

Sage HRMS

U.S. Payroll

Q3 2023 Release Notes

September 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 Q3 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.

Illinois

Effective July 1, 2023, Illinois withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

Indiana

Effective September 15, 2023, for tax code INSIT, any value on the employee's WH-4 Form at Line 7 for first year dependent exemption will need to be added to Line 6 dependent exemptions. For more information about updating this value in Sage 300, see Sage Knowledgebase Article [230912192156750](#).

Kentucky

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

Code	Description	Rate	Effective Date
KY0127	Paintsville CT Regular IT	1.5%	10/1/2023

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

Code	Description	Rate	Effective Date
KY0277	Williamstown CT Regular IT	1.5%	10/1/2023

North Dakota

Effective May 30, 2023, North Dakota withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

New York

- Effective July 1, 2023, the following local taxes have updated descriptions in the supported tax tables:

Code	Description
NY0007	Metropolitan Commuter Transportation Mobility Zone 2 Tax
NY0010	Metropolitan Commuter Transportation Mobility Zone 1 Tax

- Effective July 1, 2023, the following local tax has been expired and replaced:

Expired Code		Replaced with New Code	
Code	Description	Code	Description
NY0008	New York-New Jersey Waterfront Payroll Tax	NY0011	New York-New Jersey Waterfront Payroll Tax

Ohio

Effective September 30, 2023, the following local tax has been expired:

Code	Description
OH0866	Liberty Center JEDD CT Regular IT

Pennsylvania

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

Code	Description	Rate	Effective Date
PA5484	Franklin BO, Conemaugh Valley SD Regular IT	1%	6/15/2023
PA6854	West Sadsbury TP, Octorara SD Regular IT	1%	6/15/2023
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.75%	6/15/2023

Washington

Effective October 1, 2023, the Quarterly Wage Reporting for Paid Leave & WA Cares will require the employee's date of birth. Visit the state publication for more details:

<https://paidleave.wa.gov/help-center/employers/>.

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
Process Scheduler Learn more		Yes	
Process Management Interface Enhancements Learn more		Yes	
Frequently Used Pages Learn more		Yes	
HRMS Time Off Process Enhancements Learn more		Yes	
DB Connect Tool Changes Learn more	Yes		
SAP Crystal Reports runtime engine	Yes		

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Learn more			
Crystal Reports 2020 is now available in Connected Services menu Learn more	Yes		
Vets 4212 Form for 2023 Reporting Learn more	Yes		
Quick Find Learn more	Yes		
Newly added custom fields not available in DDFLD table Learn more	Yes		
Create Custom Menu Learn more			Yes
Sage Branding Updates in the Desktop Learn more	Yes		

Process Scheduler

We are excited to share with you the new Process Scheduler functionality. This feature includes a suite of robust process scheduling options and is available exclusively via the premium web version of Sage HRMS.

With this tool, you will be able to create and schedule recurring instances of a variety of employee management and Sage 100 Payroll Link processes and transfers.

This new functionality will eliminate the need to manually run recurring processes, allowing you to save time by automating work, and ensuring that your data is updated and current when you need it to be.

The Process Scheduler supports the following processes:

- Accrue Time
- Post Transactions to Summary
- Update Benefits
- Sage 100 Link - Employee Transfer
- Sage 100 Link - Pay History Transfer
- Sage 100 Link - Time Off Transfer

Additional processes will be supported in future releases.

Process Management Interface Enhancements

To further support the Process Scheduler, we have added several new features to the Process Management interface on the premium web version of Sage HRMS.

Process Report Access

You can now view reports associated with processes directly from the Process Management page. Hover over the report icon to view and open the list of associated reports.

Rerun Failed Processes

You can now rerun failed processes from the Process Management screen, without having to create a new unique instance of that process.

Once you have resolved any data issues, return to the Process Management screen and select the 'Rerun' icon to rerun the failed process.

Skip Scheduled Processes

You can also skip any upcoming Scheduled Process instances directly from this interface.

If you do not want an instance of a Scheduled Process to run, select the 'Skip' icon. The process will be omitted without any changes to the existing process schedule.

Frequently Used Pages

We have added a feature to track the pages you visit most frequently. A list of pages will be displayed by default, with the list updated to reflect your most frequently used pages as you work. The Frequently Used Pages menu can be reached by clicking on the star icon in the top menu bar.

HRMS Time Off Process Enhancements

We have added the following three additional HRMS Time Off Processes to the Processes menu:

- Delete Absence Transactions
- Reset Current Accrual Year
- Change Attendance Plans

DB Connect Tool Changes

Starting with Sage 300 2023 PU2, the password rules in Sage 300 have changed. This change impacts the Database Connection Tool for Sage 300 Standalone customers on Sage 300 2023 PU2 or later. In addition, all Standalone customers regardless of Sage 300 version that have changed their Admin password to include lowercase letters or special characters are also affected.

SAP Crystal Reports runtime engine

Starting with Q3 2023, the HRMS install will no longer install the 'SAP Crystal Reports runtime engine for .Net Framework (32-bit)' program for HR Only installs. The 'SAP Crystal Reports runtime engine' will continue to be installed for the HRMS Integrated product. If the 'SAP Crystal Reports runtime engine for .Net Framework (32-bit)' program has already been installed, it will not be uninstalled.

Crystal Reports 2020 is now available in Connected Services

Crystal Reports will now show up in Connected Services when installing the Original Equipment Manufacturer (OEM) version of Crystal Reports Designer 2020.

Vets 4212 Form

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

Quick Find

Fixed an issue where the Employee Quick Find was not working after running a crystal report.

Newly added custom fields not available in DDFLD table

Fixed an issue where new custom fields were not available in the DDFLD table.

Create Custom Menu

Fixed an issue where using single quotes in the Custom Menu name broke the menu. Single quotes are now ignored in the name.

Sage Branding Updates in the Desktop

The premium desktop version of Sage HRMS has been updated with the latest Sage branding theme. You will see changes to the Sage HRMS logon page as well as changes to the color scheme and product buttons and controls through-out the premium desktop product. The shortcut created when the Sage HRMS Client is installed, has also been updated to reflect the new branding. You will also see the new Sage HRMS icon in the product as well as in the system task bar (if added).

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
Vets 4212 Form Learn more	Yes	
Quick Find breaks Learn more	Yes	
DB Connect Tool Changes Learn more	Yes	
SAP Crystal Reports runtime engine Learn more	Yes	
Crystal Reports 2020 is now available in Connected Service Learn more	Yes	
Newly added custom fields not available in DDFLD table Learn more	Yes	

Vets 4212 Form

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

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Crystal Reports 2020 is now available in Connected Service

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Newly added custom fields not available in DDFLD table

Fixed an issue where new custom fields were not available in the DDFLD table.

My Workforce Analyzer updates

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

Sage 100 Payroll Link updates

We are excited to announce that the Sage 100 Payroll Link is now available in premium web version of Sage HRMS!

Customers can now perform all their setup and transfers tasks directly using the premium web version the Sage 100 Payroll Link. With these features available in the web, the Sage 100

Admin no longer has to be logged into the desktop version to transfer employee information between Sage HRMS and Sage 100 Payroll.

We have also enhanced all of Sage 100 Payroll Transfer processes by adding each process to the new Process Scheduler tool. This change gives you the ability to schedule recurring runs by different frequencies for each of the Sage 100 Payroll Transfer processes.

To support the premium web version, there are some changes to the configuration steps to connect Sage HRMS and Sage 100 Payroll. The installation of Sage 100 Payroll Link however must still be completed in the desktop version of Sage HRMS on the “Register Sage HRMS” page. In addition, you must still enter the “Sage 100 User Credentials” on the Register page as well.

This update includes new features and enhancements to both the desktop version and the premium web version of Sage 100 Payroll Link. Some updates have also been included in this release for the existing desktop version of the Sage 100 Payroll Link. Please review the table below to learn more about these changes.

Sage 100 Payroll Link Product Updates	Existing Desktop Sage 100 Payroll Link	Premium Desktop Sage 100 Payroll Link	Premium Web Sage 100 Payroll Link
Sage 100 Link Landing Page Learn more			Yes
Sage 100 Payroll Link Setup Pages Learn more			Yes
Sage 100 to HRMS Transfer Learn more			Yes
Sage 100 Payroll Link Setup - Transfer > Employees Learn more			Yes

Sage 100 Payroll Link Product Updates	Existing Desktop Sage 100 Payroll Link	Premium Desktop Sage 100 Payroll Link	Premium Web Sage 100 Payroll Link
Sage 100 Payroll Link Setup - Transfer > Time Off Learn more			Yes
Sage 100 Payroll Link Setup - Transfer > Pay History Learn more			Yes
Sage 100 Payroll Link Reports Learn More			Yes
Sage 100 Payroll Link Include Job Title in Transfer Learn more	Yes	Yes	Yes
Sage 100 Payroll Link Include Gender Identity in Transfer Learn more	Yes	Yes	Yes
Sage 100 Payroll Setup Learn More			Yes
Sage 100 Payroll Link Tax Profile message changes Learn more	Yes	Yes	Yes
Sage Branding Updates Learn more		Yes	

Sage 100 Payroll Link Landing Page

The Sage 100 Payroll Link Landing page is your one stop shop for all your Sage 100 Payroll Link setup and transfer functions. From the landing page, you can run each of your data transfers or select the Setup tab to complete all your HR and Payroll mapping tasks.

Sage 100 Payroll Link Setup Pages

You must map all the HR and Payroll codes using the Setup mapping pages before transferring data between Sage HRMS and Sage 100 Payroll. After mapping these codes in Sage 100 Payroll Link, you should review each of the Setup audit reports to ensure the accuracy of your information before proceeding with any of Sage 100 Payroll Transfer processes. All these reports are now available on one page in the premium web version of Sage 100 Payroll Link.

Sage 100 Payroll Link Employee Setup

You can use the Employee Setup process to initially populate your Sage HRMS system with Sage 100 Payroll employees. You must first map all appropriate values using the Setup mapping pages. The Employee Setup process should only be run once to initially populate your Sage HRMS system with employees. Transferring employees from Sage 100 Payroll to Sage HRMS more than once may result in employee data being overwritten.

Sage 100 Payroll Link Setup - Transfer > Employees

Use the Employee Transfer process to add new hires and update employee information in Sage 100 Payroll.

Sage 100 Payroll Link Setup - Transfer > Time Off

Use this process to transfer absence transactions from Sage 100 Payroll to Sage HRMS Time Off. The data transferred is based upon the Sage 100 Payroll earnings that are mapped to absence reason codes in Sage HRMS Time Off. You must also select the same Earnings Type when mapping employers. All setup steps can be completed in the web version of Sage 100 Payroll Link.

Sage 100 Payroll Link Setup - Transfer > Pay History

Use Sage 100 Payroll Link to transfer pay history from Sage 100 Payroll to Sage Employee Self Service (if installed). The same transfer options are available in the premium web version as the desktop. You have the option of running the transfer process to view the audit report only. You can also select a Check Date range and decide whether to Transfer Pay History Not Previously Transferred or Transfer All Pay History. You must also indicate whether you want to run the audit report when transferring the pay history information.

The Pay History Transfer process is only available if you have also purchased Sage HRMS Employee Self Service.

Sage 100 Payroll Link Reports

Setup Reports

The Sage 100 Payroll Link Reports are now available on demand on the Setup Reports page. After mapping the HR and Payroll codes in Sage 100 Payroll Link, you can now preview the reports to ensure the accuracy of your information before proceeding with any of Sage 100 Payroll Transfer processes.

Transfer Reports

When you transfer data from Sage HRMS to Sage 100 Payroll, the reports you select to review are now also all available on the Process Management page under the Process Log. Unlike the desktop version of Sage 100 Payroll Link, you can now conveniently access these reports after the transfer process has completed.

All reports can also be printed and saved for future reference.

Sage 100 Payroll Link Include Job Title in Transfer

All Sage HRMS job codes that are mapped to Sage 100 Payroll labor codes, will now also transfer the Sage HRMS Job Title. The value will be displayed on the Main tab of the Employee Maintenance page in Sage 100 Payroll.

Sage 100 Payroll Link Include Gender Identity in Transfer

The Gender Identity code in Sage HRMS will now automatically transfer to the Gender Identity field on the Additional tab of the Employee Maintenance page in Sage 100 Payroll. Sage HRMS and Sage 100 Payroll both share the following three Gender Identity Codes: Male, Female and Non-Binary

All shared Gender Identity codes (Male, Female and Non-Binary) between Sage HRMS and Sage 100 Payroll are automatically mapped and will transfer one to one. Gender Identity set to the default value of None Specified are transferred to Sage 100 Payroll as "Not Reported." All other Sage HRMS Gender Identity codes not mentioned will also map to this value in Sage 100.

Sage 100 Payroll Setup

The Sage 100 Payroll Setup (employee) detail page is also available in the premium web version of Sage 100 Payroll Link. The Sage 100 Payroll Setup page is available on the Job and Pay menu. Use the Sage 100 Payroll Setup page to enter payroll information that you want transferred to Sage 100 Payroll.

Note: To update the Employee Tax Info, you must do this in the desktop version of Sage HRMS. This feature will be available in a future release.

Sage 100 Payroll Link Tax Profile message changes

The message displayed on the Sage 100 Payroll Setup page when the employee record contains invalid data has been updated for clarity.

Sage Branding Updates

The new Sage Branding theme has also been applied to the desktop premium web version of Sage 100 Payroll Link.

How to choose the right product update

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

If you have this product:	You should Install:	Quarterly Version
Premium desktop version of Sage HRMS	SageAbraSQLHRMS10_706534.exe	10.70.65.34 - 2023 Q3
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.101001_premium_web_HRMS_ESS.exe	21.10.10.01 - 2023 Q3
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10_706534.exe	10.70.65.34 - 2023 Q3
Existing version of Sage HRMS Employee Self Service	There is no Sage HRMS Employee Self Service update.	No changes in Q3

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 HRMS Download Portal](#).
2. Click the appropriate download and log in if required.
3. 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.

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

You can review or change your customer account number in **Help > About Sage HRMS**.

Verifying the product update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > About Sage HRMS** and verifying that the version number matches the version of the update .exe file.

You can also verify the latest tax update is applied to your system by selecting **Payroll > Process Payroll > Calculate Payroll** and the **Tax Version** listed on the window should display the date: September 14, 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 with Sage ESS update installation instructions

After you have downloaded the premium version of the Sage HRMS Employee Self Service update from the Sage Knowledgebase, follow these instructions to install the update.

Before you start:

- Verify that Sage HRMS has been installed and is working correctly.
- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access Sage HRMS data.
- If you are using Sage HRMS Employee Self Service and/or Open Enrollment, make sure all enrollment periods are closed, and that all users have exited and logged off from Sage HRMS and Sage HRMS Employee Self Service.
- When the update is complete, you will be prompted to restart your system. Before you begin installing the update, make any necessary preparations for this required restart.

Downloading the update

1. Visit the [Sage HRMS Download Portal](#).
2. Click the appropriate download and log in if required.
3. 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.

Premium web version of Sage 100 Payroll Link Configuration

Upgrade Instructions

You must first upgrade the desktop version and the premium web version of Sage HRMS to the latest version and follow the steps below.

1. Configure a security group and user to access Sage 100 Payroll Link and the Sage 100 Payroll Setup (employee detail) page in the desktop version of Sage HRMS. This security user should be considered the “HRMS User” when configuring the user account for the premium web version of Sage HRMS.
2. Configure Sage 100 Payroll Location using the System Maintenance tool.
 - a. From the Start menu, select All Programs > Sage HRMS (Web Version) > System Maintenance.
 - b. Select the Sage 100 Setup tab. Click the ellipses button and browse to the location where Sage 100 is installed. This is a required step even if the Sage 100 Payroll Location has already been saved in previous configurations or installs.
3. Configure the HRMS User account in the web.
 - a. Logon to the premium web version of Sage HRMS as the Master user.
 - b. From the menu, select Roles and Logon > Logon Maintenance.
 - c. On the Logon Maintenance page, search for the employee who will be using the Sage 100 Payroll Link.
 - d. Click Go.
 - e. In the search results table, select the employee's name.

- f. Click the HRMS User dropdown and select the security user that has been setup with access to Sage 100 Payroll Link and Sage 100 Payroll Setup (employee detail) page.
 - g. Click Save.
4. Launch the desktop version of Sage 100 Payroll Link before accessing the web version of the Sage Payroll Link. This is a mandatory step to copy the mappings to the web.
 - a. Logon to the premium desktop version of Sage HRMS as the Sage 100 Payroll Link security user (HRMS User).
 - b. Select Connected Services > Integrations > Sage 100 Payroll Link.
 - c. Once the Sage 100 Payroll Link loads, your mappings are transferred and you can close the desktop version of Sage 100 Payroll Link.

Using the premium web version of Sage 100 Payroll Link

After completing the above configuration steps, the web version of Sage 100 Payroll Link is ready to use.