Sage HRMS

U.S. Payroll
Q3 SR 2023 Release Notes

October 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 Q3 SR 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

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
Updates to EEO-1 Reporting Learn more	Yes		
Payroll Custom Directory Issue Learn more	Yes		
Import Calculations not updating Pay Equity Job Code Learn more	Yes		
Sage 100 Payroll Setup Page added to Employee Tasks Learn more		Yes	
Import Calculations Reverts Manager Change on Current Job page Learn more		Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
About page updated in the web version of Sage HRMS Learn more		Yes	
Enhancements to waiving benefits in Employee Self Service Learn more			Yes
Time Off Duplicate Creation Issue Learn more			Yes
Process Taken Time Off Learn more			Yes

Updates to EEO-1 Reporting

The EEO-1 Headcount report has been updated to support the EEO-1 Component 1 Reporting for 2022. A new field called "Unique Entity ID" has been added to the EEO-1 tab of the HR Setup page to address the new requirements.

Payroll Custom Directory Issue

This applies to customers that have changed the Customization Directory on the Customization Directories page in Sage 300. Sage HRMS will no longer overwrite this value to the default directory when starting Sage HRMS.

Import Calculations not updating Pay Equity Job Code

Import Calculations and Job Code Setup have been updated so that all job related fields related to Job Code validation are updated on the employee. Job Code Validation must be set to "Yes" in HR Setup in order for the information to be updated.

Sage 100 Payroll Setup Page added to Employee Tasks

If Sage 100 Payroll Link is installed, the Sage 100 Payroll Link Setup page is now available on the following Employee Tasks pages.

- Add New Hire

- Rehire Employees

- Change Job and Pay

Import Calculations Reverts Manager Change on Current Job page

Changes to the employee's manager on the current job page in the web version of Sage HRMS are no longer reverted when running the Import Calculations process in the desktop.

About page updated in the web version of Sage HRMS

For HRMS users and the Master user, the About page has been updated to show the same information that appears in the desktop version of Sage HRMS.

Enhancements to waiving benefits in Employee Self Service

We have added an additional field to the Benefit Election setup wizard that allows administrators to choose whether each benefit will be transferred as zero dollar deductions on an employee's pay advice if the employee waives the plan during open enrollment.

> **Note:** You will want to transfer zero dollar deductions for benefits that need to be reported for the Affordable Care Act.

Additionally, we have added clarification for the employee when a plan is waived. The Benefit Summary page displayed during the open enrollment period will now denote waived plans by appending a "Waived Coverage" label to any applicable plans.

The Benefit Summary page will also include supplementary text informing the employee that the waived benefits may appear on the employee's pay advice as a zero deduction.

Time Off Duplicate Creation Issue

Fixed an issue where duplicate time off requests were displayed on the manager's time off calendar view. In addition, employees can now see all time off requests in the past when the Time Off setting - "Allow Past Time Off Requests" is set to "Yes."

Process Taken Time Off

Improved the performance on the Process Taken Time Off page.

Existing version of Sage HRMS and ESS product updates

This update includes changes to the existing version of both Sage HRMS and Sage HRMS Employee Self Service.

Product Updates	Existing HRMS	Existing ESS
Updates to EEO-1 Reporting Learn more	Yes	
Payroll Custom Directory Issue Learn more	Yes	
Import Calculations not updating Pay Equity Job Code Learn more	Yes	
Enhancements to waiving benefits in Employee Self Service Learn more		Yes
Update Namespace URL Learn more		Yes

Updates to EEO-1 Reporting

The EEO-1 Headcount report has been updated to support the EEO-1 Component 1 Reporting for 2022. A new field called "Unique Entity ID" has been added to the EEO-1 tab of the HR Setup page to address the new requirements.

Payroll Custom Directory Issue

This applies to customer that have changed the Customization Directory on the Customization Directories page in Sage 300. Sage HRMS will no longer overwrite this value to the default directory when starting Sage HRMS.

Import Calculations not updating Pay Equity Job Code

Import Calculations and Job Code Setup have been updated so that all job related fields related to Job Code validation are updated on the employee. Job Code Validation must be set to "Yes" in HR Setup in order for the information to be updated.

Enhancements to waiving benefits in Employee Self Service

We have added an additional field to the Benefit Election setup wizard that allows administrators to choose whether each benefit will be transferred as zero dollar deductions on an employee's pay advice if the employee waives the plan during open enrollment.

> **Note:** You will want to transfer zero dollar deductions for benefits that need to be reported for the Affordable Care Act.

Additionally, we have added clarification for the employee when a plan is waived. The Benefit Summary page displayed during the open enrollment period will now denote waived plans by appending a "Waived Coverage" label to any applicable plans.

The Benefit Summary page will also include supplementary text informing the employee that the waived benefits may appear on the employee's pay advice as a zero deduction.

Update Namespace URL

Namespace has been updated for single sign on interface web service to http://www.sage.com/ from http://www.bestsoftware.com/. If you are using the old namespace in your interface, please update to use the new one.

Sage 100 Payroll Link updates

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

How to choose the right product update

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

If you have this product:	You should Install:	Quarterly Version
Premium desktop version of Sage HRMS	SageAbraSQLHRMS10_706606.exe	10.70.66.06 - 2023 Q3 SR1
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.101101_premium_web_HRMS_ESS.exe	21.10.11.01 - 2023 Q3 SR1
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10_706606.exe	10.70.66.06 - 2023 Q3 SR1
Existing version of Sage HRMS Employee Self Service	SageHRMSESS10_705801.exe	10.70.58.01 - 2023 Q3 SR1

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.

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: October 19, 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.

System Recommendations for Sage HRMS and Sage HRMS Employee Self Service

The following changes have been made to the System Recommendations for all versions of Sage HRMS and Sage HRMS Employee Self Service:

As of Q3 SR 2023, Sage will no longer support Windows Server 2012 and 2012 R2. Microsoft ended support of these versions of Windows Server on October 10, 2023.

See Sage Knowledgebase article 225924250083549 for the current hardware and software recommendations for Sage HRMS and Sage HRMS Employee Self Service.