



Sage HRMS

Q3 2024 Release Notes

September 2024

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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 Q3 2024

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.

Important! With every release, we test 2 versions back of Sage HRMS. For this release, you should be on Q1 2024 or later to upgrade to Q3.

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.
- **Community Hub:** Visit <https://communityhub.sage.com/us> for blogs, tips, and guidance specific to Sage HRMS.
- **Customer Support:** For support resources, visit the [Sage Support Resource Centre](#) page.

U.S. Payroll Tax Updates

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

State and Local Legislative Updates

This section lists state and local legislative updates available with this release. If a state or locality is not listed in this section, there are currently no tax updates or product modifications for that state or locality.

Note: Sage HRMS U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.

If you use custom tax codes to capture SDI taxes, note the following:

- If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
- If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.
- Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.

Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Arkansas

Effective July 1st, 2024, Arkansas withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

District of Columbia

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
DC0001	District of Columbia Paid Family Leave Tax	0.75%	07/01/2024

Kansas

Effective July 1st, 2024, Kansas withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Kentucky

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0091	Winchester CT Regular IT	2.15%	10/01/2024
KY0181	Flemingsburg CT Regular IT	1.5%	07/01/2024
KY0207	Bourbon CO Regular IT	1.25%	07/01/2024
KY0256	Grant CO Regular IT	2.5%	07/01/2024
KY0286	Hurstbourne Acres CT Regular IT	1%	07/01/2024

Ohio

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OH0428	Indian Hill VI Regular IT	0.45%	01/01/2024
OH0893	Mercy West JEDD III CT Regular IT	1%	10/01/2024

Pennsylvania

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
PA0482	Penn TP, Huntingdon SD (NR) LST	\$10	06/15/2024
PA0491	Lincoln TP, Huntingdon SD (NR) LST	\$10	06/15/2024

Utah

Effective June 1st, 2024, Utah withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Vermont

Vermont Child Care Contribution (CCC) is now supported on W-2.

- If an employer chooses to deduct and withhold a portion of the Child Care Contribution from an employee, the employer should report the portion of CCC withheld from the employee for the tax year on Box 14 of the employee's W-2.
- For more information, see Sage Knowledgebase article: [240606174850653](#).

Product updates

The following product updates are included with this release.

Payroll product updates

US Payroll Product Updates

Fix for Aatrix error

We have fixed the Aatrix error that appeared when updating government forms.

Fix for display of invalid G/L Accounts

We have fixed Payroll Processing Exceptions where invalid G/L Accounts were not displayed correctly.

Tax Calculation Analysis Reports

There are two new summary Tax Calculation Analysis reports:

- Calendar Year Totals Summary
- Date Range Summary

To print these reports, go to, **Payroll Transaction Reports > Tax Calculation Analysis > Report Style** dropdown with new reports.

Use longer numbers for checks

You can now enter Payroll check numbers that are up to fifteen characters long.

Canadian Payroll Product Updates

Fix for display of invalid G/L Accounts

We have fixed Payroll Processing Exceptions where invalid G/L Accounts were not displayed correctly.

Tax Calculation Analysis Reports

There are two new summary Tax Calculation Analysis reports:

- Calendar Year Totals Summary
- Date Range Summary

To print these reports, go to, **Payroll Transaction Reports > Tax Calculation Analysis > Report Style** dropdown with new reports.

Use longer numbers for checks

You can now enter Payroll check numbers that are up to fifteen characters long.

Premium version of Sage HRMS product updates

Premium product updates include new features and enhancements for both the desktop version and the web version of Sage HRMS. If you have also purchased Sage HRMS Employee Self Service, updates for the premium version of ESS will also be included. Please review the table below to learn more about these changes.

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
HR Setup and Attendance Setup pages added to the web version of Sage HRMS Learn more		Yes	
Code Tables added to the web version of Sage HRMS Learn more		Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Gender Identity Code Table added to HR Code Tables Learn more	Yes	Yes	
My Links are now available from Home page Learn more		Yes	
New feature - Manage Logs added to the web the web version of Sage HRMS Learn more		Yes	
New feature - Import Pay History Learn more		Yes	Yes
Give Terminated Employees Temporary ESS Access Learn more			Yes
Logon Maintenance page Enhancement Learn more			Yes
Upgrade desktop version of Sage HRMS Payroll to Sage 300 2025 Learn more	Yes		
Aatrix installer updated in Q3 Learn more	Yes		
Check Field Number Expansion to 15 Digits Learn more	Yes		
Vets 4212 Form updated for 2024 Learn more	Yes		
Crystal Reports does not display in Connected Services Issue Resolved	Yes		

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Learn more			

HR Setup and Attendance Setup pages

The HR Setup page enables HR Administrators to configure HR information and define employment settings for both US and Canadian companies within the web version of Sage HRMS. With the addition of the Attendance Setup page in the web version, HR Administrators can now specify attendance setup information. These settings include general plan information, such as the units used to track absences and the number of decimal places for accrual hours.

Code Tables added to the web version

The following Code Tables have been added to the web version of HRMS in this release:

Employees

Benefits

- Dependent Relationship Codes
- Savings Plan Group
- Types Codes

Code Tables

- FMLA Event Reason
- Gender Identity
- State/Province
- User-Defined

Jobs

- Job Codes

- Pay Equity Job Group Codes Direct/Indirect Codes
- Status Codes

Time Off

- Attendance Plans
- Absence Reason Codes

Gender Identity Code Table

We have added a new Gender Identity code table to the web version (and desktop version) of Sage HRMS. The codes shipped with this product update Gender Identity code table include the current list of codes available in the Gender Identity dropdown displayed on the Personal > Demographic page. All codes will be initially available at the Enterprise level.

The Gender Identity code table respects the existing “code table” functionality with the exceptions noted below:

1. Default code values:

- Female
- Male
- Non-binary

2. The first time a new Gender Identity code is added on the Employer level, the user is presented with a message indicating that employees will now use code values from the Employer level.
3. If any code is copied from the Enterprise level to the Employer level (code table), or from one Employer to another Employer, the default code values above are automatically copied to the new code table.
4. The three default code values cannot be modified or individually deleted as they are used in Compliance reports.
5. Only Gender Identity codes that are not one of the three default code values can be deleted at the Enterprise or Employer code table level.
6. All Gender Identity codes can be deleted by clicking the new ‘Delete All Codes’ button at an Employer level only.

Note: New Code Tables added in Sage HRMS are initially set to Allow Access = No in Group Security. This setting must be changed to 'Yes' or the Gender Identity code table will not be available in either the desktop or the web version of Sage HRMS.

My Links are now available from Home page

We have added the My Links feature to the My Shortcuts panel on the Home page of the web version. Users can edit, delete or add new links by selecting the link - Manage My Links from the My Shortcuts panel. These changes will be reflected in both the desktop and web versions. In addition, links can be added to the Connected Services menu in both versions of Sage HRMS as well.

New feature - Manage Logs added to the web version of Sage HRMS

With the ability to schedule processes from the web version, we recognized the need to be able to delete process log files that are being created and stored on the web server. A new page is now available under the Process Management menu to delete these logs. Users can also access the Manage Logs page directly from the Process Management page by clicking the Manage Logs button next to the Refresh button.

To filter the list of processes, the Manage Logs UI allows the user to search by Process Name, Status and a specified date range.

To delete the log files, select the checkbox corresponding to the record you want to delete or select the checkbox in the table header to select all of the rows in the table and then click the Delete Logs button.

Important! The Delete process will permanently remove the selected log file(s) from the CustomFiles folder on the ESS server. This process cannot be undone. Successfully imported pay history records are not affected.

New feature - Import Pay History

Customers with the premium version of Sage ESS will now be able to Import Pay History using a CSV file. The Import Pay History process allows you to import your payroll history

information from another system into Sage HRMS using a CSV file. Once imported, employees will be able to see their paychecks in Sage HRMS Employee Self Service.

This feature is enabled on the Integrations tab of the System Maintenance utility. Once turned on, a new menu item will be available in the Connected Service menu called - "Import Pay History."

The import file must follow the data requirements as defined in the [File Specifications](#). To create this file, ask your payroll processor to export the employee's paycheck information based on these specs. You can also create the CSV file manually. When selecting the file to import, the system checks the file extension and size. Once a valid file is uploaded, the Administrator must click Continue to start the Import Pay History process. The process status can be viewed from the Process Log on the Process Management screen.

Access the Process Log by clicking the Process Management icon from the top toolbar and selecting the Process Log link. The Process Log page displays the details and results of the Import Pay History process. Clicking the Refresh button will update the Status column. Once the process has "Completed", a report icon will be displayed. Select the report icon and click the Audit Report link to open the report. The report will be opened in a pop-up browser window over the web application.

The Audit Report will list the results of each individual SSN and Check Number combination. If the import process encounters an issue, the column with the invalid data is listed with the respective SSN and Check Number combination. A message stating the check did not import is also displayed. If the data was imported successfully, the check number, the employee's SSN and the check date are included on the report as "imported successfully." You can also print the report.

This feature is available for customers with the premium version of Sage ESS using the Sage HRMS HR Only product or the Sage HRMS Integrated product. The Import Pay History process supports both U.S Payroll and Canadian Payroll.

Enhancement to Terminated Employees ESS Access

We have made an enhancement in ESS that gives the Master user the ability to grant temporary access to Sage HRMS Employee Self Service to terminated employees. On the

Logon Setup page, a new field called Days To Expiration is enabled when the Terminated employee status is set to 'Yes.' Changing the Terminated field to 'Yes' allows terminated employees to log on to ESS; however, the Days To Expiration field will now limit the number of days a terminated employee can access ESS (when the field value is greater than zero).

The value entered in the Days To Expiration field is used to determine the set number of days a terminated employee will have access to ESS based upon their termination date. All terminated employees will have an Access Expiration date associated with their ESS account. This date is displayed on the ESS Logon Maintenance details page when this feature is turned on. For example, John Doe is terminated on August 1 and the Days To Expiration is set to 90 'days.' John Doe will have 90 days after his termination date or until December 1st to access ESS. The Access Expiration date will show as '12/01/20xx' on John Doe's Logon Maintenance account record. This example applies to all terminated employees.

In addition to the above changes to the Logon Setup page, ESS Administrators can also modify the Access Expiration date directly on the Logon Maintenance page for each terminated employee (If the ESS Account Status is active and the Employee Status is Terminated.). To change the employee's Access Expiration date, select the 'Override Access Expiration' check box on the Logon Maintenance detail page and enter or select a new date and save your changes.

The above changes also impact the Mobile version of ESS. Terminated employees have the same level of access in both applications. ESS Administrators can also use the Logon Maintenance page in the Mobile version of ESS to override the Access Expiration date of terminated employees when the Terminated employee status is set to Yes.

Note: Setting the 'Days To Expiration' field on the Logon Setup page to zero days will prohibit terminated employees from accessing ESS. In addition, if the organization has set the Terminated employee access to No on the Logon Setup screen, the 'Override Access Expiration' field will not be displayed on the Logon Maintenance detail page.

Logon Maintenance page Enhancement

Modifications have been made to the Logon Maintenance summary and detail pages to provide additional information regarding the user's HRMS employment status and their Sage HRMS Employee Self Service account status.

The Logon Maintenance summary page now includes the columns "Employee Status" and "Account Status." The "Employee Status" column refers to the employee's employment status in Sage HRMS. The "Account Status" column refers to the employee's account status in Sage HRMS Employee Self Service (Active or Locked). These changes have also been implemented in the Mobile version of Sage HRMS Employee Self Service.

Sage HRMS Payroll has been upgraded to the latest Payroll version and System Manager version

Sage HRMS Payroll has been upgraded to the Sage 300 Payroll 2025 and the latest System Manager. This change means that Sage HRMS customers are on latest version of payroll and can continue to take advantage of any Payroll changes made in this version.

The Check Number field has been increased to 15 digits in Q3. To support this change in the Payroll module, all supported check forms and Payroll reports that include the check number field have been updated to this new length in both U.S. Payroll and Canadian Payroll. Also, the Employee Payroll Activity page has been changed to support 15 digits. If a check is opened from this page, the Check Number field on the Payroll Check Inquiry dialog will also display up to 15 digits .

Important! As with all Payroll and System Manager Upgrades, follow the recommendations below:

- Before upgrading, create a backup copy of all of your payroll customized reports and check forms
- After upgrading, remember to restore your custom payroll report folders and copy the latest .DLL files for each customized payroll report to the appropriate folder

Aatrix installer updated in Q3

The Aatrix installer has been updated. You can now update your Aatrix forms using the Forms Update UI without any errors.

Check Field Number Expansion to 15 Digits

We have made changes to the desktop version of Sage HRMS to support the Sage 300 Payroll change to allow check numbers to be up to 15 characters.

Note: If you are using Custom Checks and want to take advantage of the increased check number field length, you must reinstall the Sage Payroll Check Print Server after upgrading to Q3 2024. Reach out to Sage HRMS Customer Support if you already use custom checks and need the increased field length. You can also reach out to Customer Support if you are interested in purchasing the Custom Checks add-on.

Vets 4212 Form updated for 2024

The Vets 4212 form has been updated for 2024.

Crystal Reports does not display in Connected Services Issue Resolved

Fixed an issue where Crystal Reports 2020 was not available on the Connected Services menu when accessing Sage HRMS as a non-admin user.

Non-Premium (Existing) version of Sage HRMS and ESS product updates

This update includes changes to the non-premium (existing) version of Sage HRMS. There are no updates to the non-premium (existing) version of Sage HRMS Employee Self Service.

Product Updates	Non-Premium (Existing) HRMS	Non-Premium (Existing) ESS
Upgrade desktop version of Sage HRMS Payroll to Sage 300 2025 Learn more	Yes	N/A
Aatrix installer updated in Q3 Learn more	Yes	N/A
Check Field Number Expansion to 15 Digits Learn more	Yes	N/A
Vets 4212 Form updated for 2024 Learn more	Yes	N/A
Crystal Reports does not display in Connected Services Issue Resolved Learn more	Yes	N/A

Upgrade desktop version of Sage HRMS Payroll to Sage 300 2025

Sage HRMS Payroll has been upgraded to the Sage 300 Payroll 2025 and the latest System Manager. This change means that Sage HRMS customers are on latest version of payroll and can continue to take advantage of any Payroll changes made in this version.

The Check Number field has been increased to 15 digits in Q3. To support this change in the Payroll module, all supported check forms and Payroll reports that include the check number field have been updated to this new length in both U.S. Payroll and Canadian Payroll. Also, the Employee Payroll Activity page has been changed to support 15 digits. If a check is opened from this page, the Check Number field on the Payroll Check Inquiry dialog will also display up to 15 digits .

Important! As with all Payroll and System Manager Upgrades, follow the recommendations below:

- Before upgrading, create a backup copy of all of your payroll customized reports and check forms
- After upgrading, remember to restore your custom payroll report folders and copy the latest .DLL files for each customized payroll report to the appropriate folder

Aatrix installer updated in Q3

The Aatrix installer has been updated. You can now update your Aatrix forms using the Forms Update UI without any errors.

Check Field Number Expansion to 15 Digits

We have made changes to the desktop version of Sage HRMS to support the Sage 300 Payroll change to allow check numbers to be up to 15 characters.

Note: If you are using Custom Checks and want to take advantage of the increased check number field length, you must reinstall the Sage Payroll Check Print Server after upgrading to Q3 2024. Reach out to Sage HRMS Customer Support, if you already use custom checks and need the increased field length.

You can also reach out to Customer Support if you are interested in purchasing the Custom Checks add-on.

Vets 4212 Form updated for 2024

The Vets 4212 Form has been updated to show the current year.

Crystal Reports does not display in Connected Services Issue Resolved

Fixed an issue where Crystal Reports 2020 was not available on the Connected Services menu when accessing Sage HRMS as a non-admin user.

My Workforce Analyzer updates

This update does not include any new features or improvements to My Workforce Analyzer.

Sage 100 Payroll Link updates

This update does not include any new features or improvements to Sage 100 Payroll Link.

How to choose the right product update

Please review the chart below to help determine which download .exe you need to install.

If you have this product:	You should Install:	Quarterly Version
Premium desktop version of Sage HRMS	SageAbraSQLHRMS10.70.71.17.exe	10.70.71.17-2024 Q3
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.101501_premium_web_HRMS_ESS.exe	21.10.15.01 - 2024 Q3
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10.70.71.17.exe	10.70.71.17-2024 Q3
Existing version of Sage HRMS Employee Self Service	N/A	N/A

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage HRMS. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll > Government Reports > Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

<https://partner.aatrix.com/partners/sagehrms>

Premium web version of Sage HRMS installation instructions

This section includes instructions for installing the premium web version of Sage HRMS for customers who have not purchased Sage HRMS Employee Self Service.

Note: You must install the latest quarterly update of the premium version of Sage HRMS before installing the premium web version of Sage HRMS.

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

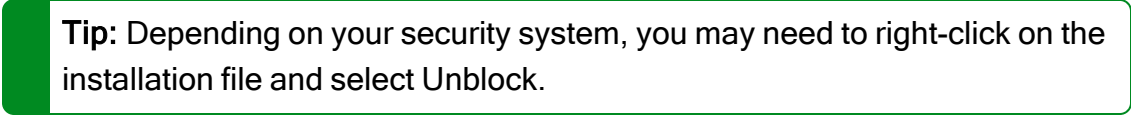
Before you start:

- Refer to Chapters 1 and 2 in the [Sage Employee Self Service Installation and Setup Guide](#) for Pre-installation Setup and System Configuration requirements.
- See Sage Knowledgebase article [225924250083549](#) for System Recommendations for the premium web version of Sage HRMS.
- 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.
- 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 HRMS Download Portal](#).
2. Click the appropriate download link and log in if required.
3. In the article, click **Download** to download the product update.

Installing the premium web version of Sage HRMS update

1. Using your external backup procedures, back up the Sage HRMS databases to a media device that is external to your product servers:
 - a. Prepare to install premium web version of Sage HRMS by closing all Windows applications.
 - b. Run the setup.exe file provided with the installation package with Administrative privileges (right-click the file and select **Run as Administrator**).
 - c.  **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.
2. The premium web version of Sage HRMS Setup prepares the InstallShield Wizard.
3. The Welcome to the InstallShield Wizard for Sage HRMS is displayed. Click **Next**, and then follow the prompts on the InstallShield Wizard.
4. In the License Agreement window, read the License Agreement, accept the terms of the license agreement, and click **Next**.
5. In the Customer Information window, enter your User Name and Organization. Uncheck the Install Sage HRMS Employee Self Service checkbox if you are not installing ESS and then click **Next**.
6. In the Destination Folder window, select the path and directory where you want the premium web version of Sage HRMS and its components installed. This must be a local drive. Click **Next**.
7. In the Sage HRMS SQL Server Setup window, specify the server configuration for the Sage HRMS database. Enter the Server Name, Username, Password, and Database. Click **Next**.
8. In the Sage HRMS Web Alias window, the Name/Alias is initially set to "selfservice," but you can change it. The Name/Alias is used to access the premium web version of Sage HRMS from a web browser. Click **Next**.
9. In the Email Configuration window, you must select Enable Emails (SMTP) to install the premium web version of Sage HRMS. Click **Next**.
10. In the SQL Server Setup window, specify your version of SQL Server (the default database embedded with Sage Employee Self Service). Enter the Server Name, Username, Password, and Database. You must provide a SQL Server logon that uses or emulates your SA (System Administrator) permissions. Click **Next**.

11. On the Ready to Install the Program window, click **Install** to proceed with the installation.
12. The system displays Installation windows indicating the progress of the installation. When the InstallShield Wizard Completed window appears, click **Finish**.
13. When the update is complete, click **Yes** to restart your system.
14. After your Sage HRMS server restarts, go to the **Start** menu and select **All Programs > Sage HRMS (Web Version) > System Maintenance** to open the System Maintenance utility. Verify that all the information on the **Configuration and Settings** tab is correct.
15. On the **Configuration and Settings** tab, click the **Generate Master Password** button and copy the password provided to log into the premium web version of Sage HRMS as the Master user.
16. Click Save.
17. Exit the System Maintenance utility.
18. In your browser, navigate to the web alias you entered in Step 8 during the install.
19. Log into the web version Sage HRMS as the MASTER user to complete the install process.

The update is now complete and you are ready to start using the premium web version of Sage HRMS.

Premium web version of Sage HRMS with Sage ESS update installation instructions

After you have downloaded the premium version of 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 HRMS Download Portal](#).
2. Click the appropriate download link and log in if required.
3. In the article, click **Download** to download the product update.

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.

Sage HRMS update installation instructions

Important! Starting with Sage HRMS Q1 2024, Sage HRMS Integrated now uses enhanced security features. User security policies are now enforced by Windows Account Policies on the machine running MS SQL Server. If you are unfamiliar with these changes, please review the information below before proceeding.

Upgrade Prerequisites

- Back up your databases.
- Back up your Site folder and User folder within the Shared Data folder.
- Create a backup copy of all of your payroll customized reports and check forms before upgrading.
- Review your Local Security Policies on your SQL Server machine and set the Minimum Password age to 0.
- Verify that you are upgrading from a supported version of the Payroll Modules.
- Verify you have access to the Sage HRMS Client using the Master user account information before upgrading.
- Review the sharing settings on the SageHRMSServer folder.
- Verify the SQL account to be used during the installation has full DB Create (administrative) credentials.

Enhanced Security Features

The following changes were made to support these features:

- During the Sage HRMS Client upgrade, there may now be a forced restart of the Client and the windows server machine.
- If this is necessary, the user is presented with a new message stating that: “Sage HRMS Client needs to restart. Save all your files before continuing.”

- The Sage HRMS Client wizard will create two new MS SQL databases (Vault and Store) during the upgrade.
- The user will be prompted to change the default password for the Payroll Administrator (Sage 300) during the Sage HRMS Client upgrade to meet the new password complexity rules if it is not complex enough.
- Password Complexity Rules dictate that a password must have a minimum length of 8 characters, with a minimum of 1 lower-case character, 1 upper-case character, 1 numeric character, and 1 special character.
- The Minimum password length security policy will be set to 8 characters.

After upgrading

- Use the Database Connection Tool to ensure all connections are valid.
- Verify the ADMIN user can successfully access the Database Setup tool using their new complex password
- Restore your custom payroll report folders:
 - The report .DLL's have been updated to a newer version and must be copied to your customized payroll report folders.
 - The updated .DLL's are located on the Sage HRMS Client machine at the following path: C:\Program Files (x86)\Sage\Sage Accpac\ - UP80A or CP80A.
 - Copy only the .DLL's used for each of your customized payroll reports.
- The following Sage 300 payroll modules have also been updated:
 - Bank
 - General Ledger
 - System Manager

Follow the instructions in this section to download, install, apply, and verify the Product Update for all desktop versions of Sage HRMS.

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 HRMS Download Portal](#).
2. Click the appropriate download link and log in if required.
3. In the article, click **Download** to download the product update.

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.

Note: If you have not already entered your Sage customer account number on the About Sage HRMS page, the first person who logs in to Sage HRMS after this product update is installed will be required to enter your Sage customer account number.

You can review or change your customer account number in **Help > About 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: September 19, 2024.

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.

Updating the local tax repository and rates

This section applies only if you use local tax codes in U.S. Payroll.

To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage HRMS.
2. On the Local/Other Tax Codes window, click the **Install Repository** button to update all of the local tax rates in the system.
3. When asked if you want to continue updating company-level local tax records with information from the local repository, click one of the following:
 - **Yes** to automatically update the company rates for all local taxes.
 - **No** to update local taxes individually (select each tax and click the Update button to apply the rate changes). Doing this enables you to validate rates before and after the changes.
4. Depending on your choice in the previous step, update employee-level local tax records as follows:
 - If you clicked **Yes** in the previous step, when asked if you want to continue updating employee local tax records from the local tax repository, click one of the following:
 - **Yes** to automatically update the employee-level rates for all local taxes.
 - **No** to select each employee or use the Update Taxes tax, then update each tax or employee individually.

- If you clicked **No** in the previous step, you must manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll > Update Taxes**, or by individual employee from **Employee Payroll > Taxes**.

Important! This process requires security permissions in Sage HRMS to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.

System Recommendations for Sage HRMS and Sage HRMS Employee Self Service

There are no changes to the System Recommendations for all versions of Sage HRMS and Sage HRMS Employee Self Service. See Sage Knowledgebase article [225924250083549](#) for the current hardware and software recommendations for Sage HRMS and Sage HRMS Employee Self Service.