Sage HRMS 2016

Installation Guide

December 2015

Contents

Introduction

Read all chapters in this guide before you install Sage HRMS. This guide provides instructions for installing Sage HRMS 2016 for the first time, upgrading Sage HRMS from prior versions, and upgrading to Sage HRMS from Sage Abra Suite.

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 and Sage Employee Self Service.

  - Open your Sage program and click the help icon to launch the help window.

  - Visit the Sage HRMS Product Documentation website or search the Knowledgebase for the latest guides.

- **Customer Support**. For additional articles and resources, visit https://support.na.sage.com or contact Customer Support at 800-829-0170 from within the U.S. and 800-330-2607 from Canada. Please have your Sage Customer Number handy when contacting Customer Support.

- **Tax forms**. Because all printed forms have variations, Sage HRMS 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.

System requirements

The Hardware and Software requirements for Sage HRMS 2016 are available on the Sage Knowledgebase (https://support.na.sage.com) under article ID 68933 (you must log in to the Knowledgebase to see the requirements).

Before you start

Make sure you have the following items before you begin a new installation or an upgrade:

- Sage HRMS 2016 installation package

- SAP Crystal Reports® 2011 installation package

- Sage HRMS 2016 Installation Guide (this document)

- Sage HRMS 2016 release notes (if you are upgrading from a prior version)

You can collect all of the supporting documents from the Sage HRMS Product Documentation website and download the installation package from the Sage Knowledgebase.

> **Important!** We recommend that you have Sage HRMS installed by a certified business partner or the Sage Professional Services Group.

Installing Sage HRMS Payroll for Sage 300

If you are installing Sage HRMS Payroll, be advised that Sage 300 Project and Job Costing and Sage HRMS Payroll client cannot reside on the same server. Before you start the installation, make sure that Sage 300 Project and Job Costing is not on the same server where you install Sage HRMS Payroll. We recommend you use virtual workstations for the client instances of Sage HRMS.

> **Note:** When Sage HRMS 2016 is installed without Sage HRMS Payroll, the program supports integration with Sage 300 Project and Job Costing. The tool that facilitates this integration is called AHLink.

Database Create credentials

Installation requires Database Create credentials. For the installation, the SQL account to be used during the installation must have full DB Create (administrative) credentials, such as username SA (System Administrator) and the password. If the Enterprise SQL DB Administrator will not provide an account with DB Create credentials, do the following:

- Have the Enterprise SQL DB Administrator create a SQL account especially for the Sage HRMS database and give that account name to the install team.

- After the install have the Enterprise SQL DB Administrator downgrade this account to DB Owner credentials only. Be advised that the account used during installation is the same account and password that will be used by the Sage HRMS application. To test this account and password combination, refer to the Database Connection Tool instructions.

Only alphanumeric characters are permitted on install screens: When you enter text in fields on the installation screens (such as company name or server name), the text must contain only alpha or numeric characters (alphabetic characters a-z, A-Z and numeric characters 0-9). You must not use any spaces or special characters, such as #, -, @ or punctuation marks.

Chapter 1: Installing Sage HRMS

This chapter provides instructions to install Sage HRMS for the first time. To familiarize yourself with the process, be sure to read all the steps before you start the installation. If you are upgrading from a previous version of Sage HRMS, skip to the appropriate upgrade chapter of this guide.

The installation of Sage HRMS consists of two separate installations: installing on the server and installing on clients.

Follow the steps below to first install Sage HRMS on a server, and then install a client either on the same server machine or on a separate machine. If you will run Sage HRMS on a network, the first user to log on each machine must do a separate client install.

Step 1: Install Sage HRMS on the server

> **Note:** You must have administrator privileges to install this product.

1. At the server machine, open the Sage HRMS installation package.

   ○ If you are using Sage HRMS with Microsoft SQL Server® 2008, SQL Server® 2008 R2, SQL Server® 2012 (Standard or Enterprise Editions), SQL Server® 2012 R2, or SQL Server® 2014 (Standard) and the SQL Server is installed, proceed to number 6 below.

   ○ If you do not already have SQL Server Express Edition installed, proceed to number 2.

   > **Note:** SQL Server Express Edition is a free download from Microsoft, but we recommend you have no more than 500 employees if using this edition. The Profiler feature is not available in this edition.

2. Visit www.microsoft.com and use the search to find SQL Server Express (a free download).

3. Once you have the download file saved to your server, access it locally (not from the network), right-click the **SQLEXPR*.exe** file, and select to Run as administrator.

4. Select Install SQL Server Express Edition and proceed with the installation. The system checks for, and if necessary, installs prerequisites for installation (such as Windows Installer, .NET Framework, and MDAC 2.8) before it begins installing SQL Server Express edition.

5. When the SQL Server Express Edition installation is complete, restart your server.

6. Open the Sage HRMS installation package from Sage, right-click the **setup.exe** file, and choose Run as administrator.

   If you receive a prompt regarding which account to use to run the program, clear the check box next to **Run this program with restricted access** and click **OK**.

> **Important!** You must save this installation package unzipped to a location where it cannot be deleted. This is key for your quarterly and future product updates.

7. Click **Next** when the Sage HRMS Installer welcome window opens.

8. Review the Sage End User License Agreement in the License Agreement window, accept the terms, and click **Next**.

9. Enter your **User Name** and **Organization** on the Customer Information window, and click **Next**.

10. Click **Next** to accept the default destination folder where the Sage HRMS Server will be installed; otherwise click **Change** and select another destination.

11. Enter the required information in the SQL Setup window. As you enter information, note the following:

   - **Server, User, Password**

     o If you are using SQL Server Express, enter `<SQLServerName\Instance Name>` for the Server Name, then enter sa in the User Name field and the password for the sa account in the Password field.

     o If you are using SQL Server, enter the `<SQLServerName>`, User Name, and Password in the corresponding fields. The SQL Server logon must be included in the administrator group.

     o Do not use localhost for the server name if you plan to install remote clients.

   - **Databases**

     o Periods are not permitted in database names.

     o Database names cannot have more than 14 characters.

     o The databases displayed are the default SQL databases that are installed. **SageHRMS_ Live** and **SageHRMS_System** are both required.

     o Optionally, the sample databases can be installed. Sample data allows you to practice in the system using data from a simulated company. It does not affect your live company data.

12. Select the **Install Sample Data** check box if you want to include sample data with your installation. Three sets of sample data are installed:

   o **Sample Database** is the sample HR database.

   o **Sample Payroll Database** is the sample U.S. Payroll database.

   o **Sample Canadian Payroll Database** is the sample Canadian Payroll database.

> **Note:** When you select the **Install Sample Data** check box, the system installs all three sets of sample data, regardless of your configuration. An advantage of having access to all three sets of sample data includes access to the Help for each configuration. You can also practice complex processes in the sample data before trying it out on your real data.

13. Click **Next** to establish a connection with the server.

    ○ If you receive a message that the server name, user name, or password are invalid, verify that your entries are correct.

    ○ If you are installing for SQL Server Express and you did not restart your system before installing Sage HRMS, restart your server, and begin the Sage HRMS installation again.

14. Use the **Ready to Install the Program** window to verify your settings are correct, then click **Install**.

15. When the server installation is complete, click **Finish** on the **Install Completed** window.

16. If prompted, restart your system.

17. From Windows Explorer, go to the destination folder where you installed the server (the default location is C:\ProgramData\Sage\SageHRMSServer), and set your sharing settings as follows:

    a. Right-click the SageHRMSServer folder and select Properties.

    b. Click the **Sharing** tab and Share the folder. You may be required to click the **Advanced Sharing** button to proceed depending on your system. Set the Permissions for users who access Sage HRMS over the network on the shared folder to Allow Full Control.

    c. Make sure the folder's **Share Name** does not contain a space. For example, use "SageHRMSServer" as a share name instead of Sage HRMS Server.

18. Click **Apply** and then **OK** to close.

Step 2: Enable Server Protocols and the SQL Browser Service

Before you install a client, to ensure the SQL Server is properly set up, you must enable proper protocols on the server and enable the SQL Browser Service.

To enable Server Protocols

1. Open the **SQL Server Configuration Manager**. Depending on your Microsoft SQL Server version (2008, 2012, or 2014), this may be from the Start menu > All Programs > Microsoft SQL

Server > Configuration Tools > SQL Server Configuration Manager.

2. From the left panel, expand **SQL Server Network Configuration** and **SQL Native Client Configuration**.

3. Click Protocols/Client Protocols.

4. Set the Shared Memory, TCP/IP, and Named Pipes protocols to Enabled. For the purpose of client installs, the status of the VIA protocol does not matter.

To enable the SQL Browser Service

1. From the **SQL Server Configuration Manager**, select SQL Server Services.

2. From the left panel, highlight **SQL Server Service**.

3. Verify the Service name SQL Server (MSSQLSERVER) **Startup type** field is set to Automatic and that **Service status** field is Running. If it is not running, you must Start the service.

4. Select All Programs > Administrative Tools>Services.

5. Highlight SQL Server Browser.

6. Change the **Startup type** from Disabled to Automatic and click **Apply**.

7. Under SQL Server Services, select and Start the SQLBrowser service.

8. Click **OK** to close the window.

9. Go to All Programs > Administrative Tools > Computer Management to open the **Computer Management** window.

10. From the **Services and Applications** section, select Services and scroll to the SQL Server entries.

11. Verify that both the **SQL Server** and **SQL Server Browser** services are set to Started and Automatic.

12. **Close** the Computer Management window.

Step 3: Install the Sage HRMS client

If you are operating Sage HRMS on the server machine, you must also install a client on that server machine. Additionally, client installs only need to be done for the first install of Sage HRMS client.

Before installing the client

Administrator privileges are required to install these components. If you are not a member of the administrators group and you are installing on Windows 7, Windows 8 (and 8.1), Windows 10, Windows Server 2008 (and R2), or Windows Server 2012 (and R2), you will be required to enter an administrator user account and password before you can continue.

> **Important!** You must have installed Microsoft .NET Framework 4.5.2 or higher prior to installing Sage HRMS on the client. Your standard MS Windows updates should install .NET 4.5.2 but we recommend you verify your .NET version before beginning the installation.

To install the Sage HRMS client

1. If you are installing a client on the server machine, you can start the client installation using the shortcut **Sage HRMS Client Install** placed on the desktop from the server installation.

    Or, at the client machine, go to the shared folder on the server (either by using a UNC path or by creating a mapped drive). From the Client folder, right-click the **setup.exe** file, and select to Run as administrator.

2. The Windows Installer and client installation begins. If a required component is not found on your machine, a window lists the missing required components.

3. Click **Install** to start installing the required components.

4. If prompted to restart your computer, restart immediately and not later.

5. After restarting, the Sage HRMS **Client Install Welcome** window opens. Click **Next** to continue with the client installation.

6. If you are using Sage HRMS Payroll (U.S., Canadian, or both), follow the prompts to install the payroll modules and restart Sage HRMS when finished.

    > **Note:** The payroll module requires administrator privileges to install.

7. When prompted, select the **Launch** Sage HRMS **Client** check box and click **Finish**.

8. When prompted, register your software and enter the **Serial Number** and **Installation Code** provided by Sage when you purchased the product. Registration is required only on the first client installation.

9. If you want to add the Sage 100 Standard Link, Sage 100 Advanced ERP G/L Link, Sage 500 ERP G/L Link, or Sage X3 G/L, select the associated check boxes and click **OK**.

10. Click **OK** to update your files and restart again if prompted. The Sage HRMS **Logon** window appears when the file update and restart are complete.

Step 4: Install SAP Crystal Reports®

SAP Crystal Reports® Designer

SAP Crystal Reports® 2011 Designer is provided as a component of Sage HRMS2016. The Designer version provides the option to create, modify, and use custom and ad hoc reports in Sage HRMS. Without installing this additional component, you can still view and print standard reports in Sage HRMS but you cannot modify them.

Installing SAP Crystal Reports® 2011

To install SAP Crystal Reports®, visit the Knowledgebase (https://support.na.sage.com) and search for Article ID 50162. Follow the steps in the article to download and install the program.

Chapter 2: Upgrading Sage HRMS

This chapter walks you through upgrading your Sage HRMS 2015 to Sage HRMS 2016. To familiarize yourself with the process and make sure you have everything you need for a successful upgrade, please read all the steps before you start them.

> **Important!** If you are upgrading from a version of Sage HRMS other than the latest release of Sage HRMS 2015, please contact Sage HRMS Customer Support at 800-829-0170 from within the U.S. or 800-330-2607 from Canada for assistance.

Before you start

Before you begin the upgrade, complete all payroll processing and print your payroll checks.

> **Important!** You must have installed Microsoft .NET Framework 4.5.2 or higher prior to installing Sage HRMS on the client. Your standard MS Windows updates should install .NET 4.5.2 but we recommend you verify your .NET version before beginning the installation.

Step 1: Upgrade the server

You must have administrator privileges to install this upgrade.

> **Note:** Sample data is always overwritten during an upgrade. Live data is never overwritten.

1. Back up your data.

2. At the server machine, open the Sage HRMS installation package, right-click the **setup.exe** file, and choose Run as administrator.

3. When the Sage HRMS Installer opens, click **Install** Sage HRMS. The Preparing to Install window opens and the server upgrade process begins.

   If you receive a prompt regarding which account to use to run the program, clear the check box next to **Run this program with restricted access** and click **OK**.

4. Click **Next** when the Sage HRMS Installer welcome window opens.

5. The installation starts and the progress bar displays during the installation. Follow the prompts to accept the terms and proceed with installation.

6. When the server installation is complete, click **Finish** on the **Install Completed** window.

7. If prompted, restart your system.

Step 2: Upgrade the client

You must be logged in as a user with administrator privileges before upgrading the clients. For each remote client machine accessing Sage HRMS, do the following:

1. At the client machine, select Start > All Programs > Sage > Sage HRMS Client > Sage HRMS Client.

   > **Note:** If you have not already installed Microsoft .NET Framework 4.5.2, it will automatically install with the client.

2. When a message prompts you to perform the Client upgrade, click **Yes**.

3. When the client upgrade is complete, you will be prompted to restart Sage HRMS before proceeding.

If You Are Not Installing Sage HRMS Payroll

4. The Update window opens after clicking **Finish**. Click **OK** to update your files.

5. When file update is complete, the Sage HRMS Logon window appears.

6. Select Use Windows Logon if you are using Windows authentication to log on. Otherwise, enter a user name and password and click **Logon**.

7. Click **OK** when prompted to update your files.

8. Installation is now complete for non-payroll systems.

If You Are Installing Sage HRMS Payroll

4. The payroll modules window opens after you click **Finish**. Click **Yes** to install the payroll modules (you must have administrator privileges).

5. When the payroll modules installation is complete, the Update window opens. Click **OK** to update your files.

6. Sage HRMS is launched, the files are updated, and the Logon window appears.

Step 3: Install SAP Crystal Reports® 2011

SAP Crystal Reports® Designer

SAP Crystal Reports® 2011 Designer is provided as a component of Sage HRMS2016. The Designer version provides the option to create, modify, and use custom and ad hoc reports in Sage HRMS.

Without installing this additional component, you can still view and print standard reports in Sage HRMS but you cannot modify them.

Installing SAP Crystal Reports® 2011

To install SAP Crystal Reports®, visit the Knowledgebase (https://support.na.sage.com) and search for Article ID 50162. Follow the steps in the article to download and install the program.

> **Note:** SAP Crystal Reports® Designer version 2008 (provided with Sage HRMS 2014) is not supported with Sage HRMS 2016.

After upgrading

If you have custom applications you must designate their location. Follow the steps below to use the Abrawin.ini file to locate the custom applications.

1. On the server machine, create a folder where your custom or third-party applications will be located.

2. Install your custom or third-party applications into this folder.

3. Open the **Abrawin.ini** file (located in the \SageHRMSServer folder) and add a **[Sage HRMS]** section that designates the path to the custom applications folder.

   For example, the following two lines added to the **Abrawin.ini** file will direct Sage HRMS to search the Third Party Apps folder for the custom applications installed in the folder. (Sage HRMS will search only in the root path, not in sub-folders.)

   ```
   [Sage HRMS]CustomApps = C:\Sage HRMS\Third Party Apps\
   ```

Chapter 3: Converting from Sage Abra Suite

This chapter discusses the procedures for converting your HR-only Visual FoxPro database in Sage Abra Suite to SQL Server database in Sage HRMS. Only Sage Abra Suite version 9.2 can be converted to Sage HRMS 2015. Once Sage HRMS 2015is installed, you can upgrade to Sage HRMS 2016.

> **Important!** Due to the complexity of converting your Sage Abra Suite data to Sage HRMS, it is critical that you get help from Sage HRMS Professional Services Group or your certified business partner with this process. Customer Support cannot assist with this conversion process. If you attempt this process without help from a certified consultant or Sage Professional Services Group (PSG), it is outside of the scope of supported installations.

The conversion procedures consist of installing Sage HRMS, converting your existing Sage Abra Suite Visual FoxPro data to Sage HRMS SQL Server data, and changing the data source for custom reports from Abra Data Access to Sage HRMS Data Access.

To convert from Sage Abra Suite version 9.2

> You must have administrator rights to install this upgrade and perform the conversion.

1. Install Sage HRMS. See Installing Sage HRMS.

    - You must install the server as well as all remote clients.

    - You can install Sage HRMS on the same server machine as your Sage Abra Suite version (this is called a side-by-side).

2. When server and client installations are complete, you must now upsize your data. This converts your HR-only database from Visual FoxPro to SQL Server. See Using the Upsize Wizards for FoxPro to SQL Server Conversion .

3. If you are using Abra Link or custom Visual FoxPro databases (such as for third-party applications), you must now upsize your Abra Link and custom data. See Using the Upsize Wizards for FoxPro to SQL Server Conversion .

4. If you created custom reports in Sage Abra Suite, you must update the reporting data source from Sage Abra Suite Data Access to Sage HRMS Data Access. See Upsizing Sage Abra Suite Custom Reports.

Upsizing FoxPro database to SQL Server

The Sage HRMS Data Upsizing Wizard converts an HR and Time Off-only Sage Abra Suite (Visual FoxPro) database to a SQL Server or SQL Server Express Edition database. If your system includes Sage Abra Suite Payroll, the Upsize Wizard updates the payroll data for archival purposes and the data cannot be used "as is" in Sage HRMS Payroll. Contact Sage HRMS Professional Services Group or your certified business partner for assistance with converting your payroll database to Sage HRMS.

Database structure changes

When you run the Data Upsizing Wizard, the structure of the database changes as follows:

- An integer type field named ID_Col is added to all tables that are automatically populated. The field value increments by one each time a new record is added.

- All date types are converted to date/time types.

- To avoid conflict with T-SQL, all field names that are T-SQL-reserved words (desc, rule, table, and group), are converted to fdesc, frule, ftable, and fgroup.

When upsizing to a SQL Server or SQL Server Express database:

- The Custom Details tables in the custom folder (such as TKSCREEN.DBF and TKTABLES.DBF) are added to the database.

- If any errors occur during the upsize, a message is displayed when the upsize is finished.

- If the table already exists in the target database, it is dropped and upsized again.

The table below shows the data type conversions from Visual Fox Pro to SQL Server.

VFP data type	SQL Server data type
character	char
numeric	float
integer	int
date	date/time (All empty dates are converted to NULLs)
logical	bit
memo	text
general	image

To run the Data Upsizing Wizard

1. Contact Sage HRMS Customer Support to request the Data Upsizing Wizard application.

2. Once you have the **.exe** file, right-click and Run as Administrator to launch the Upsizing Wizard.

3. Select SQL Server as the database destination.

4. In the **Database folder to upsize from** field, select the location of the database folder you want to convert.

5. In the **Temporary working folder** field, select the location of the folder to use for the intermediary files needed during the conversion. The default is **C:\Temp\UpsizeWiz**.

6. Enter the following information and then click **Test SQL Connection** to make sure the connection is valid. Note that the defaults display as a result of the installation, but you can change them if necessary.

    ○ **Server.** This is stored in the Abrawin.ini file.

    ○ **Database name.** This is the Live database name stored in the Abrawin.ini file.

    ○ **User ID.** This is stored in the DBAccount.ini file.

    ○ **Password.** This is stored in the DBAccount.ini file and is displayed as asterisks.

    ○ Select the **Photo Settings** tab and set the location for your employee photos.

7. Click **Start** to begin the upsize process. The progress of the data upsizing is conveyed by two status bars. The first one represents the specific table being converted; the second one represents all tables in the database being converted.

8. When upsizing is complete, click **OK**.

Upsizing Sage Abra Suite custom reports

This section applies to custom reports created with Sage Abra Suite. When you upgrade to Sage HRMS, you must change the data source for each report and save it to a new folder.

Before you upsize reports

- You must have Sage HRMS and SAP Crystal Reports® 2011 installed.

  SAP Crystal Reports® 2011 Designer is provided as a component of Sage HRMS 2016. The Designer version provides the option to create, modify, and use custom and ad hoc reports in Sage HRMS. Without installing this additional component, you can still view and print standard reports in Sage HRMS but you cannot modify them.

  To install SAP Crystal Reports®, visit the Knowledgebase (https://support.na.sage.com) and search for article ID 50162. Follow the steps in the article to download and install the program.

- You must have already used the Data Upsizing Wizard to upsize your HR and Time Off data.

Changing the data source

1. Log on to Sage HRMS. You must also log on to Sage Abra Suite, because the data source in the reports you are upgrading still references the ADA (Abra Data Access).

2. From the Sage HRMS Connected Services > Sage HRMS Tools menu, select Crystal Reports to launch SAP Crystal Reports®. The Welcome to Crystal Reports window opens.

3. Open one of your custom reports.

4. From the SAP Crystal Reports® main menu, select Database > Set Datasource Location. The **Set Datasource Location** window opens.

   > **Note:** If Sage HRMS Data Access has been created under OLE DB (ADO), select Sage HRMS Data Access, and click **Update**. Repeat for subreports if needed. If a field name has changed, proceed to the Field Name Changes section of this document.

5. In the **Replace With** section, click the plus sign to expand **Create New Connection**.

6. Click the plus sign to expand OLE DB (ADO).

7. Double-click Make New Connection.

8. The OLE DB (ADO) window opens. Click once to highlight Sage HRMS Data Access (OLE DB Provider).

9. Click **Finish**. The **Set Datasource Location** window opens.

10. In the **Replace With** section, click once to highlight Sage HRMS Data Access.

11. In the **Current Data Source** section, click once to highlight **Abra Data Access**.

12. Click **Update** to update the old Sage Abra Suite data source with the new Sage HRMS data source.

> **Note:** In the top section, you must select the data source to change *from*, and in the bottom section you must select the data source to change *to* before you **Update**.

13. In the **Create New Connection/OLE DB** folder, right-click Sage HRMS Data Access and select Add to Favorites.

14. Repeat Steps 3 through 13 for each custom report and subreport. Depending on the complexity of your report, you may also need to change field names that are T-SQL reserved words, such as desc, rule, table, and group, and check for empty dates.

Field name changes

In order to continue using your SAP Crystal Reports® custom reports, you must change the field name for all fields that conflict with keywords in T-SQL. The new fields are named the same as the old, but with an F prefix. The table below shows the field name changes in the Sage HRMS database.

Table	Sage HRMS field name	T-SQL reserved word
HBEPLAN	FDESC	DESC
SYREPORT	FGROUP	GROUP
SYSCHED	FDESC	DESC
HRTABLES	FDESC	DESC
HRTABLES	FRULE	RULE
HRTABLES	FTABLE	TABLE
TKTABLES	FDESC	DESC
GENEMAIL	FDESC	DESC
OEBEPLAN	FDESC	DESC

If your report requires field name changes, when you update the data source the **Map Fields** window opens.

1. Click once to highlight the old field name in the **Unmapped Fields** section. In the right box, click once to highlight the new field name. For example, if your report uses desc, select `desc` in the left box and `fdesc` in the right box.

2. Click **Map**.

3. Preview the report. If you receive a message stating that one or more database tables have changed, click **OK**.

Checking for empty dates

In Sage HRMS, all date fields without a specific date assigned are now **NULL**. If you have any reports in which you check for an empty date in a selection formula using the `EMPTY()` function, you need to now use the `ISNULL()` function. The example below shows selecting benefit records in the HBENE table.

Before: `{hbene.b_beneid} in ["S", "I"] and {hrpersnl.p_active} = "A" and (EMPTY({hbene.b_expdate}) or {hbene.b_expdate} > CurrentDate)`

After: `{hbene.b_beneid} in ["S", "I"] and {hrpersnl.p_active} = "A" and (ISNULL({hbene.b_expdate}) or {hbene.b_expdate} > CurrentDate)`

Chapter 4: Uninstalling Sage HRMS 2016

To completely uninstall Sage HRMS 2016, you must uninstall the clients and the server. If your system includes Sage HRMS Payroll, there are several modules that will also be uninstalled with the process.

Below is a list of the programs that are installed for an HR/Payroll system. Only the first two programs, Sage HRMS Client and Sage HRMS Server, are installed for both HR and Payroll. The remaining programs are the payroll modules.

- Sage HRMS Client

- Sage HRMS Server

- Sage HRMS Payroll Bank Module

- Sage HRMS Payroll General Ledger Module

- Sage HRMS Payroll Sync

- Sage HRMS Payroll System Manager

- Sage HRMS Payroll (U.S. or Canadian) Payroll Module

- Sage HRMS Payroll (U.S. or Canadian) Tax Module

To uninstall Sage HRMS, remove the programs in the order listed. You can only use the **Add/Remove Programs** function to uninstall the Sage HRMS application. You cannot use setup.exe to uninstall. You must have administrator privileges to uninstall.

To uninstall Sage HRMS

1. Go to **Add/Remove Programs** (from the Control Panel, depending on your operating system).

2. Remove Sage HRMS Client.

   > **Note:** When the client is uninstalled, all Sage HRMS Payroll modules are also automatically uninstalled.

3. Remove Sage HRMS Server.

4. Repeat steps 2 and 3 for all applicable programs in the order listed above.

Appendix

Verifying database connections

Use the **Database Connection Tool** to:

- Verify an existing database connection.

- Change existing information in order to establish a connection with a different server if you move your Sage HRMS database.

To use the Database Connection Tool

1. From the Start menu on the server, select All Programs > Sage > Sage HRMS Server > Database Connection Tool.

2. In the **Database Connection Tool** window, enter your server name, user ID, and password. You must provide a SQL Server logon that has been given administrator privileges.

3. Enter the names of your Live Database and Sample Database, and if you are using Payroll, the Payroll System Database and Payroll Sample Database. If you are using Payroll, enter the User ID and Password for the payroll link.

4. Click **Test Connections** to test for valid connections to the databases.

   - If all connections are successful, the test results display "Successful".

   - If you receive a message that the connections failed, verify your entries are correct.

5. Click **OK** to return to the Database Connection Tool window and click **Save** to establish your database connections.

Re-registering Sage HRMS to add a module or option

If you have an existing Sage HRMS system and want to add another module or option, simply re-register Sage HRMS.

If you are adding U.S. Payroll or Canadian Payroll you must set up the payroll database. For more information, refer to the Sage HRMS Payroll Getting Started Guide.

- Changing the serial number or installation code requires you restart Sage HRMS.

- If you add U.S. Payroll to a Canadian Payroll system or add Canadian Payroll to a U.S. Payroll system, you must change the Country setting to Both after re-registering and restarting Sage

HRMS. From the navigation pane, go to Setup > System > Enterprise Setup to change the Country setting.

You need your serial number and installation code to add new items to your system. If you don't have this information, call Sage HRMS Customer Service, Monday through Friday from 8:30 a.m. to 5:30 p.m. ET at 800-424-9392.

To re-register Sage HRMS

1. Launch Sage HRMS.

2. Select Register Sage HRMS from the Help menu.

3. The Register Sage HRMS window opens.

   ○ This window shows your current serial number and installation code. If you are re-registering to add another module, option, or link, enter your new serial number and installation code.

   ○ If you want to add the Sage 100 Standard Link, Sage 100 Advanced ERP G/L Link, Sage 500 ERP G/L Link, or Sage X3 G/L, select the associated check boxes.

4. Click **OK** to complete the registration and close Sage HRMS. A message prompts you to restart Sage HRMS.

5. Launch Sage HRMS and then log on. The main menu and navigation pane reflect the new options and modules as registered.

   > **Note:** When you add a link or interface, they become accessible from the Connected Services menu.

6. To keep your system secure, review your user and group security and make any necessary changes for the new products or options you installed.