Sage HRMS

July 1, 2022 Release Notes

June 2022

Contents

Product update release notes

> **Important!** All customers who update, maintain, and use Sage HRMS or Sage HRMS Employee Self Service should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Product update information

Product: Sage HRMS and Sage HRMS Employee Self Service

Version: Product Update July 1, 2022

About product updates for Sage HRMS

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

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 the Sage HRMS Product Documents website for access to more documents.

- **Sage City:** Visit https://sagecity.na.sage.com for blogs, tips, and guidance specific to Sage HRMS.

- **Customer Support:** For support resources, visit the Sage City Customer Resources page, select your country, and then select your product.

Canadian Payroll Tax Updates

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

You may need to adjust your employee records to reflect these tax changes.

Provincial and Territorial Legislative Updates

This section lists provincial and territorial legislative updates available with this release. If a province and territory is not listed in this section, there are currently no tax updates or product modifications for that province and territory. For details about each update, review the CRA July 1, 2022 government publication or visit the CRA website.

New Brunswick

The basic personal amount for 2022 has changed. For the remaining six months of the year, use a prorated basic personal amount of $12,623.

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.

Non-binary Gender

"Non-binary" is now a valid option for Gender on the Other Tab of the Employee Payroll page. To update the Gender on the Employee Payroll page to "Non-binary", select "Non-binary" in the Gender Identity drop-down on the Personal Tab of the Employee Demographics page. Any other value in the Gender Identity drop-down will update the Employee Payroll Gender field to the value from Gender on the Employee Demographics page.

Reviewing Comments for Employees

If you print the Employee Information report with only comments included, the report lists only employees with comments.

Sage HRMS product updates

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

Leave of Absence Attachments

The label - "Display Comments in Employee Self Service" on the Attachment tab of the Leave of Absence page in Sage HRMS, has been changed to "Display in Employee Self Service" to represent the functionality more accurately. When this check box has been selected, the corresponding Attachment will be available to view on the Employee Leave of Absence page in Sage HRMS Employee Self Service.

Gender Identity drop-down options

The following additional Gender Identity options are available on the Personal tab of the Employee Demographic page in HRMS:

- Non-binary
- Prefer Not To Identify

- Other

Organization Report

The Organization Report in Sage HRMS will now display in a Landscape view and display all of the columns in the report.

Change Pay function

Adding a Reason Code 'on the fly' during the 'Change Pay' function is now saving the new Reason Code in Sage HRMS. The new Reason Code is then applied to the 'Change Pay' record.

HRMS Attendance Plan linked to Compensatory Time Payroll Accrual Codes

Fixed an issue where an error would occur during Calculate Payroll when an Attendance Plan was linked to a Payroll Accrual code that has a type of "Compensatory Time." Since this is an invalid setup for Payroll, we no longer show these Payroll Accrual Codes in the Payroll Accrual drop-down on the Attendance Plans Detail page.

Additional features for the premium version of Sage HRMS

Employee Benefit pages

The Employee Insurance Benefits and Savings Benefits screens now display the Description column in the grid in Sage HRMS.

Employee's Preferred Name

If an employee has a Preferred Name, it will be appended inside of parenthesis in the Employee name banner for all Employee Detail pages as well as the Trainee Detail pages in Sage HRMS.

Sage HRMS Employee Self Service product updates

The following fixes are included with this update to Sage HRMS Employee Self Service.

Email functionality paired with Microsoft Office 365

Fixed an issue where System-generated email messages were failing when using the mail relay feature in Sage HRMS Employee Self Servicein conjunction with Office 365.

Waive Date on Existing Benefit Plan

Fixed an issue when an employee is unable to enroll in a benefit plan during Open Enrollment due to the Waive Date on the benefit from an earlier enrollment period. The Waive date will be removed after a successful enrollment of the new benefit plan. This change also impacts benefit enrollments during a Life Event.

Life Event Setup

Fixed an issue where the page controls displayed incorrectly using the arrows to navigate between pages while creating a new Life Event in the existing version of Sage HRMS Employee Self Service.

Additional features for the premium version of Sage HRMS Employee Self Service

Two Factor Authentication

Two Factor Authentication has been enhanced to offer Sage HRMS Employee Self Service users the option of emailing a Code when logging into Sage HRMS Employee Self Service. This method is setup on the Logon Setup page under the Logon Properties section. Employers may still opt to require Security Questions instead as the Logon Authentication Method.

Add Attachments to Employee records

Employees can now add Attachments in Employee Self Service to the pages listed below. The access level required to add Attachments is controlled by the main Employee page. For example, if the Education page is set to "Update," the Attachment page and all Attachment records will also respect this setting.

- Skills
- Education
- Wellness
- Events
- Previous Employer
- Attachments

In addition, the Employee's Leave of Absence page provides "View" only access to Attachments that are set to "Display in Employee Self Service."

Managers can also view the Attachments added by Employees in Sage HRMS Employee Self Service.

Logon Setup User License Number

The User Licenses information on the Logon Setup page will now display "Unlimited" for both Purchased and Available when HRMS is registered with unlimited users.

Summary Grids show more info

Summary grids on several pages in Sage HRMS Employee Self Service have been improved and now display additional fields. This enhancement has increased the information available to Employees, Managers and Administrators.

Logon Maintenance

The HR Administrator as well as the Master user will now be able to see the employee's Username and Status on the Logon Maintenance summary grid.

Employee's Preferred Name

Several pages in Sage HRMS Employee Self Service will also append the preferred name inside of parenthesis when the Employee name is also displayed. The preferred name field is available to update on the Employee's Personal Profile page.

Notes page

The Notes "Type" field is no longer marked as required on the Employee Notes page in Sage HRMS Employee Self Service. On the Manager's Notes page for their direct reports, the "Comments" field has been relabeled as "Notes" to better represent the information being provided.

Manager Menu Options

Customers that do not have the Training Module in Sage HRMS, now have access to the Manager menu in Sage HRMS Employee Self Service.

Benefit Plan in Required group

Fixed an issue where the benefit plan assigned to a Required Group was not being displayed during Open Enrollment. If an employee tries to enroll in a Benefit plan through Open Enrollment, the benefit plan in the Required Group is now also available to elect.

Sage HRMS Employee Self Service Mobile Updates

Pay History

Fixed an issue where the Employer Paid Portion of a Benefit was not displayed correctly in Pay History. The Employer Paid Portion of Benefits will now display correctly when the Employee's Pay History is available as a pdf in the mobile version.

Additional features for the premium version of Sage HRMS Employee Self Service Mobile

Additional Authentication

When the Login Authentication method in is configured for Additional Authentication, users will be required to confirm their identity by requesting a one time use code. This code will be sent to their email address on file. These codes will expire within a predetermined period of time.

New Employee Mobile pages

The Employee menu has been expanded to provide access to the following two new pages:

- Previous Employer
- Attachments

Sage HRMS 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 Support Resources** page at https://www.sagecity.com/global-resources.
2. Select your **Country or Region** from the drop-down list.
3. Select **Sage HRMS** from the **Products** drop-down list.
4. In the **Knowledgebase** tile, click the **Search Sage Knowledgebase** link.
5. Click **Log in**, and then log into the site.
6. In the **Latest update** section, click an update to download.
7. In the article, click **Download** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Installing the product update

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

To install the product update:

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.

> **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. After the InstallShield 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.

   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 matches 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: July 1, 2022.

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 HRMS Employee Self Service update installation instructions

> **Note:** Some features in this release of Sage HRMS Employee Self Service are only for the premium version of Sage HRMS. If you are not on the premium version of Sage HRMS and would like to learn about options for moving to the premium version, please contact your Sage Business Partner or Sage Account Manager.

After you have downloaded the Sage HRMS Employee Self Service update from the Sage Knowledgebase, follow these instructions to install the update.

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 HRMS 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 HRMS 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 Support Resources** page at https://www.sagecity.com/global-resources.

2. Select your **Country or Region** from the drop-down list.

3. Select **Sage HRMS** from the **Products** drop-down list.

4. In the **Knowledgebase** tile, click the **Search Sage Knowledgebase** link.

5. Click **Log in**, and then log into the site.

6. In the **Latest update** section, click an update to download.

7. In the article, click **Download** 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 HRMS 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 we recommend that you copy or save a screen shot 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 HRMS Employee Self Service update

1. Using your external backup procedures, back up the Sage HRMS and Sage HRMS Employee Self Service databases to a media device that is external to your product servers:

   a. Log on to the Sage HRMS Employee Self Service server and select **Programs** > **Employee Self Service** > **System Maintenance** to open the Sage HRMS 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 HRMS 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**).

   > **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. The installation program detects that a previous version of Sage HRMS 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 HRMS 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 HRMS Employee Self Service as the MASTER user to complete the process.

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