

Sage HRMS

U.S. Payroll

Q1 2023 Release Notes

April 2023

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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 Q1 2023

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.

U.S. 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.

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.

Delaware

The Unemployment Insurance wage base limit changes to \$10,500 for 2023.

Illinois

The Unemployment Insurance wage base limit changes to \$13,271 for 2023.

Kentucky

- Effective January 1, 2023, the following local tax has been expired:

Code	Description
KY0272	Union CT Regular IT

- The following local tax has an updated rate in the supported tax tables:

Code	Description	Rate	Effective Date
KY0233	Perryville CT Regular IT	1.5%	1/1/2023

Maryland

- Maryland withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.
- The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
MD3194	Cecil, Maryland Regular IT	2.85%	1/1/2023
MD3205	St Mary's, Maryland Regular IT	3%	1/1/2023

Ohio

The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OH0134	Rittman CT Regular IT	1%	1/1/2022
OH1053	Fairfield TP JEDD CT Regular IT	1.5%	12/15/2022

Pennsylvania

- For 2023, the Unemployment Insurance wage base limit remains at \$10,000, and the employee rate increases to 0.07%.
- The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
PA1300	Kulpmont BO, Mount Carmel SD (NR) LST	\$52	1/1/2023
PA2679	Falls TP, Pennsbury SD (NR) Regular IT	1%	2/1/2023
PA2680	Falls TP, Pennsbury SD Regular IT	1%	2/1/2023
PA4565	New Castle CT, New Castle SD (NR) Regular IT	1.856%	1/1/2023
PA6175	Narberth BO, Lower Merion SD (NR) Regular IT	0.5%	1/1/2023
PA6176	Narberth BO, Lower Merion SD Regular IT	0.5%	1/1/2023

Product updates

The following product updates are included with this release.

Payroll product updates

The following new features and improvements to U.S. payroll are included with this update.

Specify occupational and worksite county codes for employees who work in West Virginia

For employees who are subject to West Virginia taxes, quarterly payroll reports include the occupational and county codes. On the Payroll Employee Supplemental Information window, if the Report Authority ID is West Virginia:

- On the Defaults tab:
 - Enter the **Occupational Code** as a default for your employees. The only exceptions will be employees who you have specified on the Employee tab.
 - If **Report Multiple Worksite Data** is selected, enter the **Worksite County Code** as a default for your employees. The only exceptions will be employees who you have specified on the Employee tab.
- On the Employee tab:
 - Enter the **Occupational Code** for the individual employee.
 - If **Report Multiple Worksite Data** is selected, enter the **Worksite County Code** for the individual employee.

Premium version of Sage HRMS product updates

This update does not include any new features or improvements to HR.

Premium web version of Sage HRMS product updates

Introducing the new Sage HRMS brought to you on the web!

We are excited to announce the launch of the NEW premium web version of Sage HRMS!

This release introduces a convenient single sign-on solution that can be accessed via a web browser, allowing you to complete your work anywhere, anytime. HRMS Admin users can now complete their tasks without needing to work in person, VPN into offices machines, or hand work off to their in-office colleagues to manage maintenance.

Users who already have the Sage Employee Self Service product can now log in to one product to manage themselves and their team. First time web users have the opportunity to see how much easier web-based user management can be.

With modernized and streamlined interfaces and navigation, it's easier than ever to manage your HR and Time Off data via your browser.

Web Version Functionality

The initial web release includes the Employee Information pages and Employee Tasks. This release focuses on providing frequently accessed pages for the maintenance of employee data, including Personal detail pages, Job and Pay, Benefits, Time Off and more.

The release also includes many time-sensitive employee tasks, including Add New Hire, Change Job and Pay, and Assign To and Return From Leave of Absence.

All multi-step employee tasks provide the HR Admin with the choice of completing applicable steps at the time of entry or creating a reminder for themselves or another user to complete the data entry at a later date.

The web version of Sage HRMS also introduces the Process Management interface, which allows users to view the status of in-progress processes that do not run instantaneously.

Navigation Details

The menu structure for the Employee pages has been retained from the desktop version of Sage HRMS to allow for easy navigation in the web version.

The initial web version of Sage HRMS will include the following screens, tasks and processes:

Personal

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

Job and Pay

- Current Pay
- Current Job
- Job History

Benefits

- Wellness
- Savings Benefits
- Insurance Benefits
- Dependents and Beneficiaries

Time Off

- Absence Transactions
- Attendance Summary

Note: The Time Off Summary interface is read only in the initial web version release, and will be updated to allow processing in an upcoming release.

Safety

- OSHA
- OHS

Note: The Workers' Compensation interface will be included in an upcoming release.

Career

- Skills
- Education
- Previous Employer

Employee Tasks

- Add New Hire
- Change Job
- Change Job and Pay
- Change Pay
- Change Personal Status
- Delete Employee Record
- Rehire Employee
- Return from Leave of Absence
- Assign Leave of Absence
- Terminate Employee

Employee Processes

- Update Benefits

Other Functionality

- Process Management
- Reminder Scheduler

Please note, not all of the functionality available in the desktop version of Sage HRMS will be available in the web version upon launch. Any screens, tasks, or functionality that cannot be completed via the web can still be completed via the desktop version of Sage HRMS, and additional functionality will be included with each quarterly release.

Product Functionality Improvements

The introduction of a web based Sage HRMS product allows for many improvements to the functionality and flow of user and process management. One goal of development was to implement changes that allow users to navigate more easily, and to provide a clearer view of the information they are entering. While there are more improvements on the horizon, some of the biggest day one items include:

Clearer Input Interfaces and Functionality

The web version of Sage HRMS has been designed to make screen legibility and navigation less difficult.

- Field layout and spacing improvements for screen legibility
- Borders to indicate which cell is active and being edited
- Date and Time pickers on all applicable fields
- Improved numeric entry formatting

Improved Menu Navigation

New navigational features have been introduced to make moving through the web version of Sage HRMS quicker and easier than ever.

- Collapsible/Expandable menu to increase screen real estate
- Individual tabs on many UI screens are now sections within a single page, and can be quickly navigated to via an anchored menu
- Tasks now display a navigational header to indicate where in the process the user is, and which steps are upcoming

Simplified Button Layouts

Button design and functionality has been improved to remove redundant button options.

- The number of button options has been reduced to improve clarity of functionality
- Buttons now show active/inactive based on the state of the page

Easier Error Identification

The move to a browser now allows for more specific indicators of what fields are generating validation errors, and why.

- Error indicators now highlight affected cells for easier identification of validation failures
- If an interface utilizes tabs, any tab containing a field with an error will also be highlighted
- Users can now hover over individual cells to view the validation message associated with the field
- Validation message improvements have been made to make fixing validation errors easier

Conclusion

We hope you are as excited to try the new web based Sage HRMS tool as we are, and that the move to a browser based version will improve your quality of life when using our products.

With each quarterly release we will add more new features and functionality to the web version until you have a complete web based HRMS solution.

Our goal is to deliver to you in 2023:

- Time Off Tasks and Processes
- Add/Modify Employer and HR Setup and Code tables
- Open Enrollment Setup
- Improved and updated training modules
- US Payroll interfaces and processing
- Enhancements to the Sage 100 and Sage 300 payroll integrations
- Select Standard Reports
- Process Scheduling

Premium version of Sage HRMS Employee Self Service product updates

The following features are now included the premium version of Sage HRMS Employee Self Service:

System Maintenance

The System Maintenance utility now also supports the premium web version of Sage HRMS. The "Import Pay History" tab has been removed and a new tab called "Processes" has been added. This tab has been added to manage the Sage HRMS Process service. This service is used to process Sage HRMS tasks executed in the premium web version of Sage HRMS.

Logon Maintenance

The Master user and users assigned to the ESS role of HR Admin can use the Logon Maintenance page to "tie" ESS user accounts to Sage HRMS. This functionality supports the premium web version of Sage HRMS.

Sage HRMS Employee Self Service Install Changes

The install package now includes the premium web version of Sage HRMS and the premium version of Sage HRMS Employee Self Service.

Additional Change

Removed the following change below that was released in Q3 2022.

This change was creating issues with some customers that were using this feature.

We will revisit and reevaluate adding this feature back in a future release of ESS.

Open Enrollment / Life Event Waived Benefit Records

When an employee Waives Coverage on a Benefit Plan during Open Enrollment or a Life Event, the Benefit Plan will now be available on the employee's Insurance Benefit page and will display the Waive Date on the plan.

Existing version of Sage HRMS product updates

This update does not include any new features or improvements to HR.

Existing version of Sage HRMS Employee Self Service product updates

Removed the following change below that was released in Q3 2022.

This change was creating issues with some customers that were using this feature.

We will revisit and reevaluate adding this feature back in a future release of ESS.

Open Enrollment / Life Event Waived Benefit Records

When an employee Waives Coverage on a Benefit Plan during Open Enrollment or a Life Event, the Benefit Plan will now be available on the employee's Insurance Benefit page and will display the Waive Date on the plan.

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.

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>

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: March 16, 2023.

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.

Premium web version of Sage HRMS installation instructions

This section includes instructions for installing the Premium web version of Sage HRMS for customers who only have Sage HRMS.

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:

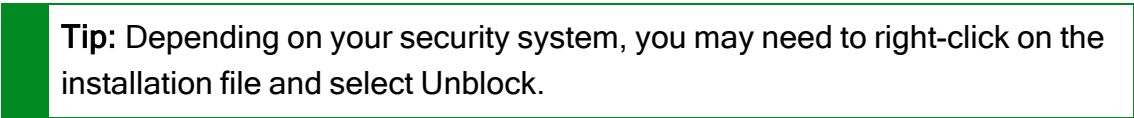
- Refer to Chapters 1 and 2 in the [Sage Employee Self Service Installation and Setup Guide](#) for Pre-installation Setup and System Configuration requirements.
- See Sage Knowledgebase article [115897](#) for System Recommendations for the premium web version of Sage HRMS.
- Verify that Sage HRMS has 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 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 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. For configuration info, see the Sage HRMS (Web Version) Setup and Configuration section in this document.

Existing version of Sage HRMS Employee Self Service update installation instructions

Note: Some features in this release of Sage HRMS Employee Self Service are for the premium version of Sage HRMS only. 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.

Premium version of Sage HRMS Employee Self Service 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 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.

Premium web version of Sage HRMS Setup and Configuration

This section includes instructions for setting up the premium web version of Sage HRMS.

After installing the premium web version of Sage HRMS, the following steps must be completed to see the HRMS menu items.

1. From the Start menu on the server where the web version of Sage HRMS is installed, select All Programs > Sage HRMS (Web Version)> System Maintenance to open the System Maintenance utility.
2. On the **Configuration and Settings** tab, click the **Generate Master Password** button and copy the password provided to log into Sage HRMS (Web Version) as the Master user.
3. Click Save.
4. Exit the System Maintenance utility.
5. In your browser, navigate to the Sage HRMS Web Alias you entered in Step 8 of the install.
 - a. For example: `http://{servername}/selfservice/`
6. Log into the web version Sage HRMS using the Master username and the password you copied from step 2 above.
7. Click Sign In.
8. Select System Admin > Roles and Logon > Logon Setup.
9. On the Logon Setup page for Initial Logon Fields, select the check boxes for one or more fields (such as Last Name or Email Address).
10. In the Employee Status area, select the check boxes for one or more employee statuses for employees who are allowed to create a logon, change their password, and log on to the system.
11. In the Password Properties area and Logon Properties area, specify the properties.
12. In the Logon Reset Message area, enter a custom message that your employees will see when they cannot successfully log on and they click the Username and Password Help link on the Sage HRMS logon page.

13. At the bottom of the Logon Setup page, select five security questions to present to a user when they attempt to create a new logon.
14. Click Save.
15. Select System Admin> Roles and Logon > Change Password.
16. On the Change Password page for Password, type new password for your master user, following the requirements shown on the page.
17. For Confirm Password, type the new password again to confirm.
18. Click Save.
19. Select System Admin> Roles and Logon > Logon Maintenance.
20. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
21. In the search results table, click the employee's name.
22. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
23. Click Save.
24. Repeat steps 14 -18 for each user that requires access to the web version of Sage HRMS.
25. System Setup
 - a. Select System Admin> select System Settings > System Setup.
 - b. On the System Setup page, enter or select the appropriate setting for each item in the following areas of the page:
 - Message Center
 - Display Notifications Since
 - Archive Messages
 - Deleted Archive Messages Prior To
 - Email Notification
 - Include Custom Message
 - Technical Administration

- Technical Admin Email Address
- System Emails Sent From
- Mail Relay

First-Time User Register Here

A User account is required to access to the web version of Sage HRMS.

1. On the Logon page, click **First-Time User Register Here**
2. On the Create New Logon page:
3. Enter the requested information.
4. If included by your administrator, select a Security Question, and then type the Security Answer.
5. Click Next.
6. On the second Create New Logon page:
 - a. Enter the Username that you want to use.
 - b. Enter your Password again to confirm it.
 - c. Enter the Password that you want to use.
 - d. Click Save.
7. You are now logged into the Premium web version of Sage HRMS and should see the HRMS menu items.

Premium version of Sage HRMS Employee Self Service Setup and Configuration

This section includes instructions for setting up the premium web version of Sage HRMS to work with ESS.

After installing the premium version of Sage Employee Self Service, the following steps must be completed to see the HRMS menu items.

1. Log into the premium web version of Sage Employee Self Service as the Master user.
2. Select System Admin > Roles and Logon > Logon Maintenance.
3. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
4. In the search results table, click the employee's name.
5. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
6. Click Save.
7. Repeat steps 3 - 7 for each user that requires access to the web version of Sage HRMS.
8. Verify the settings on the System Setup page
 - a. Select System Admin > select System Settings > System Setup.
 - b. The following settings on the System Setup page impact the web version of Sage HRMS:
 - i. Message Center
 - ii. Email Notification
 - iii. Technical Administration

Sage HRMS Employee Self Service HR Administrators

Users assigned to the role of HR Admin in Sage HRMS Employee Self Service can also "tie" ESS user accounts to Sage HRMS.

1. Log into the premium version of Sage Employee Self Service as an ESS HR Administrator.

2. Select the System Administrator menu in Sage HRMS Employee Self Service.
3. On the System Administrator menu, select Roles and Logon > Logon Maintenance.
4. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
5. In the search results table, click the employee's name.
6. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
7. Click Save.

Note: Users with access to both the premium web version of Sage HRMS and Sage HRMS Employee Self Service can toggle between products by clicking the product name in the title bar.