



Sage HRMS 2017

Q3 2017 SR2 Release Notes

November 2017

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Product Update Release Notes

Important! All customers who update, maintain, and use Sage HRMS and Sage 100 Payroll should read these release notes to obtain valuable information about changes to the software.

Product Update Information

Product: Sage HRMS

Version: Product Update Q3 2017 SR2

About This Update

This document describes enhancements and modifications to Sage 100 Standard Link and Sage 100 Payroll Link, the applications to integrate Sage 100 Payroll and Sage HRMS.

You need the following to install this update:

- The **Q3 2017 SR2 Product Update download**. The download is available on the Sage Knowledgebase at <https://support.na.sage.com> under Article ID **87370**.
- Sage 100 and Sage HRMS must be installed and set up.

Tip: Refer to the [Sage 100 Documentation](#) and [Sage HRMS Documentation](#) websites for instructions to set up and use each program.

Before You Update

- Complete all payroll processing and print all payroll checks in Sage 100 Payroll.
- Complete all Time Off absence transactions in Sage HRMS Time Off (if applicable).
- Run the **Sage HRMS to Sage 100** transfer process in Sage 100 Standard Link.
- Run the **Sage 100 Payroll to Sage HRMS Attendance** transfer process in Sage 100 Standard Link.
- You must log on as a user with administrative privileges to install the update.

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. Visit <http://help-hrms.na.sage.com/en-us/2017> and <http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm> for more.
- **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. Please have your Customer ID ready when contacting Support.

Payroll Tax Updates

The following federal, state, and local tax changes are included in this update.

Federal Legislative Updates

There are no federal legislative updates with this release.

Product Updates

Sage 100 Standard Link Updates (SR1)

The following new features and improvements to Sage 100 Standard Link were delivered with the Q3 SR1 release, and are included with this update:

Rounding Pay Rates

With this release, we corrected the issue where pay rates with less than 3 decimal places were rounded during the transfer between Sage HRMS and Sage 100 Payroll. The programs no longer round the pay rates and the rates are transferred consistently for both Salaried and Hourly employees. (17342)

Sage 100 Payroll Link Updates (SR2)

The following new features and improvements are included with this update:

Note: This update is also for **Sage 100 2018** and delivers the new Sage HRMS integration program, **Sage 100 Payroll Link**.

Transferring Employee Phone Numbers

We updated how employee phone numbers are transferred between programs, taking into consideration the **Type** of phone number. In Sage 100, if both of the employee's 2 telephone numbers are the same type (Home, for example) the system retrieves whichever number is set as Primary in Sage 100 then updates the employee's Sage HRMS phone number of the same type.

In the example below, only the *primary* Home number transfers to Sage HRMS and the second Home number remains in Sage 100.

S Employee Maintenance (ABC) 10/17/2017

Employee No. 11-0000005

Last Name Last Name

First Name Employee Middle Name Suffix

1. Main | 2. Additional | 3. Benefits | 4. Taxes | 5. Pay Defaults | 6. Earnings | 7. Deductions | 8. Pay History

Mailing Address

Address 9232 oak sound

ZIP Code 92392

City Dauo State FL

Country USA United States

Telephone (123)456-7890 Home Primary (098)765-4321 Home Primary

E-mail

Social Security No.

Birth Date 12/15/1974

Direct Deposit

Job Title sales

Full / Part Time Full

Seasonal Employee

Statutory Employee

Employee Status Active

Status Change	Date	Comment
Hire	6/16/2011	
Review		
Inactive		
Termination	6/16/2014	
Rehire		

Accept Cancel Delete

When you use the **Transfer > Employees** process in Sage 100 Payroll Link, Sage HRMS is updated with only the primary Home number, as shown below.

Personal | Job and Pay | Benefits | Time Off | Safety | Career | Custom

Demographics | HR Status | Termination | Leave of Absence | Events | Notes | Attachments | Contacts

Demographics - Abra Test2

Employee Last Name

SSN: , Active as of 06/16/2011, ID: 0000005

Self Service

Address and Phone | Personal | Photo

Street 1 9232 oak sound

Street 2

City Dauo

State FL Zip 92392

Country

Home (123)456-7890

Business () - Ext.

Cellular () -

Pager () -

Fax () -

E-mail

Alt. E-mail

Use International Phone Numbers No Yes

OK Cancel Apply

Transferring Benefits

With this release, we updated the benefits transfer process (Employees > Transfer) so that when benefit information is transferred from Sage HRMS to Sage 100 Payroll, the amounts are correctly calculated and updated in Sage 100 Payroll.

Sage 100 Payroll Link Updates (SR1)

The following new features and improvements to Sage 100 Standard Link were delivered with the Q3 SR1 release, and are included with this update:

Minor Updates

- We changed the name of the integration application from Sage 100 Standard Link to **Sage 100 Payroll Link**.
- We updated references to the Time Off module in Sage HRMS (formerly Attendance).
- We updated the look and feel of the integration application.

New Requirements

Because the upgraded link is built on new technology, the system has different requirements to integrate. For example, you now must enter a Sage 100 user name and password in Sage HRMS as shown below.

Review the help article [Setting Up Sage 100 Payroll Link](#) for detailed instructions to configure the new link after you upgrade.

Register Sage HRMS ? X

To register Sage HRMS, enter your Serial Number and Installation Code. If you do not have this information, contact Sage Employer Solutions Customer Service at 800-424-9392 or customerservice.employersolutions@sage.com.

Serial Number

Installation Code

You can also add the following applications to your system. These will display under Connected Services for easy access.

- Sage 100 Payroll Link [Sage 100 User Credentials](#)
- Sage 100 Premium G/L Export
- Sage 500 ERP G/L
- Sage X3 G/L
- Sage Employer Resources SKU
- Online Recruiting URL
- Online Training URL
- HR Actions Administrator URL
- HR Actions Employee URL
- Time Management URL

OK Cancel

New Fields on the Sage 100 Payroll Setup page

In Sage HRMS, the Sage 100 Payroll Setup page is used to add payroll-specific information for employees during the HR new hire process. The payroll information then transfers to Sage 100 Payroll to simplify the payroll setup process for employees.

We updated the Sage 100 Payroll Setup page fields as follows:

- Time Off Code (previously Benefit Code, now matches Sage 100)
- Time Off Eligibility Date (previously Benefit Eligibility Date)
- Medical Coverage (new)
- Medical Coverage Effective Date (new)
- Sage 100 Payroll Employee Number (now locked and cannot be manually changed)

The screenshot displays the 'Sage 100 Payroll Setup - Abra Test 2' page for employee Mary Smith. The page is divided into several sections:

- Navigation:** Personal, Job and Pay (selected), Benefits, Time Off, Safety, Career, Custom.
- Current Payroll Setup:** Current Pay, Current Job, Job History, Sage 100 Payroll Setup.
- Employee Information:** Mary Smith, SSN: 392-28-5302, Active as of 02/28/2015, ID: 3. Includes a 'Self Service' link and navigation arrows.
- Payroll Status:**
 - Sage 100 Payroll Employee Number: 0000007
 - Pay Cycle: Weekly
 - Autopay Employee: Yes No
 - Pay Method: Hourly
 - Direct Deposit: Yes No
 - Hourly Pay Rate: 37.95962
 - Overtime Exempt: Yes No
 - Time Off Code: [Dropdown menu]
 - Pension / Profit Sharing: Yes No
 - Time Off Eligibility Date: / /
 - Seasonal: Yes No
 - Medical Coverage:
 - Medical Coverage Effective Date: / /

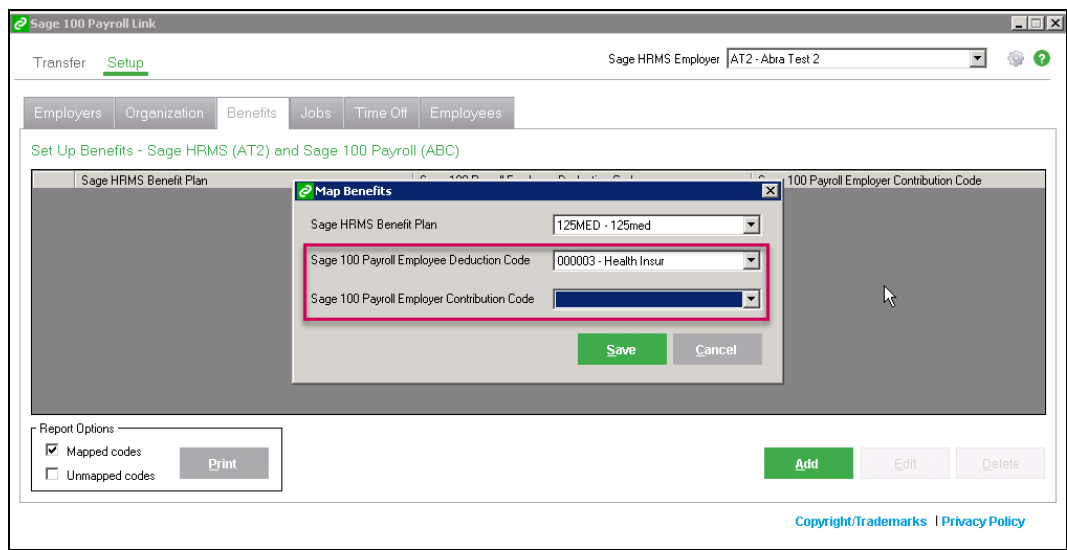
We added the following new fields to the employee transfer processes:

- Middle Name
- Rehire Date
- Second Emergency Contact
- Emergency Contact Relation
- Second Phone Number
- Primary Phone Indicator


- Phone Number Type
- Active Duty Discharge Date
- Protected Veteran

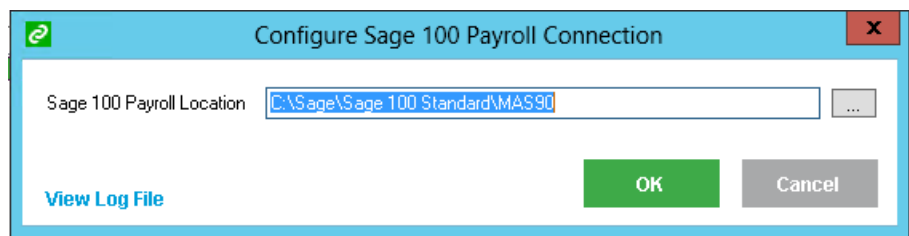
Other general field changes include:

- We expanded the Time Off Code field length to 6 characters (previously 2).
- You can now map an HR benefit to an employer-only deduction code in Payroll. And the employee-only portion of the deduction code no longer requires mapping.



Easy Access to the Log File

With this upgrade, we provide an easy way to access the new log file, which helps you identify errors and the source of transfer problems. To access the error log file, in the upper-right corner of Sage 100 Payroll Link, click  (settings icon). The **Configure Sage 100 Payroll Connection** window opens. Next, click **View Log File** to open the file in your default text editor (such as Notepad).



Note: The error Log File appears on the **Configure Sage 100 Payroll Connection** window only after using the transfer process.

Updates to Processes

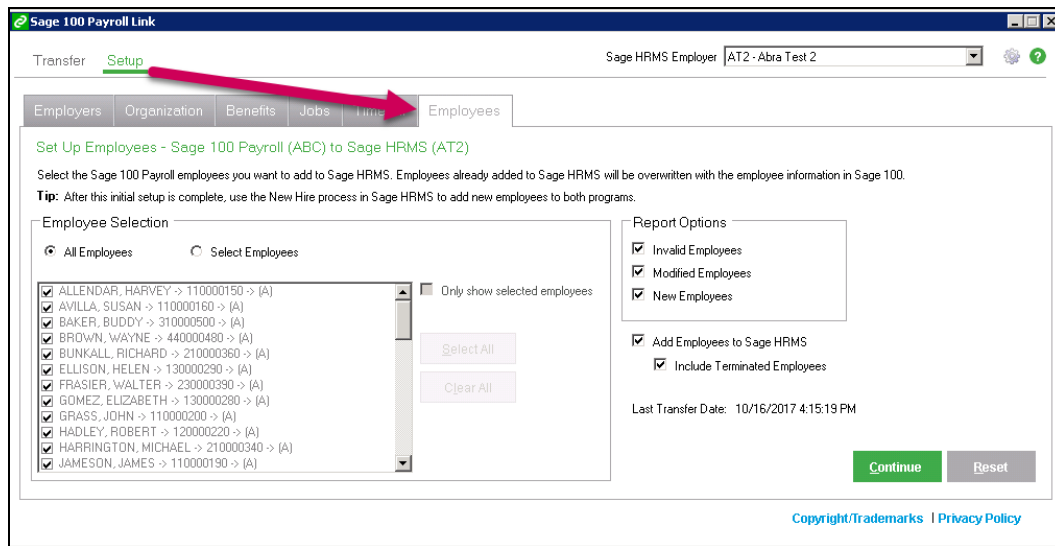
We updated a few of the processes to simplify your experience.

Sage 100 Payroll Location

- We renamed it to **Configure Sage 100 Payroll Connection**
- In Sage 100 Payroll Link, click  (settings icon) to open the window.

Transfer Employees from Sage 100 to Sage HRMS

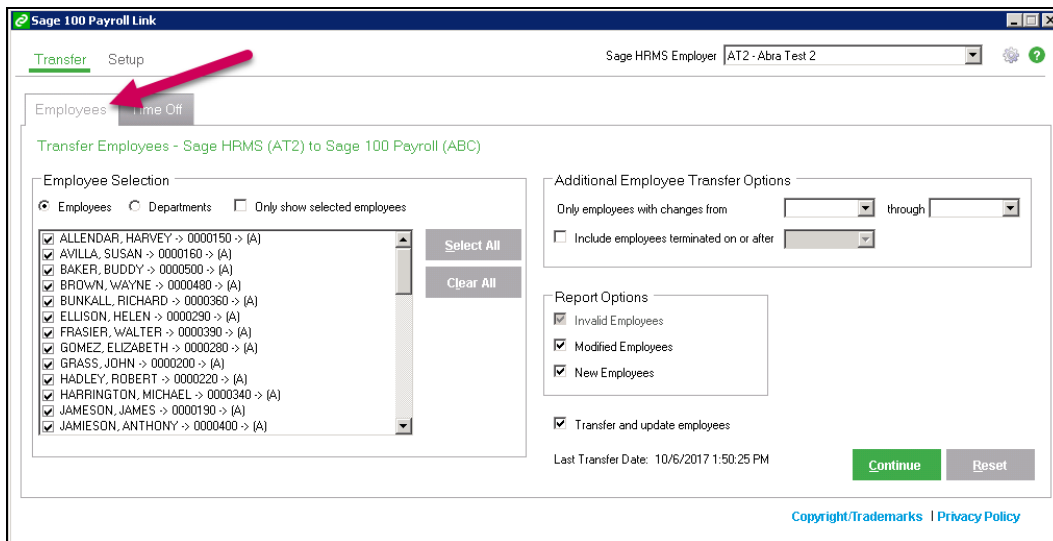
- We renamed this process to **Set Up Employees**.
- It's now available under the **Setup** tab.
- The process no longer prompts you to confirm you want to transfer. If you select the **Add Employees to Sage HRMS** option, the process initiates when you click **Continue**.



The screenshot shows the 'Sage 100 Payroll Link' interface. The 'Setup' tab is active, and a red arrow points to the 'Employees' sub-tab. The main heading is 'Set Up Employees - Sage 100 Payroll (ABC) to Sage HRMS (AT2)'. Below this, there is a tip: 'Select the Sage 100 Payroll employees you want to add to Sage HRMS. Employees already added to Sage HRMS will be overwritten with the employee information in Sage 100. Tip: After this initial setup is complete, use the New Hire process in Sage HRMS to add new employees to both programs.' The 'Employee Selection' section has two radio buttons: 'All Employees' (selected) and 'Select Employees'. A list of employees is shown with checkboxes, including names like ALLENDAR, HARVEY and AVILLA, SUSAN. There are 'Select All' and 'Clear All' buttons. The 'Report Options' section has checkboxes for 'Invalid Employees', 'Modified Employees', 'New Employees', 'Add Employees to Sage HRMS', and 'Include Terminated Employees'. The 'Last Transfer Date' is 10/16/2017 4:15:19 PM. At the bottom right, there are 'Continue' and 'Reset' buttons. A copyright notice is at the bottom center.

Transfer Employees from Sage HRMS to Sage 100

- We renamed this process to **Transfer Employees**.
- It's now available under the **Transfer** tab.
- The process no longer prompts you to confirm you want to transfer. If you select the **Transfer and update employees** option, the process initiates when you click **Continue**.



Federal, State, and Local Taxes

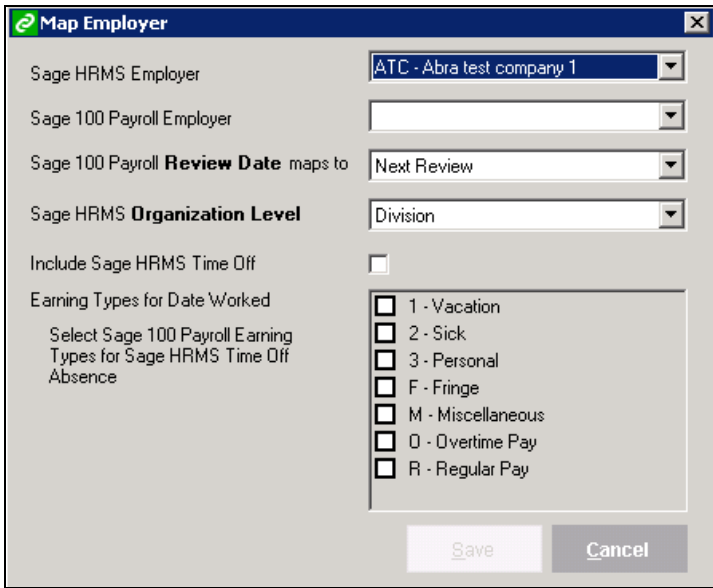
- We removed these settings from Sage HRMS.
- With the Sage 100 2018 release, you now have access to robust tax profiles in Payroll.
- The payroll tax set up for new employees must be completed in Sage 100 Payroll after the employee is transferred from Sage HRMS.

Time Off Benefit Date

- In Sage 100 Payroll, the Benefit Date field is now named **Date Worked**.

Employer Mapping: Last Hire Date and Original Hire Date

- We removed these fields from the **Set Up Employer** window.
- The Last Hire Date and Original Hire Date fields are now automatically mapped with employee information. [Learn more about automatically-mapped fields.](#)

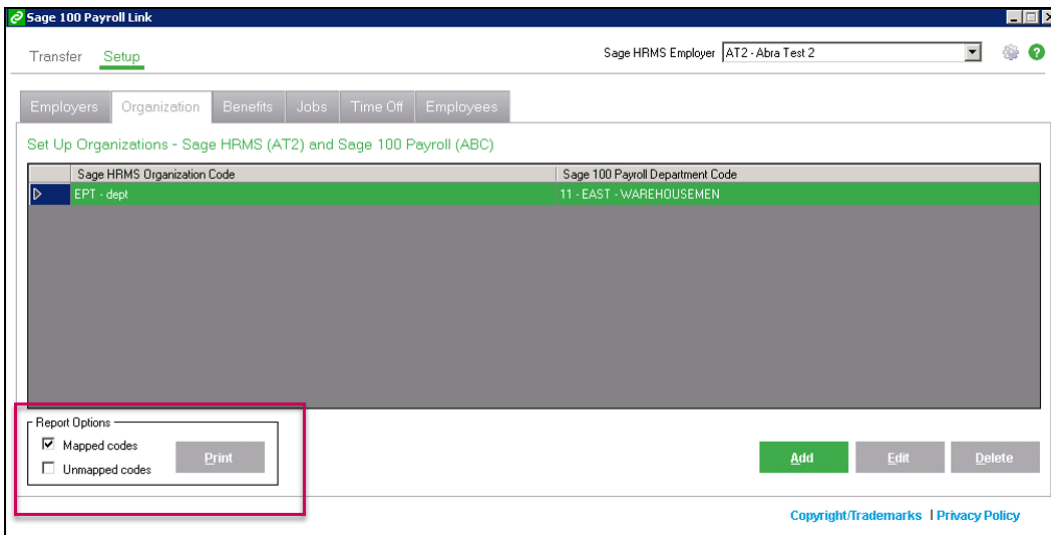


Refresh Sage HRMS Code Tables

- We removed this process.
- The system now automatically refreshes code tables using the new technology.

Reports

- Now available on each window in Sage 100 Payroll Link.
- Each window in the program has a **Report Options** section.



Upgrade Instructions for Sage 100 Payroll Link

You need the following to install the new Sage 100 Payroll Link (upgrade):

- The **Q3 2017 SR2 Product Update download**. The download is available on the Sage Knowledgebase at <https://support.na.sage.com> under Article ID **86934**.
- Sage 100 2018 and Sage HRMS 2017 must be installed and set up.

Tip: Refer to the [Sage 100 Documentation](#) and [Sage HRMS Documentation](#) websites for instructions to set up and use each program.

Program Compatibility

Sage 100 Payroll and Sage HRMS can be integrated to transfer employee records, employee information, and time off absence transactions between the two programs. Below is a list of software versions and compatibility.

Sage 100 Version	Sage HRMS Version	Application for Integration
Sage 100 2018	Sage HRMS 2017	Sage 100 Payroll Link
Sage 100 2017 or older	Sage HRMS 2017 or older	Sage 100 Standard Link
Sage 100 2018	Sage HRMS 2016 or older	Not Compatible

Note: When you enter the Serial Number and Installation Code in **Sage HRMS > Register Sage HRMS**, the system automatically detects your currently installed version of Sage 100 and installs the appropriate link.

Configuring the New Link

Since you are upgrading from Sage 100 Standard Link to the new Sage 100 Payroll Link, before you can use the new link, you must:

1. Configure user roles in Sage 100
2. Enter user credentials in Sage HRMS
3. Set Group Security in Sage HRMS
4. Configure Sage 100 Payroll Link to point to your Sage 100 2018 database.

Important! Review the help topic, [Setting Up Sage 100 Payroll Link](#), for detailed instructions for each of these steps.

Review Code Mapping

During the upgrade process, your previous settings from the former Sage 100 Standard Link are transferred to the new Sage 100 Payroll Link. However, the new link requires that at least one Organization Code and Department must be mapped. Additionally, some of the automatically mapped fields and information has changed. And finally, we added a few new fields.

We strongly recommend that you use the **Report Options** to review the mapped and unmapped codes on each window in Sage 100 Payroll Link. Then, review the **Sage 100 Payroll Setup** window in Sage HRMS for each employee. By reviewing this information and making necessary updates, you can prevent transfer errors when you're ready to use the program.

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**.
3. Under Sage HRMS, click your product and version.
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. Right-click on the Sage HRMS Client program and select **Run as administrator** to initiate the file update process.
2. Click **OK** to proceed and update your files.

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.

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.