back up or restore your Sage Employee Self Service database, you must also do the same operation in Sage HRMS.

**Warning!** If anyone using Sage Employee Self Service makes any changes between the time the Sage HRMS and Sage Employee Self Service databases are backed up and the time the databases are restored, all changes are lost (including notifications, employee requests, and pending changes) when you restore the database (because the data was not yet posted to Sage HRMS). This means that anyone who made a change must re-enter his or her changes. To avoid this situation, lock the Sage Employee Self Service database before you do a backup and then unlock it only when you are sure you do not have to restore the database.

Before using the SQL Maintenance tab, note that the \Sage Software\Employee Self Service\CustomFiles folder on the web server is not backed up during the backup procedure. This is the folder where custom style sheets and custom graphics are uploaded when you perform the Sage Employee Self Service Load to Server operation. If you have uploaded files, you should do a separate, manual backup of this folder whenever you back up your database.

Also, if you saved any custom files in the \Sage Software\Employee Self Service\Web folder (such as in Web\CSS or Web\Images), do a manual backup of these folders.

- **Backup File Path.** This is the location and name of your Sage Employee Self Service database backup file. Confirm that it is correct.

- **Backup.** Click **Backup** and confirm the action to start the process. An indicator shows the process as it runs and a message displays when it is finished.

- **Restore.** Click **Restore** and confirm the action to start the process. An indicator shows the process as it runs and a message displays when it is finished.

**Note:** If you restore a database that was backed up in a previous version of Sage Employee Self Service, the system automatically upgrades the database to the latest installed version during the restore process.
- **Upgrade Database.** Do not use this unless directed by Sage Customer Support.
- **Key Update.** Do not use this unless directed by Sage Customer Support.
- **Apply Fix File.** Do not use this unless directed by Sage Customer Support.

### Server Errors tab

This tab displays a message for each critical Sage Employee Self Service error. The messages contain the following information:

- The error message
- The user that caused the error
- Client information
- Server information
- Complete SQL trace, if applicable

After you select a SQL error on the Server Errors tab, you can view a description of the error. You can also select any of the following items for additional information on the error:

- Environment
- Message
- Source
- Stacktrace
- Targetsite

Because error messages written to the server’s event log may contain user data, for security purposes you can use the Abbreviate Logged SQL Errors option. When you select the check box, the system will “crop” server error messages, abbreviating them to the first few characters. However, because this is likely to strip off information that could help determine the cause of the error, you can also clear the check box to log the full server error.

You can also click **Open File** and navigate to the error log on the server (\Sage Software\Employee Self Service\Log) to open the error file. Note that when a server error occurs in Sage Employee Self Service, the employee sees a high level description of the error and has the ability to send the error to the technical administrator.
Benefit Calculation Errors tab

The system keeps a daily log of all benefit calculation errors and provides the ability to access the log files on this tab. You can click a file to see the expressions that caused the calculation error. However, this information does not provide the location in Sage HRMS where the errors occur.

The error log is also available on the server at \Sage Software\Sage Employee Self Service\Log.

Duplicate Key Report tab

Use this tab to run a report to display all Sage HRMS records that have identical keys. When someone working in Sage Employee Self Service attempts to open a page with records that contain duplicate keys, the system generates the message “No records could be displayed. Contact your Human Resources department for assistance.” For the reason, you should run this report and delete all duplicate records before allowing anyone to log on to Sage Employee Self Service for the first time.

**Tip:** Run this report every couple of months at a time when the Sage HRMS database is not heavily used.

The duplicate key report examines Sage HRMS tables used by Sage Employee Self Service and displays each table where duplicate keys are found, a list of the columns that make up the key (the combination of all data in these columns should be unique), and a list of column value combinations (keys) that have multiple matching records in the table. Refer to Tables and Keys used by Sage ESS for a list of the keys in Sage HRMS tables used by Sage Employee Self Service.

You can resolve these conflicts through the Sage HRMS client by changing information in fields for the records listed or you can correct duplicate records directly in the SQL tables.

**Caution!** If you do not have access to Microsoft SQL Server or do not have experience modifying tables, contact your implementation specialist before proceeding. You can also contact Customer Support for assistance.

For tables that contain records that are connected to individual employees, an additional column with the employee name is shown in the duplicate record listing. For example, the preceding figure shows that empno 3055 has a duplicate record. The following Skills page for empno 3055 in the Sage HRMS client shows two COMPUTER skill codes. To fix the duplicate record for this employee, delete one of the records.
To save or print the report as an .RTF file, click **Export**.

### Remove Logins tab

This tab opens logins that are no longer associated with Sage HRMS employees. Select a Login Name and click **Remove Logins** to remove it from the Sage Employee Self Service Users database (tUSERS). An employee user license becomes available for each invalid login name that is removed.

You can also use this page to see all users (with valid or invalid logons) in the Sage HRMS Employee database.

1. Double-click the image in the upper left corner of the System Maintenance utility to reveal the **Show All Users** check box.

2. Select the **Show All Users** check box to display all employees with logins to the system.

3. With all employees displayed, you can proceed to select and remove all employees from the Sage Employee Self Service Users database (tUSERS). This option is useful if you are moving customer data from a test environment to a live environment.

**Warning!** If you select **Show All Users** and click **Remove Logons**, the system irrevocably deletes all employee, manager, and administrator data in Sage Employee Self Service. This includes notifications, pending benefit elections, and time-off requests. You should never remove logons without first creating a backup of your Sage Employee Self Service database.

### Web Security tab

This page is used to configure the URLs and Client IP addresses that can create a session using the internal and external entry points to Sage Employee Self Service. Use this page to restrict internal and external users’ access to your Sage Employee Self Service system.

1. From the Start Page drop-down list, select the page that should open when the user logs on:
   - **Employee / Administrator**: Select this to open the internal start page (the Sage ESS Logon page).
- **View Consumer.** If you are using the Employee Analytics capability, select this to open a page created with View Builder.

2. In the http(s) field, enter the server/DNS name of all servers you want to allow when requesting the selected start page. Click Add to add the name to the list (if the list is empty, there are no restrictions). Note that the following characters are not permitted as part of a server name: `~!@#$%^&*()|=\{}[];"'<,/

3. In the IP field, enter four sets of numbers that make up a Client IP address. Click Add to add the number as an allowable address when requesting the selected start page (if the list is empty, there are no restrictions). For each IP box, enter up to three characters. Note that only the following characters are allowed: 1 2 3 4 5 6 7 8 9 0 * ?

4. Restart IIS. This is required whenever you make a change to Web Security. Follow either of the steps below to restart IIS.
   - From an MS-DOS prompt, type `iisreset` and press Enter.
   - Click on the Start menu and select **Administrative Tools > Services.** Right-click **World Wide Web Publishing Service** and select **Restart.**

**Keys tab**

Use the arrows on the tab bar to navigate to the Keys tab. You can generate keys, secure codes to link systems, to connect with Sage Source and third party applications.

**Generate Keys.** This button provides you with the ability to generate keys for single sign-on services for your employees.

**Recommended setup**

Limit the **Employee / Administrator** page (internal entry point) to a DNS or wins name of the server that is designated for Sage Employee Self Service / internal use. Optionally, if employee access over the Internet is not desired, limit the Client IP addresses to only those that match the company Intranet.

Limit the **View Consumer** page (internal entry point) to a DNS or wins name of the server that is designated for Sage Employee Self Service / internal use. Optionally, if view access over the Internet is not desired (that is, you will only distribute View output as Microsoft Excel Web Query (*.iqy) files), limit the Client IP addresses to only those that match the company Intranet.
Appendix A: Tables and keys used by Sage ESS

This is a list of all the Sage HRMS tables that are used by Sage Employee Self Service. The values in each of these key columns must be unique. For information on running a Duplicate Key report, see the Duplicate Key Report section of this guide.

When importing data from a third-party system to Sage HRMS, these key columns must be populated and no two records in these tables should have identical values. If there are any duplicate records, they must be removed so that Sage Employee Self Service can correctly read the data.
<table>
<thead>
<tr>
<th>Table name</th>
<th>Table</th>
<th>Key columns</th>
</tr>
</thead>
</table>
| Attendance Benefit Plan Definition| HATPLAN     | P_COMPANY - Company Code  
P_ID - Plan ID  
P_RULE - Rule Record                                                   |
| Employee Attendance Summary       | HATSUM      | T_COMPANY - Company Code  
T_EMPNO - Employee ID  
T_ID - Plan ID Code                                                          |
| Benefit Rate Setup                | HBEDEF      | D_COMPANY - Company Code  
D_ID - Rate Table Code  
D_RULE - Rule Record                                                          |
| Beneficiary Enrollments           | HBENBEN     | B_BENECODE - Benefit Plan Code  
B_BENEID - Insurance or Savings  
B_COMPANY - Company Code  
B_DEPID - Dependent ID Number  
B_EMPNO - Employee ID                                                              |
| Employee Benefit                  | HBENE       |                                                                           |
| Benefit Plan Table                | HBEPLAN     | BT_BENEID - Benefit Type Code (I/S)  
BTCOMPANY - Company Code  
CODE - Benefit Code                                                             |
| Benefit Rate                      | HBERES      | R_COMPANY - Company Code  
R_ID - Rate Table ID  
R_ORDER - Order                                                                |
| Dependent Benefits                | HDEPBEN     | D_BENECODE - Benefit Plan Code  
D_COMPANY - Company Code  
D_DEPID - Dependent ID Number  
D_EMPNO - Employee ID                                                           |
| Employee Dependent                | HDEPEND     | D_COMPANY - Company Code  
D_EMPNO - Employee ID  
D_DEPID - Dependent ID Number                                                   |
<p>| Employee Education History        | HEDU        | E_COMPANY - Company Code                                                    |</p>
<table>
<thead>
<tr>
<th>Table name</th>
<th>Table</th>
<th>Key columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Emergency Contact</td>
<td>HEMERG</td>
<td>E_COMP - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E_EMPNO - Employee ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E_CODE - Event Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E_COMP - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E_EMPNO - Employee ID</td>
</tr>
<tr>
<td>Employee Event</td>
<td>HEVENTS</td>
<td>N_COMP - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>N_DCOMMENT - Employee Note Entry Date</td>
</tr>
<tr>
<td></td>
<td></td>
<td>N_EMPNO - Employee ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>N_TYPE - Employee Note Type Code</td>
</tr>
<tr>
<td>Employee Notes</td>
<td>HRENOTES</td>
<td>P_COMP - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>P_EMPNO - Employee ID</td>
</tr>
<tr>
<td>HR and Payroll Code Table</td>
<td>HRTABLES</td>
<td>CODE - Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FRULE - Rule indicator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FTABLE - Table ID</td>
</tr>
<tr>
<td>Employee Skill</td>
<td>HSKILLS</td>
<td>S_COMP - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>S_EMPNO - Employee ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>S_SKILL - Skill Code</td>
</tr>
<tr>
<td>Employee Wellness</td>
<td>HWELL</td>
<td>W_COMP - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>W_EMPNO - Employee ID</td>
</tr>
<tr>
<td>Course Catalog</td>
<td>NCATCOUR</td>
<td>COMPANY - Company Code</td>
</tr>
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<td></td>
<td></td>
<td>COURSE - Course Code</td>
</tr>
<tr>
<td>Instructor Catalog</td>
<td>NCATINST</td>
<td>COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>INSTRCODE - Instructor Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>P_COMP - Employer Code of Employee Record</td>
</tr>
<tr>
<td></td>
<td></td>
<td>P_EMPNO - Employee ID of Employee Record</td>
</tr>
<tr>
<td>Training Location Catalog</td>
<td>NCATLOCA</td>
<td>COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>LOCATION - Location Code</td>
</tr>
<tr>
<td>Table name</td>
<td>Table</td>
<td>Key columns</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Class Information</td>
<td>NCLINFO</td>
<td>COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COURSE - Course Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>STARTDATE - Date Class Begins</td>
</tr>
<tr>
<td>Employee Certifications</td>
<td>NEMPCERT</td>
<td>CERTCODE - Certification Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>EMPNO - Employee ID</td>
</tr>
<tr>
<td>Employee Required Courses</td>
<td>NEMPREQU</td>
<td>COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COURSE - Course Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>EMPNO - Employee ID</td>
</tr>
<tr>
<td>Benefit Rate Setup for Open</td>
<td>OEBEDEF</td>
<td>D_COMPANY - Company Code</td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td>D_ID - Rate Table Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>D_RULE - Rule Record</td>
</tr>
<tr>
<td>Benefit Plan Table for Open</td>
<td>OEBEPLAN</td>
<td>BT_BENEID - Benefit Type Code (I/S)</td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
<td>BT_COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CODE - Benefit Code</td>
</tr>
<tr>
<td>Benefit Rate for Open Enrollment</td>
<td>OEBERES</td>
<td>R_COMPANY - Company Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>R_ID - Rate Table ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>R_ORDER - Order</td>
</tr>
<tr>
<td>Employer Setup</td>
<td>SYEMPLOY</td>
<td>E_COMPANY - Company Code</td>
</tr>
<tr>
<td>Enterprise Setup</td>
<td>SYENTER</td>
<td>E_FEDTAXID - Federal Tax Identifier</td>
</tr>
</tbody>
</table>