Sage HRMS Employee Self Service

Modernization Release for Subscription

October 2021

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Sage HRMS Employee Self Service Release Notes

Modernization release for the subscription version

October 28, 2021

Note: This modernization release of Sage HRMS Employee Self Service is only for customers on the subscription version of Sage HRMS. If you are not on subscription, please contact either your Sage Business Partner or Sage Account Manager for information on your options for moving to subscription.

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:** Many answers to common questions can be found in the help included with Sage HRMS Employee Self Service. From within the product, click (the Help icon) in the right corner of the title bar, and then select **Help** to open the online help system. You can then use the table of contents (in the left pane) or use the **Search** feature (at the top of the page) to view additional help topics.

  Tip: To see the help topic describing the current page, click (the Instructions icon) to open the **Instructions** pane, and then click (the Help icon) in the right corner of that pane.

- **Documentation:** Visit the Sage HRMS Product Documents website for access to related documents.
- **Customer Support:** For support resources, visit the Sage City Customer Resources page, select your country, and then select your product.

Your feedback

Sage appreciates your comments about this new release and your suggestions for further enhancements. Please visit Sage City Ideas to post your feedback.

Modernization features in this release

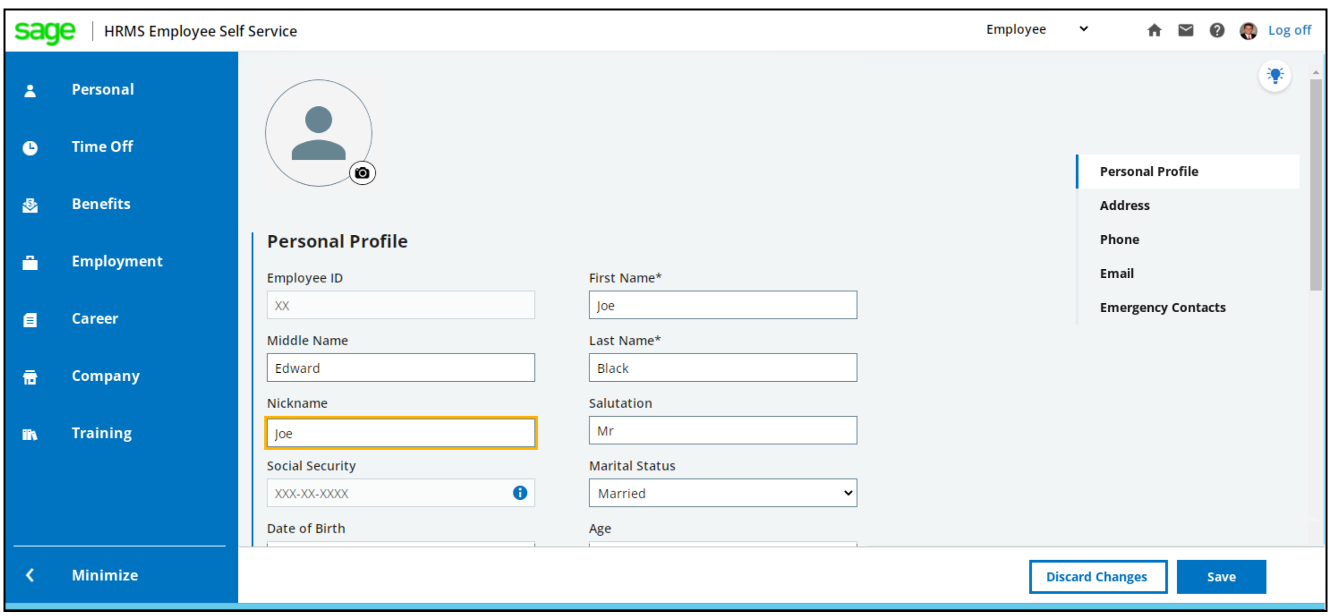
The following features are now included in Sage HRMS Employee Self Service.

Modern and improved user interface

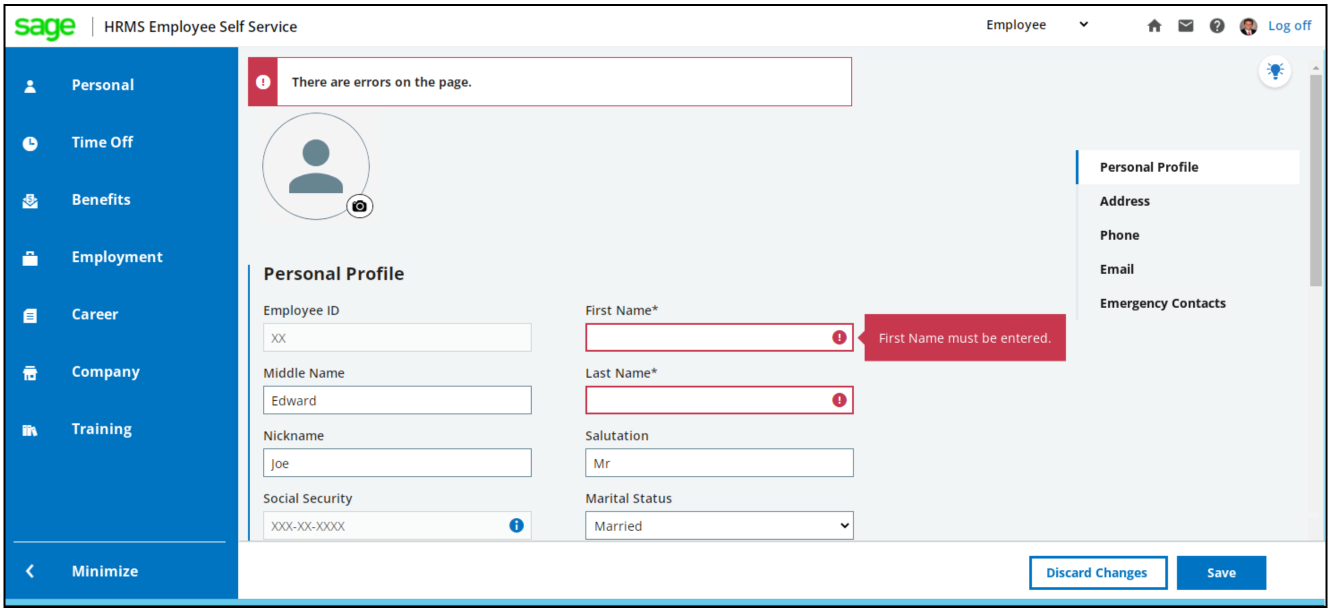
The interface for Sage HRMS Employee Self Service was completely redesigned to improve usability and provide consistency with other modern Sage products.

Although the menus are still on the left side of the page, they can be minimized to provide more space for information on the page, especially for tables. The **Instructions** pane on the right side of the page is initially hidden but can be displayed by clicking (the Instructions icon).

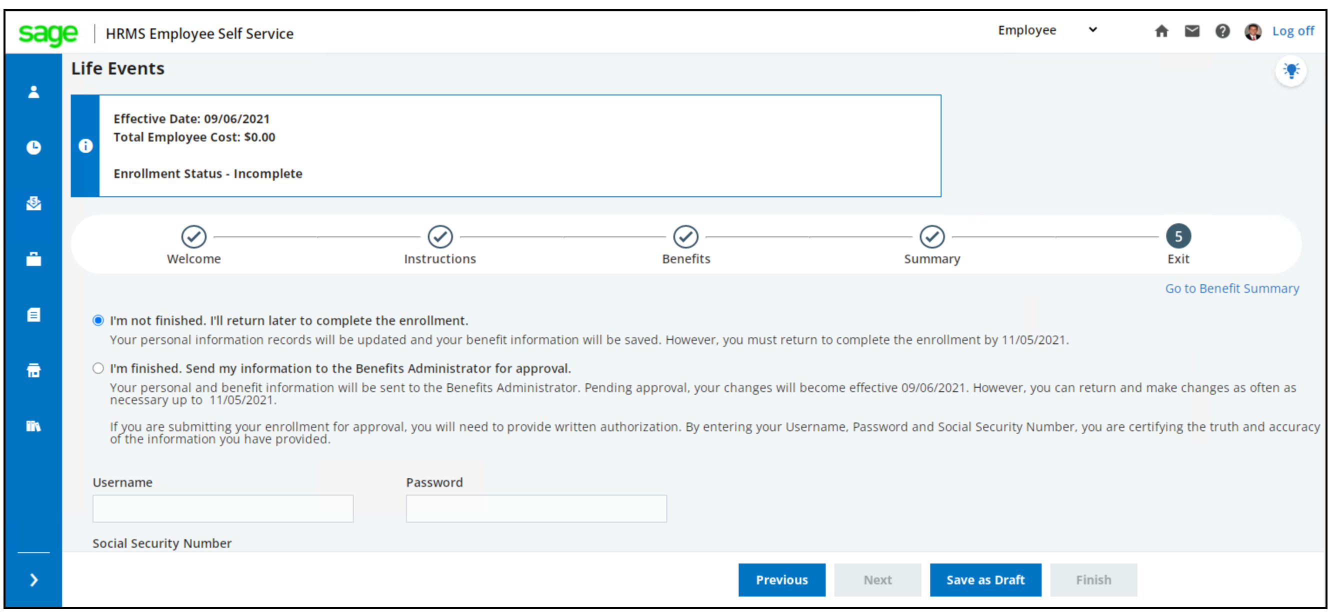
On pages where the employee is allowed to edit their information, the item they are editing is highlighted with a gold border. When they make a change, the **Save** and **Discard Changes** buttons are enabled at the bottom of the page, as shown in the following screen shot.



If the employee clicks **Save** and there are errors, a message displays at the top of the page. The items with errors are identified with a red border. The hover message by the item with the error describes the issue, as shown in the following screen shot.

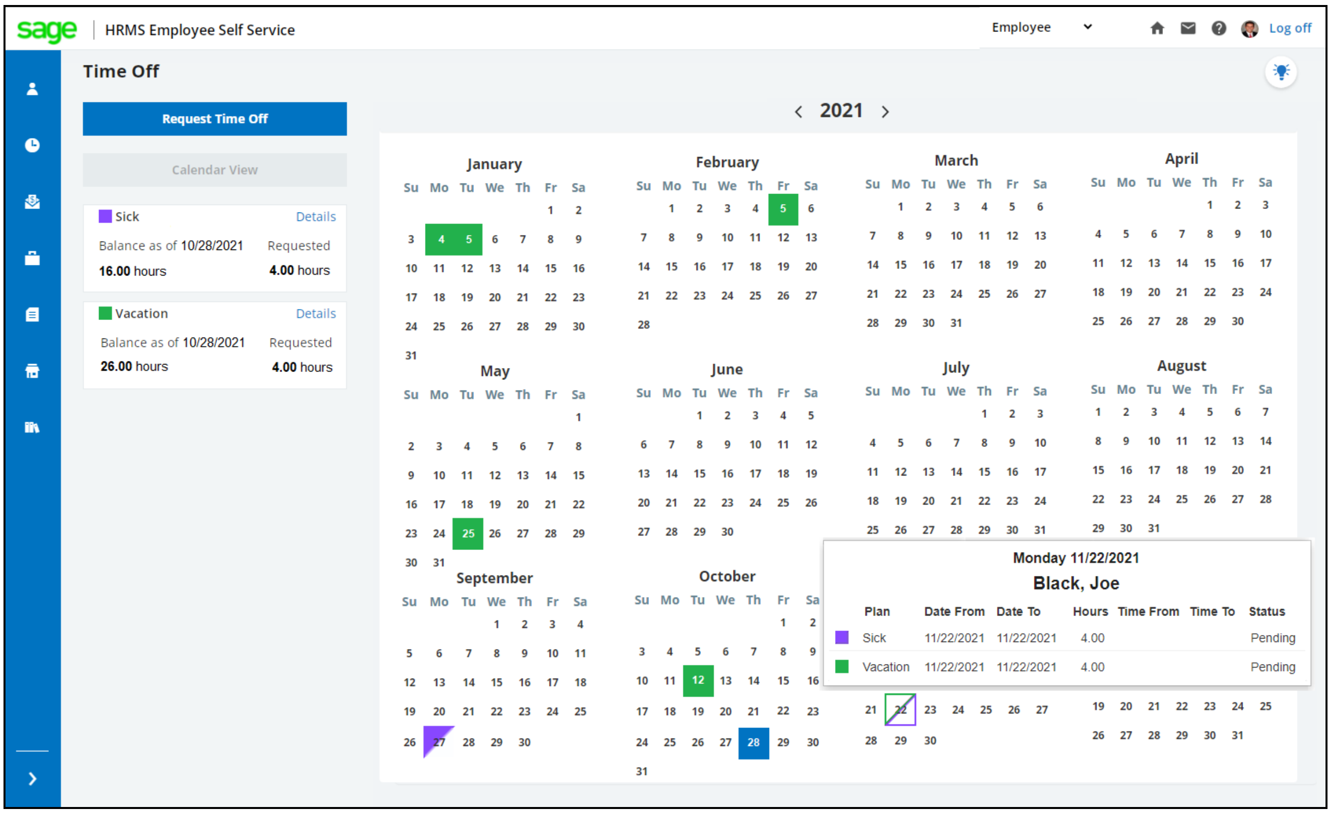


For processes that involve many steps (such as Open Enrollment and Life Events), the pages now include a visual representation of the steps in the process in a bar near the top of the pages. Completed steps include a check mark. On the final page, the button labels were changed so employees can clearly see that they can save their entries as a draft or finish and submit their information for approval, as shown in the following screen shot.



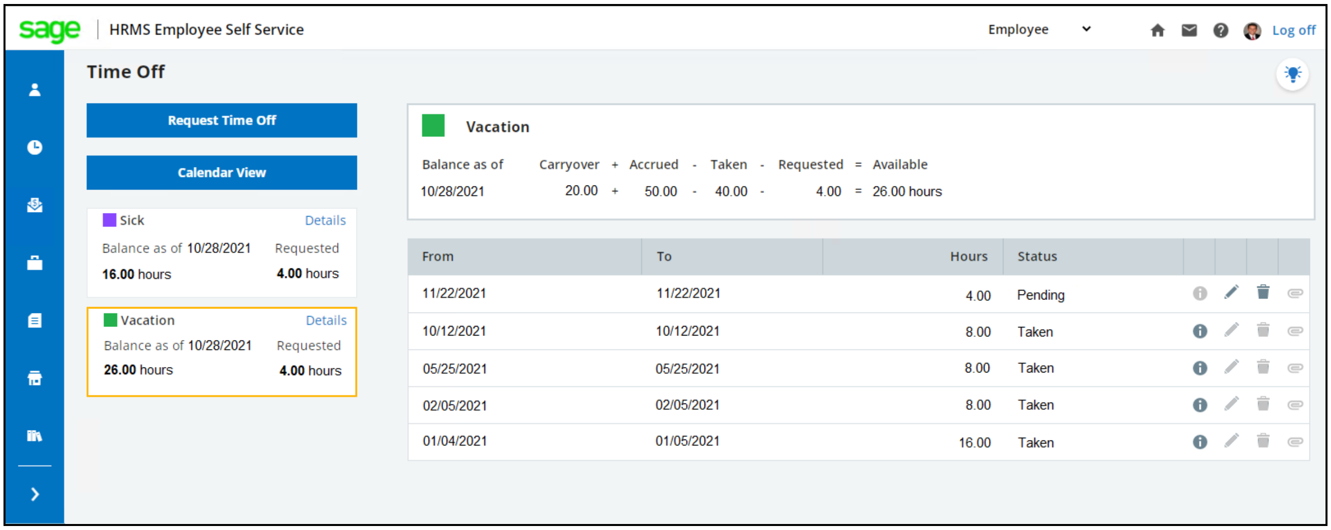
Improved employee experience when making and managing time off requests

When the employee opens their **Time Off** page, they now see a calendar displaying their time off requests for the current year. This provides a visual representation of their requests for the year. The colors used in the calendar and tile correspond to the colors assigned to the plans by the administrator (on the **Time Off Setup** page). The employee can hover their mouse over a day with a request to see the time off details for that day, as shown in the following screen shot.



To request a day off, they can either click the day on the calendar or click the **Request Time Off** button.

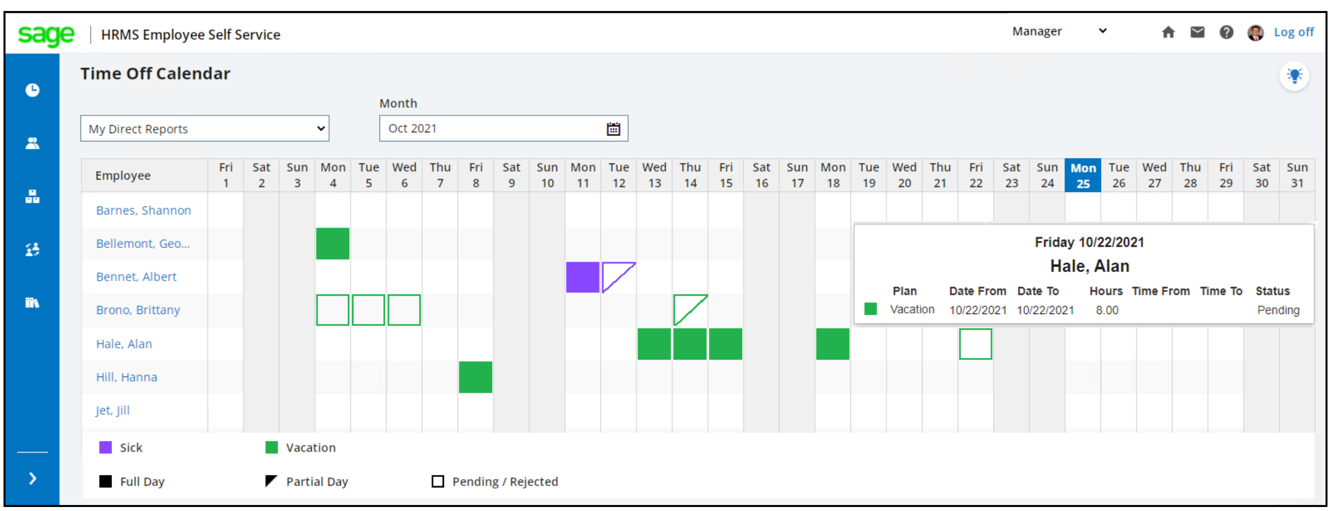
The left side of the page contains tiles with the balances of the various time off plans. To see how the balance was calculated for a plan and a table of time off requests, they can click the **Details** link in the tile to open that plan's **Time Off** details page, as shown in the following screen shot.



To see the details for another plan, they just need to click the tile for the other plan. In the table of time off requests, the employee can make changes to pending requests by clicking (the Edit icon) or delete the pending request by clicking (the Delete icon). The employee can view more information about an approved or taken request by clicking (the View icon).

Improved manager experience for viewing time off requests

The manager can now see the time off requests from their direct reports in a monthly calendar view. The manager can easily see the days when multiple employees will be taking time off. The colors used in the calendar correspond to the colors assigned to the plans by the administrator (on the **Time Off Setup** page) and are shown in the legend at the bottom of the page. The manager can hover their mouse over a day with a request to see the employee's time off details for that day, as shown in the following screen shot.



The manager can see more details about an employee's time off balances and requests by clicking the employee's name in the left column. If one of these employee's has other employees reporting to them, the icon displays to the left of that employee's name. The manager can click that icon to view the time off requests for those employees (their indirect reports).

Additional pages, information, and features

This release includes five new pages and over 75 new fields.

Improvements for employees

Sage HRMS Employee Self Service enables employees to view much of their information that is stored in Sage HRMS. In some cases, the employee can make changes within Employee Self Service, reducing paperwork and HR requests. In this release, employees can view additional information on the following pages:

- Consolidated **Personal Profile** page with additional fields and a new **Email** section (as well as home address, phone numbers, and emergency contacts sections)
- New **Notes** page (showing notes added in Sage HRMS and set to display to the employee)
- Additional field on the **Events** page
- Improved layout of the **Current Benefits** page
- Additional fields on the **Wellness** page (formerly called the Medical page)
- Additional fields on the **Job** page, including a table with secondary job information (if applicable) and a table of job history
- Additional fields on the **Compensation** page
- New **Length of Service** page
- Additional fields on the **Performance Review** page and a table of review history
- Additional field on the **Attachments** page
- Additional field on the **Skills** page
- New **Previous Employer** page

Improvements for managers

Sage HRMS Employee Self Service enables managers to view specific information about their direct reports. In this release, managers can view additional information on the following new pages:

- New **Previous Employer** page
- New **Notes** page

In addition, the manager can view the new fields on their direct reports' pages.

Improvements for the system administrator

The **Time Off Setup** page now lets the system administrator specify the color used for the time off plans and the order that they appear on the employee and manager **Time Off** pages.

Important! The new pages added for employees and managers are initially set to not display. The system administrator can change this by changing the access settings on the **Page Setup** tab of the **Employer Setup** page.

Notes for the system administrator

With this release, please note:

- The new modern interface has not yet been applied to the System Administrator pages.
- You can no longer use custom stylesheets. Any custom stylesheets currently used within the system are ignored.
- If you select another stylesheet on the **Customize Logon** page, it has no effect on the look of the **Logon** page.
- If you select a stylesheet or logo on the **Customize Employer** page, it has no effect on the look of other pages.

Sage HRMS Employee Self Service update installation instructions

Note: This modernization release of Sage HRMS Employee Self Service is only for customers on the subscription version of Sage HRMS. If you are not on subscription, please contact either your Sage Business Partner or Sage Account Manager for information on your options for moving to subscription.

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 **Solve** tile, click the **Search Sage Knowledgebase** link.
5. Click **Sign In**, and then sign into the site.
6. In the Support by product section, click **Select your product**, and then click **more products**.
7. Under Sage HRMS, click your product and version.
8. In the **Latest updates** section, click an update to download.
9. 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 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.