Product Update Release Notes

Important! All customers who update, maintain, and use Sage HRMS Canadian Payroll should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Product Update Information


Version: Product Update January 1, 2017

Important! We identified a specific data scenario with direct deposit that may cause an error upon installing the Q2 2016 product update. Direct deposit (EFT) allocations greater than 100% of net pay are no longer supported in payroll. This means that if you have employees with multiple direct deposit bank accounts and more than 100% of net pay specified, you must edit affected employees' percentages before installing the Q2 update. We created an SAP Crystal Report to help you identify which employees must be updated. See Knowledgebase article 76833 to download the report and for detailed instructions.

About Product Updates for Sage HRMS

Sage HRMS Payroll product updates are cumulative. This means that supported taxes, rates, and forms, all previous updates for this product and version, and any hot fixes or patches previously released are incorporated into this update.

Sage Employee Self Service product updates include the full product build.

Important Information Regarding Future Updates

The following chart outlines the Sage HRMS product versions supported with Product Updates or Quarterly Tax Updates for each period this year.
<table>
<thead>
<tr>
<th>Release</th>
<th>Q1 2016</th>
<th>Q2 2016</th>
<th>Q3 2016</th>
<th>Q4 2016</th>
<th>Q1 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sage HRMS 2015</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Last Update</td>
</tr>
<tr>
<td>Sage HRMS 2016</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**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.
- **Sage City:** Visit https://sagecity.na.sage.com for blogs, tips, and guidance specific to Sage HRMS.
- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at https://support.na.sage.com or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Sage Customer Number handy when contacting Support.
Payroll Tax Updates

The following provincial and territorial tax changes are included in this update.

Provincial and Territorial Legislative Updates

This section lists provincial and territorial legislative updates available with this release. If a province or territory is not listed in this section, there are currently no tax updates or product modifications for that province or territory. For details about each update, review the CRA July 1, 2016 government publication or visit the CRA website.

British Columbia

Effective for the 2016 tax year, the B.C. tax reduction phase-out threshold and phase-out rate have increased.

New Brunswick

Effective for 2016 and subsequent tax years, the top marginal personal income tax rate (for income over $250,000) has been eliminated, and the tax rate for income over $150,000 has been reduced.

Newfoundland and Labrador

- Effective for the 2016 tax year, tax rates have increased.
- Effective July 1, 2016, Newfoundland and Labrador residents will be subject to a new Temporary Deficit Reduction Levy based on individual taxable income. Individuals with taxable income of $50,000 or less will be exempt. Factor V2 will also represent the levy.

Prince Edward Island

Effective for the 2016 tax year, the basic personal amount has increased. You must manually specify the prorated basic personal amount of $8,292 on the Employees window.
Québec

Effective for the 2016 tax year, the required health contribution has been reduced. For details about this update, review the Revenu Québec 2016 government publication or visit the Revenu Québec website.
Product Updates

The following product updates are included with this release.

Payroll Product Updates

The following new features and improvements to payroll are included with this update.

Prenote Status for EFT Bank Accounts

If you use EFT Direct Payroll, a new Prenote Status field appears on the EFT tab of the Employees window. This field indicates if you have sent a prenote to an employee’s bank, and whether the bank has responded.

Important! To make direct deposits into an employee’s bank account, the account must have a prenote status of Approved.

The prenote status for existing employee bank accounts is automatically set to Approved. No further action is necessary. If you add a new employee bank account, you must manually change the prenote status for the account to Approved after receiving prenote approval from the bank.

Display for Setup Title, Earnings/Deductions/Taxes

Prior to this release, when some customers opened the Setup > Payroll window in Sage HRMS Payroll, the title for the Earnings/Deductions/Taxes section may have displayed on two lines instead of one. This minor issue has been corrected.

Number of Active Employees

On the Company tab of the Options window, a new Active Employees field displays the number of employees you have whose status is Active. (Employee status is specified on the Class/Schd tab of the Employees window.)

HR Product Updates

The following new features and improvements are included with this update to Sage HRMS.
Errors Saving Job Codes

With this release we fixed the issue where some customers using the Canadian and U.S. configuration of Sage HRMS with Payroll would sometimes receive a runtime error message when attempting to add a new Job Code. (16894)

Training Programs Report

Prior to this release, the Training Programs report (Reports > Training > Catalogs and Code Tables) provided incorrect amounts in the Total Hours field. With this release, the totals are now derived from all training courses. (16920)

Sage 100 Integration to Support ACA ALE Report

With this release, we added a new field for Seasonal employees on the Sage 100 Payroll Setup window in Sage HRMS to support the Affordable Care Act ALE report in Sage 100. The new Seasonal field is set to No by default, and you must update it for each qualifying employee before using the link to update Sage 100. (16886)

Sage Employee Self Service Product Updates

The following new features and improvements are included with this update to Sage Employee Self Service.

Username Length

Prior to this release, some employees could not log into Sage Employee Self Service (version 2015) without receiving an error message (String or Binary data would be truncated...). This was due to the recent increase in the username field length (to 100 characters) and affected only customers who upgraded from version 2014 to version 2015. The issue was resolved and employees with long usernames (up to 100 characters) can now log in to Sage Employee Self Service successfully. (16928)

Training History Reports in ESS

Previously, some customers would receive an error message when viewing training reports in ESS if the employee(s) selected had completed approximately more than 200 courses. With this release the issue has been corrected. (16965)

Current Benefits

After installing the Sage ESS 2016, some customers received a 403 HTTP Forbidden error message when logging in with Internet Explorer and viewing the Open Enrollment > Current Benefits and Life Events >
Current Benefits pages. We corrected the issue. (16948)
Product Update Installation Instructions

Follow the instructions in this section to download, install, apply, and verify this Product Update.

Before you start:

- Back up your data.
- Make sure all users have exited the program.

Downloading the Product Update

To download the update:

1. Visit the Sage Knowledgebase at https://support.na.sage.com, click Log on, and then log on to the site.
2. In the Support by product section, click Select your product, and then click more products.
4. In the Latest updates section, click an update to download.
5. In the article, click Download Now to launch the Sage Download Manager, or click the direct download link to download the executable file.

Installing the Product Update

To install the Product Update:

Note: You should launch the product update on the server where Sage HRMS is installed.

1. To launch the installation program, right-click the Product Update file and run as administrator, or as the current user with administrator rights.
   - If applicable, make sure the Protect my computer and data from unauthorized program activity check box is not selected.
   - If there is no option to run as administrator, log on as an administrator, and then double-click the Product Update file.
The InstallShield Wizard appears.

2. After the Wizard determines requirements, click **Next** to resume installing the Product Update.

3. Click **Finish** to finish the installation.

4. Click **Update**.

5. Click **Yes**. The system starts the installation.

6. Follow the instructions on the windows that follow, and then click **Finish**.

7. Open the Sage HRMS Client. A message prompts you to continue.

### Updating Sage HRMS Client Files

**To update Sage HRMS Client files:**

1. Launch the Sage HRMS Client to initiate the file update process.

2. Click **OK** to proceed and update your files.

   A message displays that Sage HRMS could not detect the current version of one or more Payroll modules.

   - If you have administrator privileges, click **Yes** to install the Payroll modules now.
   - If you do **not** have administrator privileges, click **No**, and then contact your system administrator to proceed with the installation.

When installation of the Payroll modules is complete, you may be prompted to restart Sage HRMS.

### Verifying the Product Update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > About Sage HRMS** and verifying that the version number corresponds with the version of the update .exe file.

You can also verify the latest tax update is applied to your system by selecting **Payroll > Process Payroll > Calculate Payroll** and the **Tax Version** listed on the window should display the date: December 31, 2016.

**Tip:** Now is a good time to update your Sage HRMS Payroll sample data. After installing the Product Update, the next time you log in to your Sample Data, you will be prompted to update files again. Click **OK** to proceed and update your sample data files.
Sage Employee Self Service Update
Installation Instructions

After you have downloaded the Sage Employee Self Service update from the Sage Knowledgebase, follow these instructions to install the update and to resume your payroll processing.

Before you start:
- 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 Sage HRMS data.
- If you are using Sage Employee Self Service and/or 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.
- When the update is complete, you will be prompted to restart your system. Before you begin installing the update, make any necessary preparations for this required restart.

Downloading the Update

1. Visit the Sage Knowledgebase at https://support-na.sage.com, click Log on, and then log on to the site.
2. In the Support by product section, click Select your product, and then click more products.
4. In the Latest updates section, click an update to download.
5. In the article, click Download Now to launch the Sage Download Manager, or click the direct download link to download the executable file.

Important! During this installation process you must enter your Sage Employee Self Service username, organization name, serial number, and install code. You can find this information in System Maintenance under Start > All Programs > Sage Employee Self Service > System Maintenance.

Once you start the installation, your customer information clears from System Maintenance, so please copy or save a screenshot of your company’s product information to reference when prompted. Best practice is to collect this information before you start the update.
Installing the Sage Employee Self Service Update

1. **Using your external backup procedures, back up the Sage HRMS and Sage Employee Self Service databases to a media device that is external to your product servers:**
   a. Log on to the Sage Employee Self Service server and select Programs > Employee Self Service > System Maintenance to open the Sage Employee Self Service System Maintenance window.
   b. On the Configuration and Settings tab, in the Employee Self Service section, select the **Locked** check box, and then click **Save**.
   c. On the SQL Maintenance tab, verify the Backup File Path is correct, and then click **Backup**.
   d. Prepare to update Sage Employee Self Service by closing all Windows applications.
   e. Run the setup.exe file provided with the installation package with Administrative privileges (right-click the file and select **Run as Administrator**).

2. The installation program detects that a previous version of Sage Employee Self Service has been installed. Click **Next**, and then follow the prompts on the InstallShield Wizard.

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

4. The system displays Installation windows indicating the progress of the installation. When the InstallShield Wizard Completed window appears, click **Finish**.

   **Note:** One installation window prompts you to enter your customer information (username, organization name, product serial number, and install code). After you start the update process, your customer information clears from System Maintenance. Best practice is to collect this information before you start the update.

5. When the update is complete, click **Yes** to restart your system.

6. After your Sage Employee Self Service server restarts, from the Start menu, select **All Programs** > Sage Employee Self Service > System Maintenance to open the System Maintenance page. Verify that all the information is correct.

7. On the **Configuration and Settings** tab, clear the **Locked** check box.

8. Exit System Maintenance.

9. Log on to Sage Employee Self Service as the MASTER user to complete the process.

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