

Sage HRMS

U.S. Payroll

Q1 SR1 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 SR1 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.
- **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

Federal Legislative Updates

There are no federal legislative updates with this release.

Product updates

Payroll product updates

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

Premium version of Sage HRMS product updates

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

California Pay Data Reporting

California Pay Data Reporting has been updated with the latest legislative requirements. The new due date for the 2022 Pay Data Report is May 10, 2023.

To support the changes to California Pay Data Reporting, a new tab called “EEO Pay Data” has been added to the Current Pay page in the desktop version of Sage HRMS. The fields - “Pay Band and Total Hours Worked” have been removed from the Current Pay tab and are now displayed on the “EEO Pay Data” tab. In addition, a new field called “Hourly Rate” has also been added to capture the employee’s “hourly rate”. For more information, see Sage Knowledgebase article [114822](#).

Code Tables

Fixed an issue where a new code table did not display after adding it. The code table is now available after the page refreshes.

Custom Details

Custom Details can now be accessed without receiving an error.

Premium web version of Sage HRMS product updates

The following changes to the premium web version of Sage HRMS are included with this update.

Advanced Find

We have implemented a performance improvement to the Advanced Find.

Security Change

A security update is included in this release.

California Pay Data Reporting

The Current Pay page in the premium web version of Sage HRMS has been updated to support the latest California Pay Data Reporting requirements. A new section called "EEO Pay Data" is displayed where you can enter and update the information required for the pay data report. For more information, see Sage Knowledgebase article [114822](#).

Premium version of Sage HRMS Employee Self Service product updates

This update does not include any new features or improvements to Sage HRMS Employee Self Service.

Existing version of Sage HRMS product updates

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

California Pay Data Reporting

California Pay Data Reporting has been updated with the latest legislative requirements. The new due date for the 2022 Pay Data Report is May 10, 2023.

To support the changes to California Pay Data Reporting, a new tab called “EEO Pay Data” has been added to the Current Pay page in the desktop version of Sage HRMS. The fields - “Pay Band and Total Hours Worked” have been removed from the Current Pay tab and are now displayed on the “EEO Pay Data” tab. In addition, a new field called “Hourly Rate” has also been added to capture the employee’s “hourly rate”. For more information, see Sage Knowledgebase article [114822](#).

Code Tables

Fixed an issue where a new code table did not display after adding it. The code table is now available after the page refreshes.

Custom Details

Custom Details can now be accessed without receiving an error.

Existing version of Sage HRMS Employee Self Service product updates

This update does not include any new features or improvements to Sage HRMS Employee Self Service.

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: April 20, 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:

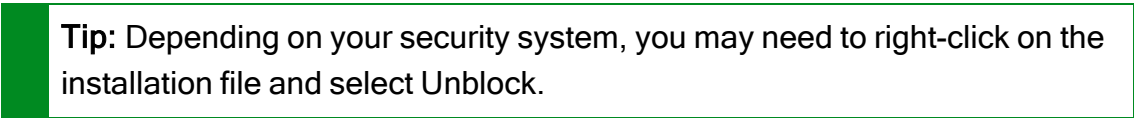
- Refer to Chapters 1 and 2 in the [Sage Employee Self Service Installation and Setup Guide](#) for Pre-installation Setup and System Configuration requirements.
- See Sage Knowledgebase article [115897](#) for System Recommendations for the premium web version of Sage HRMS.
- Verify that Sage HRMS has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

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.