



Sage HRMS and Sage Employee Self Service

Release Notes

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Introduction

Release information

Product: Sage HRMS and Sage Employee Self Service

Version: 2017

About this version

This document describes enhancements and modifications in Sage HRMS version 2017 and Sage Employee Self Service version 2017 that differ from earlier versions. All customers who upgrade to this version should read these release notes to learn about changes to the software program.

Important! Before upgrading, consult with your business partner or Sage to ensure that this version is compatible with customizations, integrated third-party applications, and other configuration options. If you install this version independently, you assume responsibility for any impact on your system.

Before you install this version

Review the following information before you install:

- The [System Recommendations in Sage Knowledgebase article 83549](#), which includes the hardware and software recommendations.
- The [Sage HRMS Installation Guide](#).
- The [Sage Employee Self Service Installation and Setup Guide](#).

Note: You can find the latest documentation on the [Sage HRMS Product Documents website](#). This website is also linked from the Help menu in Sage HRMS.

Access the following installation packages by logging into the [Sage Knowledgebase](#):

- The Sage HRMS installation package ([Sage Knowledgebase article 83509](#)).
- The Sage Employee Self Service installation package ([Sage Knowledgebase article 83512](#)).
- SAP Crystal Reports version 2011 electronic download ([Sage Knowledgebase article 50162](#)).

Before you upgrade



- There are several procedures you must complete on your current system to prepare it for the upgrade. See the installation guides for Sage HRMS and Sage ESS for details. It is imperative you review the procedures before you install the upgrades.
- You must log on as a user with administrative privileges before you can upgrade a client workstation.
- If you use Sage HRMS Payroll, complete all payroll processing and print all payroll checks.

After you upgrade

- Make sure you have the latest payroll taxes. To install the latest tax updates, visit the Sage Knowledgebase at <https://support.na.sage.com> and search for the latest payroll update.
- Review your **Group Security** to make sure the new menu items are set to **Allow Access** for the appropriate users. The MASTER user automatically has access to all new functionality after the upgrade.

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!

- **Online Help:** Click  or press **F1** within in the product to open the online help for the window you are viewing. From within the help, you can click the **Contents** tab (on the left side of the window) to explore a variety of topics, click the **Index** tab to look for topics related to a particular keyword, or use the search box (in the upper right corner of the window) by typing a particular word or phrase and clicking  to search for topics containing that text.
- **Product Documents:** Access this and other documents from the [Sage HRMS Product Documents website](#).
- **Sage City:** Visit the online community at <http://sagecity.na.sage.com/> for blogs, tips, and guidance for your Sage programs.
- **Sage Knowledgebase:** Search the [Sage Knowledgebase](#), which provides 24/7 access to support articles as well as the latest software downloads and updates.
- **Customer Support:** For other support resources, visit the [Sage City Customer Resources page](#), select your country, and then select your product.
- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **Tax forms:** Because all printed forms have variations, Sage HRMS Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at www.SageChecks.com.

Human Resources

The following new features and improvements are included with this release.

Customizing the Sage HRMS Logon window

You can now customize the text that displays on the **Logon** window for Sage HRMS. To customize the text on the window, go to **Setup > System > Enterprise Setup** and click the **Customize Logon** tab. Enter a message for your Sage HRMS users that is no more than 254 characters and save.

Dependents and beneficiaries feature enhancements

The Dependents and beneficiaries features were enhanced so you can make updates while working on benefits plans or while updating employees. The enhancements include:

- **Assigning multiple beneficiaries and covered dependents at once.** You can now update multiple dependents or beneficiaries for an employee at once. Use the **Covered Dependents** or **Assign Beneficiaries** windows (**Employees > View/Edit Employee > Benefits > Insurance Benefits**) to assign and select more than one dependent or beneficiary at a time.
- **Adding beneficiaries while assigning plans.** You can now add new beneficiaries to your employees' plans while you are assigning insurance and savings plans in Sage HRMS. When adding plans to an employee, click the **Add** button in the beneficiary selection window, and complete the items to immediately add the beneficiary to the employee's plan. The beneficiary is then added to the employee's **Dependents and Beneficiaries**.
- **Adding dependents "on the fly."** You can now add a new dependent to an employee when you are viewing the employee's **Covered Dependent** window. Click the **Add** button and complete the items to add the dependent. The same information updates the employee's **Dependents and Beneficiaries**.

New context-sensitive web help

In addition to updating the context-sensitive help for Sage HRMS, it is now published to the web. You can use any browser to open web help for Sage HRMS. When you click a Help icon from any window in the program, the web help launches in a new tab of your browser or new browser window. Web help is published live and updated regularly at <http://help-hrms.na.sage.com>. If you or your Sage HRMS users do not have access to the Internet, you can still access the installed help from the program folders (**Program Files (x86) > Sage > Sage HRMS Client > Help**).

Sending emails to employees from demographics

You can now email an employee from the **Demographics** page, which contains the employee's email address. Click the **Mail** icon next to the employee's email address, and your default email program will open a new blank message with the employee's email address entered.

Job codes description (job title) length

The length of the **Job Codes Description** increased from 25 characters to 60 characters. This description displays as the **Job Title** on the employee detail page (**Employees > View/Edit Employee > Job and Pay > Current Job**). However, any reports that include the job code description displays only the first 25 characters.

Employee notes length

You can view up to 50 characters of notes for employees in the **Notes** column of the **Employee Notes Summary** window; (the previous limit was 21 characters).

Cross-employer transfer

We corrected an issue where some information from the **Employee Notes** from employees were not transferred with the **Cross Employer Transfer** process. The **Employee Notes** and all comments now transfer successfully. We also fixed an issue where the **Steps to Cross Employer Transfer Task** was updated for the original employer, when it should update the task for the new employer. (14290, 16942)

Using Copy Plan (to copy insurance plans)

Prior to this release, some customers received an error message when using the Copy Plan feature (**Setup > Employees > Benefits > Insurance Plans or Savings Plans**). You can now copy insurance and savings plans successfully.

Note: To copy employees and dependents from an old plan to a new plan, the employee (and dependent) enrollment dates for the plan you copy must fall within the new plan start and end dates. (17141, 17171)

Seniority level accruals carryover

Prior to this release, some customers experienced a problem with the maximum available and maximum carryover hours for employees with the seniority level of 10. Now, the correct time off accrual balances for employees with all seniority levels will be carried over. (16949)

Secure Query and CTRL+U

Prior to this release, some customers experienced an issue where the **Secure Query** settings would reset to the defaults when they used the **CTRL+U** keyboard shortcut to upgrade the database. Now, the Secure Query settings do not change when you use the keyboard shortcut. (16848)

Employee search

The "Search by ID or Name" field was removed from the Employee detail pages to address application stability issues (such as "Abra32.exe has stopped working" errors). (16952)

Updated sample data

The sample data (U.S. and Canadian employers and payroll companies) was updated to demonstrate the latest features available in Sage HRMS.

Sage HRMS Payroll

The following new features and improvements are included with this release.

Payroll upgrade

With this release, we upgraded:

- The payroll module version from 7.2 to 7.3.
- The supporting modules (Bank, System Manager, and General Ledger) from version 6.1 to 6.4.

The version upgrade creates new version-specific folders where your company data and files are stored.

If you customized the standard reports that come with Sage HRMS Payroll (such as the Bank Reconciliation or Chart of Accounts reports), your customized RPT files must be manually moved to maintain the customizations after upgrading. See [Sage Knowledgebase article 71417](#) for more information.

Caution! Standard reports in the Bank and General Ledger folders will be overwritten during the upgrade. If you customized Bank or General Ledger reports (saved to the `[Drive]:\ProgramData\Sage\SageHRMSServer\Payroll\CustomReports\GL61A\ENG` and `\BK61A\ENG` folders), you must save a copy of the RPT files to a safe location *before* installing the upgrade. After installation, you can add your customized RPT files to the **GL64A** and **BK64A** folders.

See the [Sage HRMS Installation Guide](#) for steps to move customized standard reports.

Deletion of multiple timecards in Timecard List

With this release, you now have the ability to delete multiple timecards at once in the **Timecard List** window (**Payroll > Process Payroll > Timecard List**). First use the filter criteria (Active, Inactive, by employee, etc.) to display the timecards you want to delete, and then click the **Delete All** button. Use this feature with caution, as all timecards shown in the filtered list will be deleted when you click **Delete All**.

G/L override for earnings and deductions

You can now use the **Cost Center Override** feature to update earnings and deductions in payroll with changes you make to related General Ledger codes. For example, if you add a new G/L segment code or change an Org Level (mapped to a cost center), you can use the **Payroll > Process Payroll > Open Payroll** process to include the changes in each earning, deduction, and tax in payroll. To use the feature, after you select the Profile ID on the **Open Payroll** window, click **Advanced Options**, and select **Overwrite Cost Center Overrides**. Then, when you click **Process**, the system updates any applicable G/L segments for the employees' earnings and deductions.

Note: Before you can start using the **Cost Center Overrides** feature, you must select the **Use Cost Center Overrides** check box on the **Integration** tab of the **Setup > Payroll > Payroll G/L Integration** window and set up the employees' G/L segments. After selecting the check box, you can define the nature of the overrides on the **Segments** tab of the same setup window. See the "[Using Cost Center Overrides](#)" help topic to learn more.

Number of active employees

On the **Company** tab of the **Setup > Payroll > Options** window, the new **Active Employees** item displays the number of employees whose status is Active. The employee status is specified on the **Class/Schd** tab of the **Employee Payroll** window.

Taxes for advances

When setting up an advance in the **Earnings/Deductions Codes** setup window, the **Employee** tab contains the **Subject to the Following Taxes** item is now available, which enables you to specify the taxes that the earning/deduction is subject to.

Note: Taxes for advances and repayment deductions are calculated differently than they were in previous versions. To ensure that taxes are calculated correctly for a taxable advance (and the corresponding repayment), ensure that you specify the same taxes in the **Subject to the Following Taxes** item for both the advance and the corresponding repayment deduction.

Service class codes

On the **EFT Options** window (**Setup > Payroll > EFT Options**), you can now change the service class code.

Withholding cap for Tax Bracket Table calculation method

On the **Basic Info** tab of the **Local/Other Tax Codes** setup window, if you specify **Tax Bracket Table** as the employee calculation method, you can now specify an annual maximum withholding amount on the **Employee** tab.

Employees consent to receive only electronic W-2 forms (U.S. Payroll)

On the **Class/Schd** tab of the **Employee Payroll** window, you can use the new **Employee Consents to Receive Only Electronic W-2s** option to indicate if an employee has provided consent to receive their W-2s only in electronic form.

T4A file for CRA (Canadian Payroll)

The new **T4As** and **T4As Electronic Filing** windows enable you to produce T4As, either as printed forms or files that you can submit to the Canada Revenue Agency (CRA) electronically.

Sage Employee Self Service

The following new features and improvements are included with this release.

Customizable logon reset message

The **Logon Setup** page contains the new **Logon Reset Message** custom message so administrators specify the text seen by employees who have trouble resetting their passwords or forget their user names. Also, the “Forgot Your Password?” link on the **Logon** page was changed to “Username and Password Help.”

After an unsuccessful attempt to reset the password or retrieve the username, your employees see the custom reset message. We recommend you customize the message to add contact information for administrators at your company who can help the employees with their logons.

New context-sensitive web help

In addition to updating the context-sensitive help for Sage Employee Self Service, it is now published to the web. You can use any browser to open web help for Sage Employee Self Service. When you click a Help icon from any window in the program, the web help launches in a new tab of your browser or new browser window. Web help is published live and updated regularly at <http://help-hrms.na.sage.com/ESS/>.

Processing open enrollments in groups

Administrators can now process open enrollments in groups, view processed open enrollments, and specify rollout dates on the **Sage Employee Self Service > Benefit Updates > Process Enrollment** page. When you're ready to Process Enrollments, use the search (which now includes All, Employee Last Name, and Organization Level options) to show groups of employees that were set up in Sage HRMS. When the page displays the employees (by last name or group) that you want to process, enter the rollout date when this group of employees' open enrollment period starts, then click the **Save** button to process the open enrollments and notify the employees.

Tip: View the "Process Enrollment" help topic for step-by-step instructions for this new feature.

Instructions for the Create New Logon page

The **Instructions** panel now contains detailed information for using the **Create New Logon** page. You must have access to this page to view the instructions. The information includes formatting and field requirements for fields on the page to help guide you through the process.

Create Custom Menu feature enhancements

You can now use the **Create Custom Menu** feature to add parent-level menu items and links to custom sites to the menu items. New menus you create are added to the bottom of the lists in existing menus. The order in which the menus appear cannot be changed at this time.

Employee photos

Administrators in Sage Employee Self Service can now see employee photos (if added) when viewing the **Company Phone List** and **Direct Reports Organization** pages.

Time off requests statuses in notifications

With this release, the email notifications now include the **status** of the time off request. This information is helpful, especially for requests edited by your employees (if you have the functionality enabled). The notifications now identify if the *original* time off request is **pending**, **approved**, or **rejected** in the subject line of the email. If an existing time off request was edited, the nature of the edit is also included in the notification.

Processing time off

Prior to this release, if an employee requested time off in Sage Employee Self Service and entered the word "FROM" in capital letters in the notes, some customers could not process the time off request. We corrected this issue. (17143)

Sage Integrations and Services

The following new features and improvements are included with this release.

Sage 100 Link and ZIP codes

With this release, Sage 100 Link now successfully transfers the entire employee ZIP Code, including the additional 4 digits (ZIP+4 Code), if entered for the employee in Sage HRMS.

Sage 100 Standard Link reports

With this release, you can now print any of the Sage 100 Standard Link reports from the Preview mode using a PDF printer or any other printer services installed on your computer.