Sage HRMS 2017 and Sage Employee Self Service 2017

Release Notes

May 2017

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Introduction

Release Information

Product: Sage HRMS and Sage ESS

Version: 2017

About This Upgrade

This document describes enhancements and modifications in Sage HRMS and Sage Employee Self Service specific to version 2017. All customers who update, maintain, and use Sage HRMS should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

> **Important!** Before upgrading, consult with your business partner or Sage to ensure that this update is compatible with customizations, integrated third-party applications, and other configuration options. If you install this update independently, you assume responsibility for any impact on your system.

You need all of the following to install this upgrade:

- The Sage HRMS 2017 installation package, available as an electronic download from the Sage Knowledgebase at https://support.na.sage.com. Log in and search for download article 83509.

- The Sage Employee Self Service 2017 installation package, also available as an electronic download from the Sage Knowledgebase at https://support.na.sage.com. Log in and search for download article 83512.

- SAP Crystal Reports version 2011, also available as an electronic download from the Sage Knowledgebase under article 50162.

- The Hardware and Software Recommendations for Sage HRMS and Sage ESS 2017, available on the Sage Knowledgebase under article 83549.

- The Sage HRMS 2017 Installation Guide.

- The Sage Employee Self Service 2017 Installation and Setup Guide.

> **Note:** You can find all of the latest documentation and guides on the Sage HRMS Product Documentation website, also linked from the help menu in Sage HRMS.

Important Upgrade Information

Before you upgrade

- There are several procedures you must complete on your current system to prepare it for the upgrade. These procedures are provided in the Installation Guides for Sage HRMS and Sage ESS. It is imperative you review the procedures before you install the upgrades.

- You must log on as a user with administrative privileges before you can upgrade a client workstation.

- If you use Sage HRMS Payroll, complete all payroll processing and print all payroll checks.

After you upgrade

- Make sure your quarterly payroll taxes are current to this quarter and release. To install the latest tax updates, visit the Sage Knowledgebase at https://support.na.sage.com and search for the latest payroll update.

- Review your **Group Security** to make sure the new menu items are set to **Allow Access** for the appropriate users. The MASTER user automatically has access to all new functionality after the upgrade.

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 linked from within the Sage HRMS help menu.

- **Sage University:** Learn pro tips for Sage programs in online or classroom courses. Visit http://SageU.com and log on or create an account to register for training.

- **Sage City:** Visit http://sagecity.na.sage.com/ for blogs, tips, and guidance for your Sage programs.

- **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 from the U.S. and 800-330-2607 from Canada. Please have your Customer ID handy when contacting Support.

Human Resources

The following new features and improvements are included with this release.

Customizing the Sage HRMS Logon Window

With this release, you can now customize the text that displays on the logon window for Sage HRMS. To customize the text on the window, go to Setup > System > Enterprise Setup and click the Customize Logon tab. Enter a message for your Sage HRMS users that's up to 254 characters and save.

Dependents and Beneficiaries Feature Enhancements

We enhanced the Dependents and Beneficiaries features in Sage HRMS 2017 so you can make updates while working on the plans or updating employees. The enhancements include:

- **Assigning multiple beneficiaries and covered dependents at once.** You can now update multiple dependents or beneficiaries for an employee at once. Use the **Covered Dependents** or **Assign Beneficiaries** windows (Employees > View/Edit Employee > Benefits > Insurance Benefits) to assign and select more than one dependent or beneficiary at a time.

- **Adding beneficiaries while assigning plans.** You can now add new beneficiaries to your employees' plans while you are assigning insurance and savings plans in Sage HRMS. When adding plans to an employee, click the **Add** button in the beneficiary selection window, and complete the fields to immediately add the beneficiary to the employee's plan. The beneficiary is then added to the employee's Dependents and Beneficiaries.

- **Adding dependents "on the fly."** You can now add a new dependent to an employee's record when you're viewing the employee's **Covered Dependent** window. Click the **Add** button and complete the fields to add the dependent to the employee's Covered Dependents and the same information updates the employee's Dependents and Beneficiaries.

New Context-Sensitive Web Help

We updated the context-sensitive help for Sage HRMS and published it to the web. You can use any browser to open web help for Sage HRMS. And when you click a help icon from any window in the program, the web help launches in a new tab of your browser. Web help is published live and updated regularly at http://help-hrms.na.sage.com. If you or your Sage HRMS users don't have access to the

Internet, you can still access the installed help from the program folders (Program Files (x86) > Sage > Sage HRMS Client > Help).

Sending Emails to Employees from Demographics

With this release, you can now email an employee from the **Demographics** page where you enter the employee's email address. Click the **Mail** icon next to the employee's email address field, and your default email program will open a new blank message with the employee's email address entered.

Job Codes Description (Job Title) Field Length

We updated the Job Codes Description field length and increased it from 25 characters to 60 characters. The Job Code Description displays as the Job Title on the employee detail page (Employees > View/Edit Employee > Job and Pay > Current Job). Note that any reports that show the job code description displays only the first 25 characters.

Employee Notes Field Length

Now you can view up to 50 characters of notes for employees in the Notes column of the Employee Notes Summary window (from the previous 21-character limit).

Cross-Employer Transfer

We corrected an issue where some information from the **Employee Notes** from employee records were not transferred with the **Cross Employer Transfer** process. The Employee Notes and all comments now transfer successfully. We also fixed an issue where the **Steps to Cross Employer Transfer Task** was updated for the original employer, when it should update the task for the new employer. (14290, 16942)

Using Copy Plan (to Copy Insurance Plans)

With this release we corrected the issue where some customers would receive an error message when using the **Copy Plan** feature (Setup > Employees > Benefits > Insurance Plans or Savings Plans). You can now copy insurance and savings plans successfully.

> **Note:** To copy employees and dependents from the old plan to the new plan, the employee (and dependent) enrollment dates for the plan you copy must fall within the new plan start and end dates. (17141, 17171)

Seniority Level Accruals Carryover

Prior to this release, some customers experienced a problem with the maximum available and maximum carryover hours for employees with the seniority level of 10. We fixed the issue, and employees with all seniority levels will carry over the correct time off accrual balances. (16949)

Secure Query and CTRL+U

Previously, some customers experienced an issue where the **Secure Query** settings would reset to the defaults when they used the keyboard shortcut CTRL+U to upgrade the database. This issue has been corrected and Secure Query settings remain unchanged when you use the keyboard shortcut. (16848)

Employee Search

We removed the "Search by ID or Name" field from the Employee detail pages to address application stability issues ("Abra32.exe has stopped working" errors). (16952)

Updated Sample Data

The sample data (U.S. and Canadian employers and payroll companies) is updated to demonstrate the latest features available in Sage HRMS.

Sage HRMS Payroll

The following new features and improvements are included with this release.

Payroll Upgrade

With this release, we upgraded the payroll module version from 7.2 to 7.3, and we upgraded the supporting modules (Bank, System Manager, and General Ledger) from version 6.1 to 6.4. The version upgrade creates new version-specific folders where your company data and files are stored.

If you customized the standard reports that come with Sage HRMS Payroll (such as the Bank Reconciliation or Chart of Accounts reports), your customized RPT files must be manually moved to maintain the customizations after upgrading. See Knowledgebase article 71417 for more information about maintaining customized standard reports.

> **Caution!** Standard reports in the Bank and General Ledger folders will be overwritten during the upgrade. If you have customized Bank or General Ledger reports (saved to the [Drive]:\ProgramData\Sage\SageHRMSServer\Payroll\CustomReports**GL61A**\ENG and **BK61A**\ENG folders), you must save a copy of the RPT files to a safe location before installing the upgrade. After installation, you can add your customized RPT files to the GL64A and BK64A folders.
>
> See the Sage HRMS 2017 Installation Guide for steps to move customized standard reports.

G/L Override for Earnings and Deductions

You can now use the **Cost Center Override** feature to update earnings and deductions in payroll with changes you make to related General Ledger codes. For example, if you add a new G/L segment code or change an Org Level (mapped to a cost center), you can use the **Payroll > Process Payroll > Open Payroll** process to include the changes in each earning, deduction, and tax in payroll. To use the feature, after you select the Profile ID on the **Open Payroll** window, click **Advanced Options**, and select **Overwrite Cost Center Overrides**. Then, when you click **Process**, the system updates any applicable G/L segments for the employees' earnings and deductions.

> **Note:** Before you can start using the **Cost Center Overrides** feature, you must select the **Use Cost Center Overrides** check box on the **Integration** tab of the **Setup > Payroll > Payroll G/L Integration** window and set up the employees' G/L segments. After selecting the check box, you can define the

Delete Multiple Timecards in Timecard List

With this release, you now have the ability to delete multiple timecards at once on the **Payroll > Process Payroll > Timecard List** window. To delete multiple timecards at once, use the filter criteria (Active, Inactive, by employee, and so on) to display the timecards you want to delete, and then click the **Delete All** button. Use this feature with caution, as all timecards that show in your list will be deleted when you Delete All.

Number of Active Employees

On the **Company** tab of the **Setup > Payroll > Options** window, a new **Active Employees** field displays the number of employees you have whose status is Active. The employee status is specified on the Class/Schd tab of the **Employee Payroll** window.

Withholding Cap for Tax Bracket Table Calculation Method

On the **Local/Other Tax Codes** setup window, if you specify **Tax Bracket Table** as the employee calculation method (on the **Basic Info** tab), you can now specify an annual maximum withholding amount (on the **Employee** tab).

Specify Service Class Codes

On the **Setup > Payroll > EFT Options** window, you can now change the service class code.

Specify Taxes for Advances

When setting up an advance in the **Earnings/Deductions Codes** setup window, the **Subject to the Following Taxes** field is now available on the **Employee** tab. This field allows you to specify the taxes that the earning/deduction is subject to.

> **Note:** Taxes for advances and repayment deductions are calculated differently than they were previously. To ensure that taxes are calculated correctly for a taxable advance (and the corresponding repayment), ensure that you specify the same taxes in the **Subject to the Following Taxes** field for both the advance and the corresponding repayment deduction.

Employees Consent to Receive Only Electronic W-2s (U.S. Payroll)

On the **Class/Schd** tab of the **Employee Payroll** window, you can use the new **Employee Consents to Receive Only Electronic W-2s** option to indicate if an employee has provided consent to receive their W-2s only in electronic form.

T4A File for CRA (Canadian Payroll)

New **T4As** and **T4As Electronic Filing** windows allow you to produce T4As, either as printed forms or files that you can submit to the Canada Revenue Agency (CRA) electronically.

Sage Employee Self Service

The following new features and improvements are included with this release.

Customizable Logon Reset Message

We added a new custom message field to the **Logon Setup** page. Administrators can now prepare a customized **Logon Reset Message** for employees when they have trouble resetting their passwords, or if they lose or forget their user names. We also changed the "Forgot Your Password?" link from the Logon page to "Username and Password Help."

After an unsuccessful attempt to reset the password or retrieve the username, your employees see the custom message. We recommend you add contact information for administrators at your company who can help the employees with their logons.

Instructions for Create New Logon Page

We added detailed information to the **Instructions** panel for using the **Create New Logon Page**. You must have access to this feature to view the instructions. Detailed information includes formatting and field requirements for fields on the page to help guide you through the process.

New Context-Sensitive Web Help

We updated the context-sensitive help for Sage Employee Self Service and published it to the web. You can use any browser to open web help for Sage Employee Self Service, and when you click a help link from within the program, help launches in a new tab of your browser. Web help is published live and updated regularly at http://help-hrms.na.sage.com/ESS/.

Processing Open Enrollments in Groups

Administrators can now process open enrollments in groups, view processed open enrollments, and specify rollout dates in the **Sage Employee Self Service > Benefit Updates > Process Enrollment** page. When you're ready to **Process Enrollments**, use the search which now includes All, Employee Last Name, and Organization Level options, to show groups of employees as you have defined them in Sage HRMS. When the page displays the employees by last name or group that you want to process, enter the

rollout date when this group of employees' open enrollment period starts, then click the **Save** button to process the open enrollments and notify your employees.

> **Tip:** View the **Process Enrollment** help topic for step-by-step instructions for this new feature.

Create Custom Menu Feature Enhancements

You can now add parent-level menu items and links to custom sites to the menu items using the **Create Custom Menu** feature. New menus you create are added to the bottom of the lists in existing menus. The order in which the menus appear cannot be changed at this time.

Employee Photos on Phone List and Direct Reports Pages

Administrators in Sage Employee Self Service can now see employee photos (if added) when viewing the **Company Phone List** and **Direct Reports Organization** pages.

Time Off Requests Statuses in Notifications

With this release, we updated the email notifications to include the **status** of the time off request. This information is helpful, especially for requests edited by your employees (if you have the functionality enabled). The notifications now identify if the *original* time off request is **pending**, **approved**, or **rejected** in the subject of the email. If an existing time off request was edited, the nature of the edit is also included in the notification.

Processing Time Off

Prior to this release, if an employee requested time off in Sage Employee Self Service and entered the word "FROM" in capital letters in the notes, some customers could not process the time off request. We corrected this issue. (17143)

Sage Integrations and Services

The following new features and improvements are included with this release.

Sage 100 Link ZIP Code

With this release, Sage 100 Link now successfully transfers the entire employee ZIP Code, including the additional 4 digits (ZIP+4 Code), if entered in the employee record in Sage HRMS. (16806)

Sage 100 Standard Link Reports

With this release, you can now print any of the Sage 100 Standard Link reports from the Preview mode, using a PDF printer or any other printer services you may have installed on your computer. (16815)