Sage HRMS

U.S. Payroll
Q2 2023 Release Notes

June 2023

Contents

Contents

Product update release notes

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

Product update information

Product: Sage HRMS and Sage HRMS Employee Self Service

Version: Product Update Q2 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.

Arkansas

Retroactive to January 1, 2023, the personal income tax rate has been reduced from 4.9% to 4.7% for those who make between $24,300 and $87,000.

Arkansas withholding tables and instructions have been updated. Refer to the state publication for more details.

Kentucky

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
KY0116	Russell CO Regular IT	1%	4/1/2023
KY0200	Cadiz CT Regular IT	1.9%	4/1/2023
KY0204	Breathitt CO Regular IT	2%	2/1/2023
KY0273	Mason CO Regular IT	1%	5/1/2023
KY0274	Grand Rivers CT Regular IT	1%	3/1/2023
KY0275	Hanson CT Regular IT	1.5%	7/1/2023
KY0276	Union CT Regular IT	2%	7/1/2023

Idaho

The number of tax brackets has been decreased to two from four. The income tax withholding tables have been updated with lower tax rates. Idaho withholding tables and instructions have been updated, effective May 16, 2023. Refer to the state publication for more details.

Michigan

Retroactive to January 1, 2023 and only in effect for 2023, the income tax rate has been reduced from 4.25% to 4.05%. Michigan withholding tables and instructions have been updated. Refer to the state publication for more details.

New York

Effective July 1, 2023, the employer rates for Metropolitan Commuter Transportation Mobility Tax (NY0007) have changed. Refer to the state publication for more details.

Ohio

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
OH0182	Lordstown VI Regular IT	1.5%	7/1/2023
OH0205	Wilmot VI Regular IT	1%	1/1/2023
OH0339	Lakeview VI Regular IT	1%	7/1/2023
OH0428	Indian Hill VI Regular IT	0.475%	1/1/2023
OH0503	Bucyrus CT Regular IT	2.25%	7/1/2023
OH1054	Marysville-Jerome TP JEDD CT Regular IT	1.5%	3/15/2023
OH1055	Perry-Canton 22-01 JEDD CT Regular IT	2.5%	3/9/2023
OH1056	Turtlecreek-Monroe 2022 JEDD CT Regular IT	2%	4/1/2023
OH1057	Berkshire TP JEDD II CT Regular IT	1.85%	11/1/2001
OH1058	Stockport VI Regular IT	1%	7/1/2023
OH1059	Warsaw VI Regular IT	1%	7/1/2023

Oregon

Effective July 1, 2023, the Eugene Community Safety Payroll Tax exemption will increase accordingly with Oregon state minimum wage. The minimum rates will increase as follows:

- Standard Minimum Wage: $14.20 per hour
- Portland Metro Minimum Wage: $15.45 per hour
- Non-Urban Minimum Wage: $13.20 per hour

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article [111399](#)

Pennsylvania

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
PA2328	Johnstown CT, Greater Johnstown SD (NR) LST	$52	4/29/2023
PA3610	East Allen TP, Northampton SD Regular IT	1.45%	1/1/2023
PA6983	South Whitehall TP, Parkland SD (NR) Regular IT	0.5%	1/1/2023
PA7946	Scranton CT, Scranton SD Payroll Preparation Tax	1.034%	1/1/2023

Utah

Retroactive to January 1, 2023, the personal income tax rate has been reduced from 4.85% to 4.65%. Utah withholding tables and instructions have been updated. Refer to the state publication for more details.

Washington

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
WA0005	Washington Cares Fund Tax	0.58%	7/1/2023

For more information, including details about setting up local tax codes, see Sage Knowledgebase article [95277](#).

West Virginia

Retroactive to January 1, 2023, the personal income tax rate for the top income bracket for individuals[1] or married individuals filing separately has been reduced from 6.5% to 5.12%. For individuals, the top bracket is over $60,000. For married individuals filing separately, the top bracket is over $30,000.

West Virginia withholding tables and instructions have been updated. Refer to the state publication for more details.

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
WV0013	Smithers CT Service Fee	$52	1/1/2023

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[1] Individual includes individuals filing joint returns, heads of households, and estates and trusts; however, it does not include married individuals filing separate returns.

Product updates

The following product updates are included with this release.

Payroll product updates

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

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
Sage Branding Updates in the Web Learn more		Yes	Yes
Time Off Feature Additions and Improvements Learn more		Yes	
Quick Find Functionality Learn more		Yes	
Custom Details Page Access Learn more		Yes	
Scheduled Task Step Email Notifications Learn more		Yes	
Workers' Compensation Page Access		Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Learn more			
Change Job and Pay Enhancements Learn more		Yes	
Change Logon Enhancements Learn more		Yes	
Gross-Up Calculator Enhancements Learn more	Yes		
Check Number Field Length Increase Learn more	Yes		
Illinois Equal Pay Act Reporting Changes Learn more	Yes		

Sage Branding Updates in the Web

After the successful launch of the premium web version of Sage HRMS last quarter, we are excited to introduce a variety of new functionalities and improvements to the system to make managing your employees easier than ever.

In addition to new processing options, we've also updated the look and feel of the user interface to align with the current Sage branding. Users will see updates to all areas of Sage HRMS, including Employee Self Service and System Maintenance.

Time Off Feature Additions and Improvements

The Time Off section of the web-based Sage HRMS product was released in Q1 2023 in a simplified and read-only state. This release updates the look and feel of the page, activates the maintenance fields to allow for editing, and introduces a number of Time Off related tasks and processes.

Time Off User Interface

The newest web version overhauls the look and feel of the Time Off page to improve usability, combining all Time Off screens into one easy to use page.

Time Off Functionality

This release activates the Time Off interface in the web version of Sage HRMS, including Time Off plan summary details, Absence Transactions, Accrual information and also introduces a new calendar view of the employee's time taken.

Users will no longer have to manage the following employee Time Off procedures and maintenance tasks in the desktop version of Sage HRMS.

- Adding new time off plans

- Creating new time off transactions

- Reviewing details of individual time off transactions

- Accrue Time

- Manage individual plan details

Time Off Tasks and Processes

In addition to Time Off management, we have also enabled the following Time Off tasks and processes in the web-based Sage HRMS product, with more to follow in upcoming releases.

- Assign Leave of Absence

- Return from Leave of Absence

- Post Absence to Previous Year

- Accrue Time

- Create Absence Transactions

- Add Attendance Plans

- Close Accrual Year

- Post Transaction to Summary

Using Time Off Processes

In addition to introducing these new processes, we have enhanced the usability of the search feature by providing a custom criteria section that can further define your search results. Unlike the desktop version of Sage HRMS, you can now preview a list of employees and remove those that you do not want to include before running the process. We have also implemented the ability to 'Save as Default' and 'Restore Defaults' search criteria for each process.

Quick Find Functionality

The quick find functionality, currently available in the desktop version of Sage HRMS, is now available in the web.

Users can now select between Advanced or Quick find when searching for users. Selecting Quick Find will open a fly out search bar, so users don't have to navigate away from the page when quickly switching between employees.

Custom Details Page Access

The Custom Details page is now available in the web version of Sage HRMS under the Personal menu item. Users can view and make updates to Custom Details pages created in the desktop version of Sage HRMS. Updates made in the web will reflect in the desktop version.

The creation of new Custom Details pages will remain desktop-only at this time, with that functionality brought to the web at a later date.

Scheduled Task Step Email Notifications

New functionality is being introduced with this release to make managing scheduled task steps more efficient. If you have configured Simple Mail Transfer Protocol (SMTP) on your application server, users can now receive a calendar invite for any task step scheduled in the web version of Sage HRMS.

Users can add these task step invites to their calendars to receive an additional reminder to complete scheduled steps.

The task step reminder verbiage has also been updated to include more information, including the associated task, who scheduled the task, and when it was created.

Additional Usability Enhancements

A major focus of this quarterly release was to bring value and utility to our customers by adding the frequently used pages and tools summarized below.

Workers' Compensation Page Access

The Workers' Compensation page is now available in the web version of Sage HRMS under the Safety menu item. Users can review existing Workers' Compensations records and create new records in the web.

Logic updates have been made to ensure all necessary OSHA/OHS reporting has been created prior to beginning a Workers' Compensation form to reduce rework.

Change Job and Pay Enhancements

The Change Job, Change Pay, and Change Job and Pay tasks have been simplified into a single Change Job and Pay task under the Employee Tasks menu item. Users can now use this task to update Job and/or Pay information.

Change Logon Enhancements

The Change Logon functionality, previously listed as a menu item in the ESS menu structure, is now available as part of the Employee Profile popup from the product toolbar. Users can now update their Log In Information from any part of the web-based Sage HRMS program.

Gross-Up Calculator Enhancements

The gross-up calculator has been enhanced to now run calculations for multiple employees at one time based on the earning code that is selected. This method will generate an import file that includes all active employees who have the selected earning to be calculated. Editing the import file is easily accomplished using any text editor. This gives the user the ability to make

changes such as grouping by organizational levels to apply a different Net Pay amount between groups. The .csv file is then selected to import and provides the dataset used to calculate a gross-up amount.

Calculating a gross-up amount for a single employee is also still available and provides the same functionality as in previous releases.

Check Number Field Length Increase

The check number field has been expanded from 9 to 10 characters in the desktop version of Sage HRMS to support Sage 100.

Illinois Equal Pay Act Reporting Changes

Sage HRMS has been updated to support the latest legislative requirements for the Illinois Equal Pay Act (IEPA) Efile. As per the latest EFile requirements, the following changes have been made to the efile template:

- Updated the Gender column to use the Gender "description"

- Added a new column for Hours Worked (HoursWorked)

Existing version of Sage HRMS and ESS product updates

This update does not include any changes to the existing version of Sage HRMS Employee Self Service.

Product Updates	Existing HRMS	Existing ESS
Illinois Equal Pay Act Reporting Changes Learn more	Yes	
Check Number Field Length Increase Learn more	Yes	

Illinois Equal Pay Act Reporting Changes

Sage HRMS has been updated to support the latest legislative requirements for the Illinois Equal Pay Act (IEPA) Efile. As per the latest EFile requirements, the following changes have been made to the efile template:

- Updated the Gender column to use the Gender "description"

- Added a new column for Hours Worked (HoursWorked)

Check Number Field Length

The check number field has been expanded from 9 to 10 characters in Sage HRMS to support Sage 100.

My Workforce Analyzer updates

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

Sage 100 Payroll Link updates

The following change to Sage 100 Payroll Link is included with this update.

Check number field length

The check number field has been expanded from 9 to 10 characters in Sage HRMS to support Sage 100.

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_706412.exe	10.70.64.12 - 2023 Q2
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.100901_premium_web_HRMS_ESS.exe	21.10.09.01 - 2023 Q2
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10_706412.exe	10.70.64.12 - 2023 Q2
Existing version of Sage HRMS Employee Self Service	There is no Sage HRMS Employee Self Service update.	No changes in Q2

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 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 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: June 15, 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 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 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**).
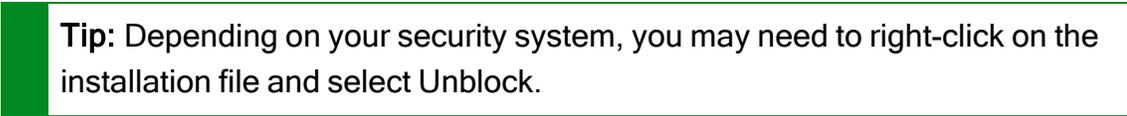
   c.
   > **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

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.

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 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.