Sage HRMS 2015
Sage Employee Self Service
Release Notes

November 2014

Document version: November 11, 2014

This is a publication of Sage Software, Inc.

Contents

Release Notes

Important! All customers who update, maintain, and use Sage HRMS should read these release notes to obtain valuable information about changes to the software program.

Release Information

Product: Sage HRMS 2015 and Sage Employee Self Service version 2015

This document describes enhancements and modifications in Sage HRMS and Sage Employee Self Service specific to version 2015.

We recommend that either a Sage HRMS certified business partner or a member of Sage Professional Services Group installs the program for you. You need the following to install the program:

- The **Sage HRMS 2015 installation package**, available as an electronic download from the Knowledgebase (https://support.na.sage.com). See Article ID 50161.
- The **Sage Employee Self Service 2015 installation package**, available as an electronic download from the Knowledgebase. See Article ID 51579.
- **SAP Crystal Reports® version 2011**, also available as an electronic download from the Knowledgebase. See Article ID 50162.
- The **System Requirements for Sage HRMS 2015**, available in the Knowledgebase. See Article ID 50163.
- The **System Requirements for Sage Employee Self Service 2015**, available in the Knowledgebase. See Article ID 52179.
- The *Sage HRMS 2015 Installation Guide*.
- The *Sage Employee Self Service Installation and Setup Guide*.

Note: Current product guides are available on the Sage HRMS Product Documentation website, also linked from within the Help menu inSage HRMS.

Important Upgrade Information for Sage HRMS

Before you upgrade:

- There are several procedures you must complete on your current system to prepare it for the upgrade. These procedures are provided in the *Installation Guide*, and it is imperative you review the guide before you install the upgrade.

- You must log on as a user with administrator privileges before you can upgrade a client workstation.

After you upgrade:

- Make sure your quarterly payroll taxes are up to date with the current quarter and release. To install the latest tax updates, visit the Sage Knowledgebase at https://support.na.sage.com.
- Before processing payroll, you must review the mapping for all Employee Configuration Profiles created in the previous version. To update the mapping:
  i. Open Sage HRMS 2015.
  ii. Select **Setup > Payroll > Database Setup > Employee Configuration**.
  iii. Open each profile, review, and click **Save**.
- Review your **Group Security** to make sure the new menu items are set to **Allow Access** for the appropriate users. Note that the user MASTER automatically has access to all new functionality after the upgrade.

Information Regarding Future Updates

The following chart outlines the Sage HRMS product versions supported with Product Updates or Quarterly Tax Updates for each period this year.

Release	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015
Sage HRMS 2012	Yes	Yes	Yes	**Final Update**	—	—
Sage HRMS 2014	Yes	Yes	Yes	Yes	Yes	Yes

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.
- **Customer Support**. For additional articles and resources, visit https://support.na.sage.com or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Customer ID handy when contacting Customer Support.

- **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.

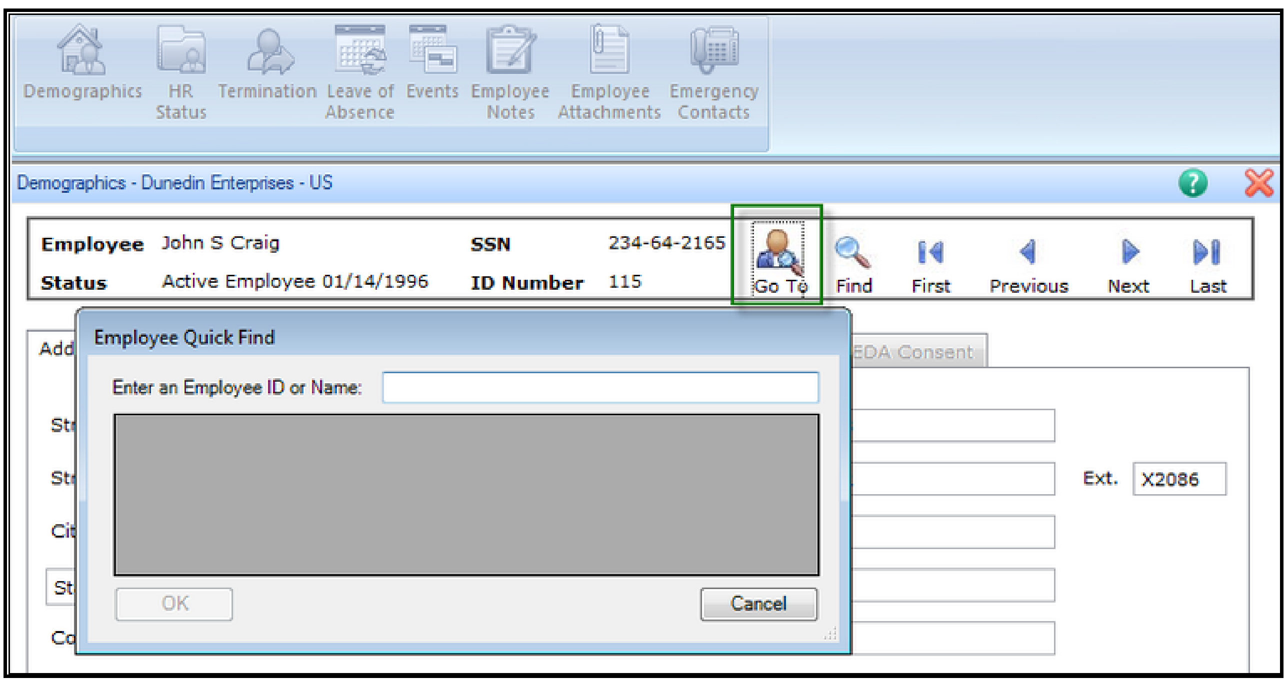
The following new features and improvements to Sage HRMS are included with this release.

Enhancements

Employee Quick Find

New functionality is available in Sage HRMS on the detail pages in the View/Edit Employee windows. You can now quickly and easily search for employees by ID, first name, or last name. This new function is called Employee Quick Find and gives you the option to type the first few digits of an employee's name or ID and a complete list of all matching records is displayed.

The Employee Quick Find button  is available on most of the employee detail pages in the Employee toolbar, as displayed in the image below.



Employee Find by Supervisor

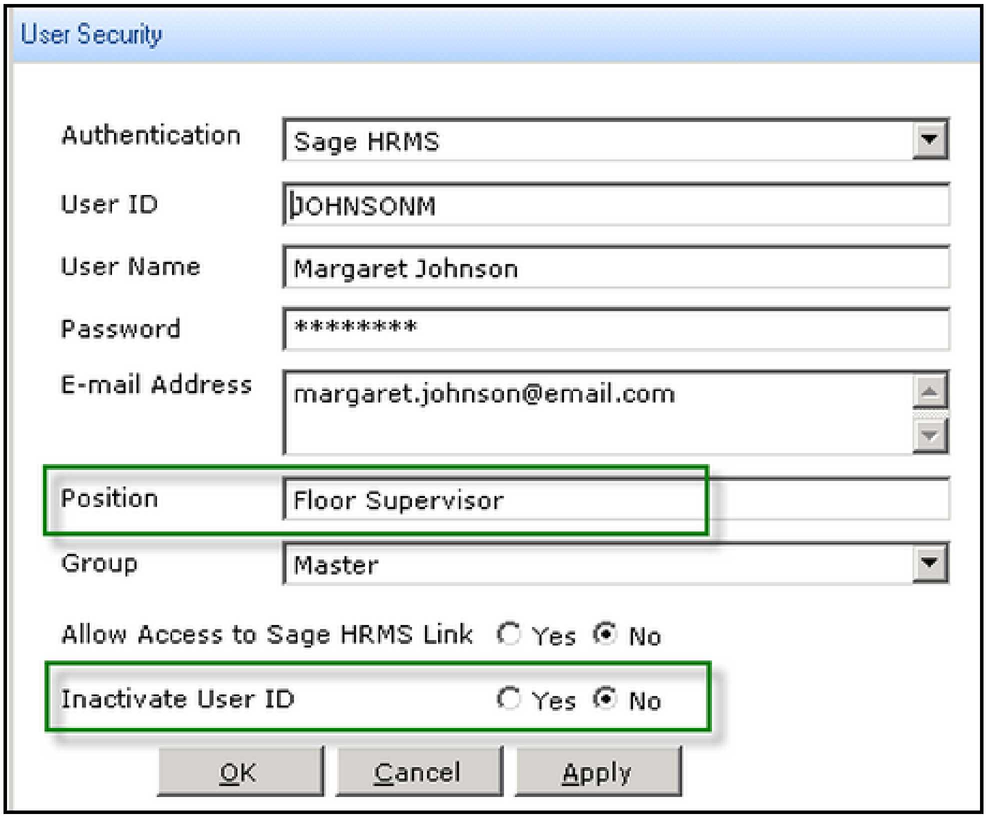
Prior to this release, if an employee existed in more than one Employer in Sage HRMS and you used the Employee Find function to search for an employee by the supervisor, not all employees reporting to that supervisor would display. This issue has been resolved and now all employees reporting to the supervisor display, regardless of the employer.

User Security Inactivation and Position

With this release, you are no longer required to delete a Security user in order to remove the user's permissions. You can now inactivate the user so the user can be reactivated again at a later time. To inactivate a Security user, from **Setup > System > Security > User Security** select the user, and click **Yes** next to Inactivate User ID.

In addition to this new functionality, you can now also identify the user's job title or **Position** with a new alpha-numeric text field.

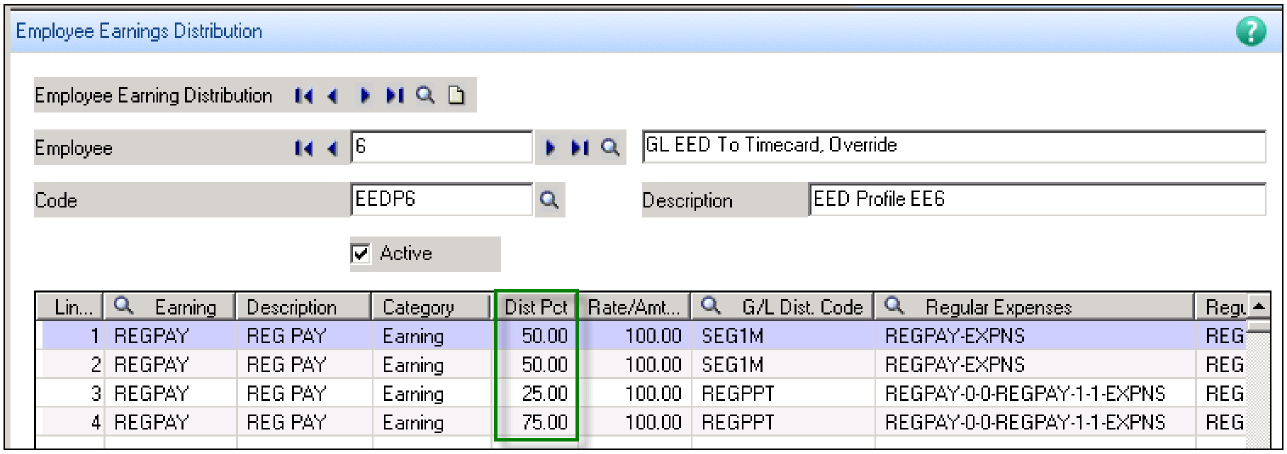
> **Note:** While it's still possible to delete a user, the **Delete** button was removed from the User Security window to encourage use of the inactivation function. It is not possible to inactivate the Master user.



Employee Earnings Distributions and G/L Distribution Codes

When creating an employee's Employee Earnings Distribution Profile (**Payroll > Tasks > Employee Earnings Distribution**), previously a maximum of 100% could be distributed to each earning code, regardless of the number of G/L distribution codes because the requirement was at the earning code level. Now the distributions can be distributed by G/L Dist. Code, with a maximum of 100% distributed to each G/L Dist. Code under the earning code.

For example: In the image below, the earning code REGPAY is set up with G/L Distribution Codes SEG1M and REGPPT. These distribution codes were added to the Employee Earnings Distribution profile so that REGPAY with SEG1M has 100% distribution. At the same time REGPAY with REGPPT has 100% distribution.



Savings Plan Defaults

The value you choose for the Employer Contribution Type (either amount or percentage) on your Savings Plans setup now defaults when the plan is added to an employee.

Inactive HR/Employee Codes

The system has been enhanced with a feature that hides HR/Employee codes once they are inactive, either through marking the code inactive or once a code reaches an expiration date. The codes that are now hidden when inactive or expired are **Benefit Insurance Plans**, **Benefit Savings Plans**, **Job Status Codes**, **Employee Note Author**, **Employee Note Type**, **Salary Grades**, **Employee Type**, **Events**, **Ratings**, **Shift Differential**, and **Skill**.

Note: This change affects the display of codes on the windows mentioned above. The EEO reports are not impacted.

Forwarding Address Fields

The **Forwarding Address** fields on the second tab of the **Employee Termination** window has been updated to allow foreign addresses. The **State** field now provides the option for **Province** or **Other** (region).

EEO-4 Headcount Summary Report

The EEO-4 Headcount Summary report has been modified to make it clearer that this report is actually a worksheet and is not intended to be submitted to the government as the official EEO-4 form.

Additional Information for the WSIB Form 7 (Canada only)

The WSIB Form 7 Workers' Compensation report (**Reports > Employees > OHS Reports > WSIB-Employers Report Form 7**) has been updated to include Additional Information entered when adding a claim on an employee record (**Employees > View/Edit Employee > Safety tab > Workers Compensation > Add**). The Approval tab on the claim entry window now provides a text box so you can type additional information. The text field is limited to 1500 characters.

Modifications

Leave of Absence Date

The **Change Effective** date field on the **Current Job** employee detail page of the Job and Pay tab (**View/Edit Employee > Job and Pay > Current Job > Job**) now populates with the actual Leave of Absence (LOA) date entered for the individual employee.(16114)

Current Job Detail Page Job Title

Previously, if you viewed the Current Job detail page (**Employees > Tasks > View/Edit Employee > Current Job**) and selected the job code field, the job title would display incorrectly. This issue has been corrected with this release and now the job title matches the job code as expected. (15743)

Current Pay Detail Page Code List Sorting

Prior to this release, the **Job Code** and **Change Reason** drop-down lists on the Current Job detail page (**Employees > Tasks > View/Edit Employee > Job and Pay > Current Job > Job** tab) may not have listed the job and reason codes in alphabetical order. This same sorting issue may have applied to the org level drop-down lists on the **Current Job > Organization** tab. Both issues have been corrected and all codes sort alphabetically.

Pay Equity Job Group Code Field Length

The Job Group Code specifically for **Pay Equity** in the **HRJOBS** database table now stores up to 15 characters in the field (from the previous 6 characters), which matches the **HRTABLES** database tables. Additional tables and fields affected by this update are (15473):

Database Table	Field Name	Sage HRMS Window
HJOBHIS	J_JOBGRPPE	Details > HR > Job History
HRPERSNL	P_JOBGRPPE	Details > HR > Current Job
QMDICT	HRPERSNL.P_JOBGRPPE	Query > HR > Secure Query
QMDICT	HJOBHIS.J_JOBGRPPE	Query > HR > Secure Query

Employee Profile Report - Job History Information

Prior to this release, when previewing the Employee Profile Report (**Reports > Employees > Personal Information Reports** or a custom SAP Crystal Report) to retrieve Job History information, the records may not have been in chronological order by activity date but would instead list by date the record was created. This has been corrected and now the reports list the Job History activity in chronological order by the date in which the activity occurred. (16306, 13904)

Duplicate Employee IDs

Previously, if following a specific series of steps, it was possible to enter a duplicate employee ID in error on the Add New Employee window. After installing this update, you can no longer accidentally create a duplicate employee record or duplicate an employee ID.(16267)

Unique Savings and Insurance Plan Codes

Upon installing this update, you can no longer use the same code for Insurance Plans and Savings Plans. If you attempt to use the same or a very similar code, you will be prompted to enter a unique code instead.

Note: If you already have Insurance and Savings plans set up with the same code, this update won't change your existing codes and you can continue to use and edit them, if necessary. (16182)

Insurance Benefit and Savings Benefit Codes

Previously, if an insurance and a savings benefit had identical codes, if the insurance benefit was assigned to an employee, when the savings benefit was deleted from Setup, the insurance benefit would also be deleted. This has been corrected. (16110)

Employee Configuration Benefit Type Conversion Factor

Previously, if you used Employee Configuration to map a deduction or benefit to a Benefit Type with a conversion factor (**Setup > Payroll > Employee Configuration > Deduction/Benefit** tab), the conversion factor may not have worked. This has been corrected. (15926)

Salary Grades and Step Rate Codes Sequence

Previously, after editing Salary Grades and Step Rate codes (**Setup > Employees > Salary Grades** or **> Step Rates**), if you clicked the **Next** or **Previous** buttons, the window may have returned to the first record instead of the next or previous record. This has been corrected. (16463)

Customizing the Employee Toolbar

Previously, when customizing the Employee toolbar the HRMS menu in System > Processes > Customize Menu if you removed Current Job from the HR/Detail, you may not have been able to restore it. This has been corrected with this release and upon restoring the page displays again on the Employee toolbar (**Employees > View/Edit Employees > Job and Pay**). (15901)

Single Page/Multi-Record Custom Detail Page

When adding multi-records to a single page on the Custom Detail page in **System > Processes > Design Custom Details**, you may have experienced an error in prior releases. This has been corrected. (16064, 16032)

Secure Query Record Filter

If you used **Reports > Secure Query** to retrieve data with a missing date, you may have received an incorrect “No matching records found” results message in previous releases. This has been corrected and now you can filter using the **Is missing date** Operator in Secure Query. (9420)

SAP Crystal Reports® and Secure Query for Current Job Field

Previously, if the Direct/Indirect field had a value on the Current Job window (**Employees > View/Edit Employee > Job and Pay > Current Job**), the information did not display on custom SAP Crystal Reports® or Secure Query reports. This has been corrected. (15796)

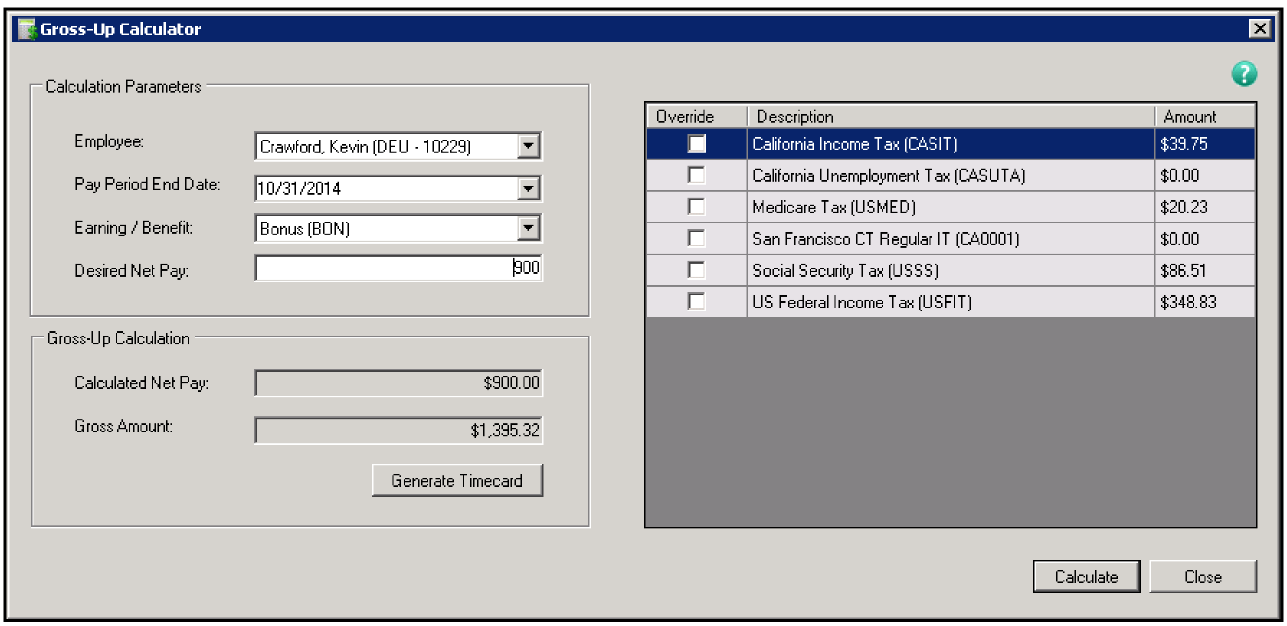
Payroll

The following new features and improvements to Sage HRMS Payroll are included with this release.

Enhancements

The Gross-Up Calculator

Sage HRMS Payroll (both U.S. and Canadian versions) now offers a **Gross-Up Calculator**. The new calculator can be accessed from the Quick Launch toolbar. Gross-up is a term referring to payments (such as bonuses, salaries, and so on) with built-in deduction and tax compensation. After entering the **Desired Net Pay**, you can choose the employee, earnings, taxes, and deductions that apply. Next you can override amounts as needed, and the calculator determines the gross amount to pay the employee. Once you have the right configuration you can generate a timecard with the calculation to be used directly in your standard payroll processing.



Custom SAP Crystal Reports® for Sage HRMS Payroll

Sage HRMS Payroll tables and fields are now available in Data Dictionary Reports (**Reports > System > Data Dictionary Reports**) and in **Abra Data Access Driver**. With this enhanced functionality, you can now easily create custom SAP Crystal Reports® and Ad Hoc reports for any payroll and HR information in the program. The enhancement includes greater ease in creating reports to retrieve data from multiple companies, if applicable.

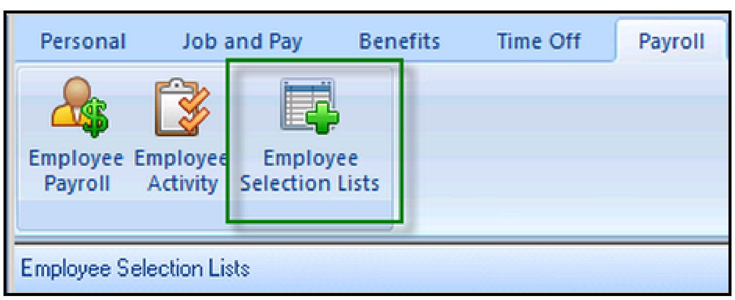
Note: With this release, the supported version of SAP Crystal Reports® is 2011. See SAP Crystal Reports® Upgrade in this document for more information about upgrading SAP Crystal Reports®.

Employee Selection Lists Detail Page

A new window has been added to the employee detail pages for payroll: Employee Selection Lists. You can now add assigning employees to Selection Lists to your Customized Steps (**System > Customize Menu > Product = HR**) to automate the process. This window is an extension of the existing Employee Selection task in Payroll and gives you the option to view applicable Employee Selection Lists on the employee record (**Employees > View/Edit Employee > Payroll** as shown in the image below). You can view and change the selection lists to which the employee belongs on each employee record. To create employee selection lists, you must continue to use the **Payroll > Employee Selection** window.

Note: This new detail page is available to the Master user by default, but you can give access to the page through Group Security (Group Level Product is Payroll, Activity is Detail, and Task is Employee Selection).

The new Employee Selection Lists employee detail page.



General Ledger Segments Extended Support

If you have selected to **Use Cost Center Overrides** in Payroll G/L Integration (**Setup > Payroll > Payroll Setup > Payroll G/L Integration > Basic Info** tab), the General Ledger segments can now post with *six segments* for earnings, deductions, and taxes set up with cost center override. Prior to this enhancement, only three segments could be assigned on the **Payroll G/L Integration** window **Segments** tab. This change means payroll can use the segments from the employee-level setup or the timecard if they use the **Regular Expense** account. In order for the segments to post to your G/L, you must select the check box **Cost Center Override Allocated Based on Calc Base** on the Earning/Deduction or Tax code setup.

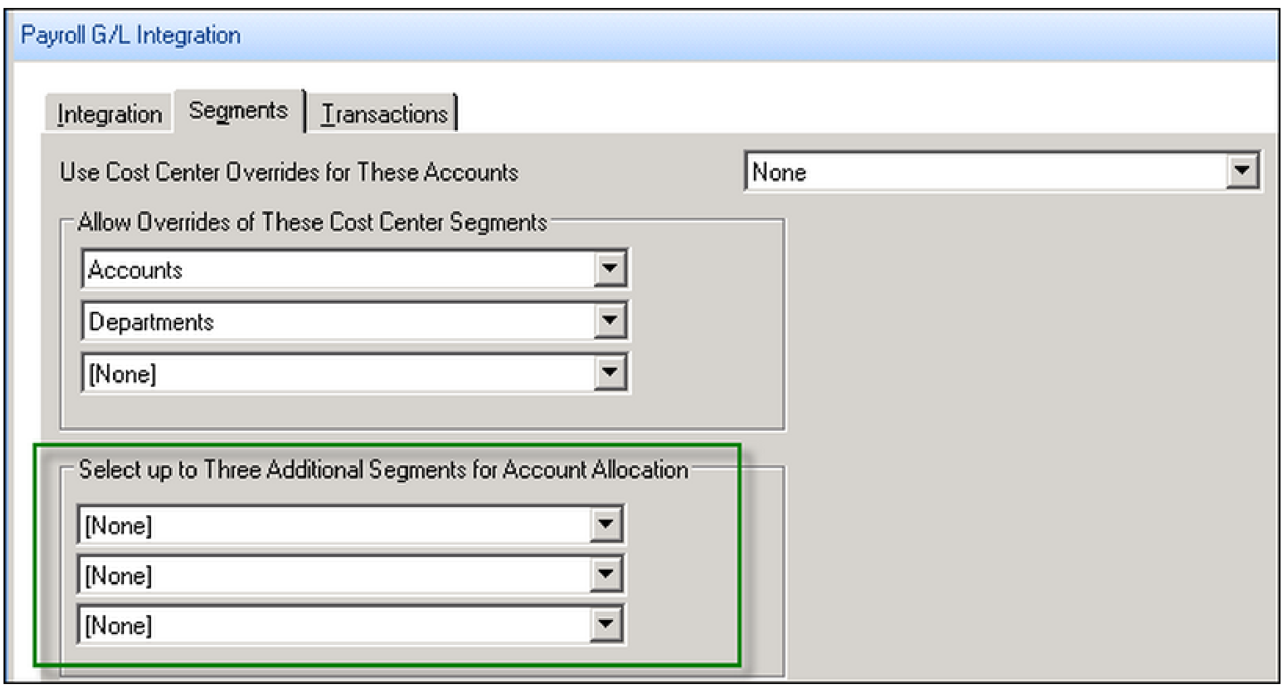
Important! Using the three new segments, as pictured below, is optional. However, once you set up the segments in Payroll G/L Integration and use them in payroll, the defined segments cannot be modified.

Allow Overrides of These Cost Center Segments

This section in **Setup > Payroll > General Ledger > Payroll G/L Integration > Segments** continues to function the same. Segment edits for these segments in a timecard continue to override employee-level G/L assignment (**Employee Payroll > Pay** tab).

Select Up to Three Additional Segments for Account Allocation

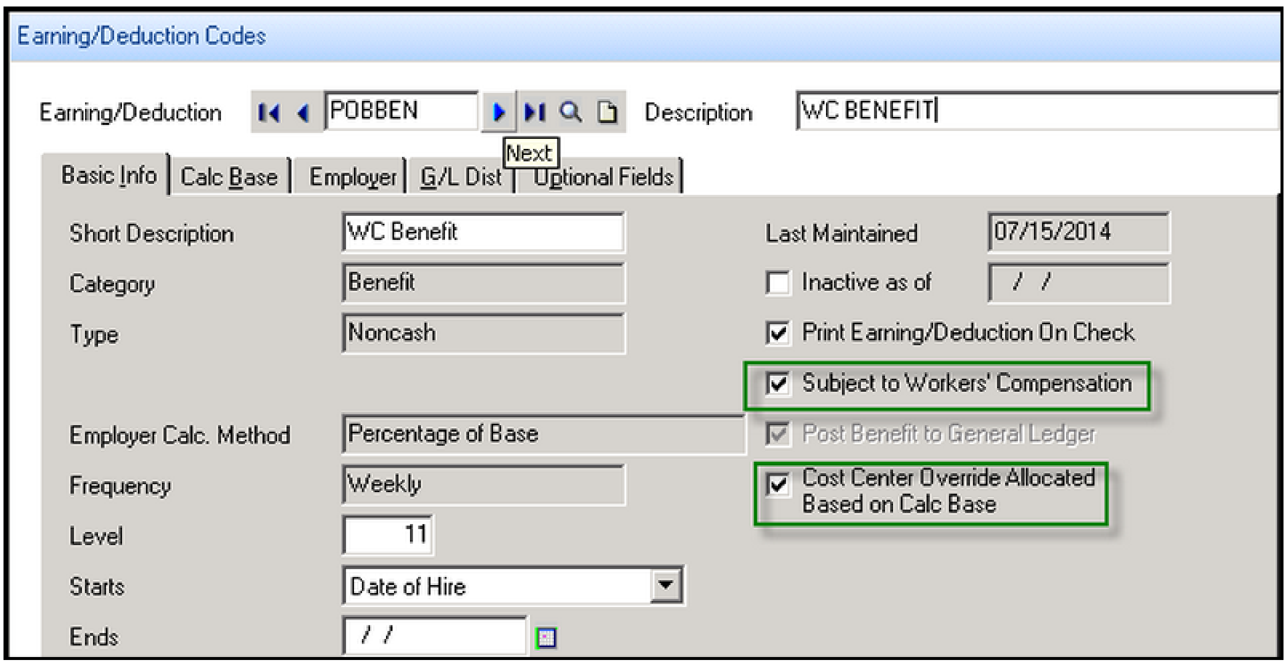
This new section in **Setup > Payroll > General Ledger > Payroll G/L Integration > Segments** is for you to define which segments should be used for your payroll account allocation, and you can use the segments at an account distribution level. You cannot override these three new accounts where Cost Center Overrides are typically available in payroll.



G/L Segments for Workers' Compensation

With this release, payroll processing accurately impacts G/L segments specific to Workers' Compensation with overtime and shift expenses set up when Segments (for Cost Center Override) are used in timecards. Other expenses are impacted by the Regular Expense account if the two selections are used (**Subject to Workers' Compensation** and **Cost Center Override Allocated Based on Calc**) in the Earning/Deduction Code setup (**Setup > Payroll > Earning/Deduction Codes**).

Note: The additional segments (those added in Payroll G/L Integration with this release) for Workers' Compensation default to the settings in WC Codes setup (**Setup > Payroll > Code Tables > Workers' Compensation Codes**). These segments cannot be overridden in the timecard.



Open Payroll Latest Change Dates

The Open Payroll process in the Process Payroll map now retrieves benefit plan record changes from HR (**Employees > View/Edit Employee > Benefits > Insurance Benefits**) based on the date of the latest change to the record (instead of the previous method of retrieving only those changes to benefits based on the benefit plan start/effective date). This means that if a benefit plan's start/effective date or change date falls within your Open Payroll specified date range (**Period Start** or **End** date), the system uses the greater of the two dates to determine if the affected records should be included when you **Get Employees**.

EFT Bank Transfer Name

During the New Hire process only, the employee's first and last name are now populated in the Bank Transfer Name field on the employee's EFT tab (**Employees > View/Edit Employee > Payroll > Employee Payroll > EFT** tab).

Note: For your employees with EFT or direct deposit already set up, the previous default information is populated in the field upon installing this upgrade. You can edit the field after installing the upgrade.

Earnings Distributions Notification (U.S. Payroll)

You can now view an employee record and easily determine if the employee has earnings distributions. After selecting an employee, on the **Employees > View/Edit Employee > Payroll > Employee Payroll > Pay** tab, if the employee has earnings distributions, ****Earnings Distribution Record Exits**** displays below Overtime Calculation. If the employee does not have earnings distributions, the space is blank.

Update Local Taxes Audit Payroll Report (U.S. Payroll)

A new report is available in Sage HRMS Payroll: the Update Local Taxes Audit report. This report, listed on the **Reports > Payroll > Setup Reports** window, gives you the option to audit and review a summary of changes made to local and custom taxes and rates. Security access within Sage HRMS Payroll are respected and users can only view local/custom tax changes for employees if the users have Master access, otherwise company level tax changes are all the user can review on the report.

A New CPP/QPP and EI Balancing Report (Canadian Payroll)

A new report is now available on the **T4s** report window (**Reports > Canadian Payroll > Government Reports > T4s**) to help you with balancing rates and amounts. The **CPP/QPP and EI Balancing** report lists only employees that are out of balance and includes the employees' gross pay, pensionable earnings, CPP/QPP deductions and calculations, and EI earnings and deductions. When generating the report you may be required to review and update your employees' T4 data. It's important that you correct any invalid employee data listed in the validation messages (for example, negative amounts for tax contributions) so you can view the report with accurate balancing issues identified.

Tip: For help printing the report, open the T4s report window and click the Help icon or press **F1**.

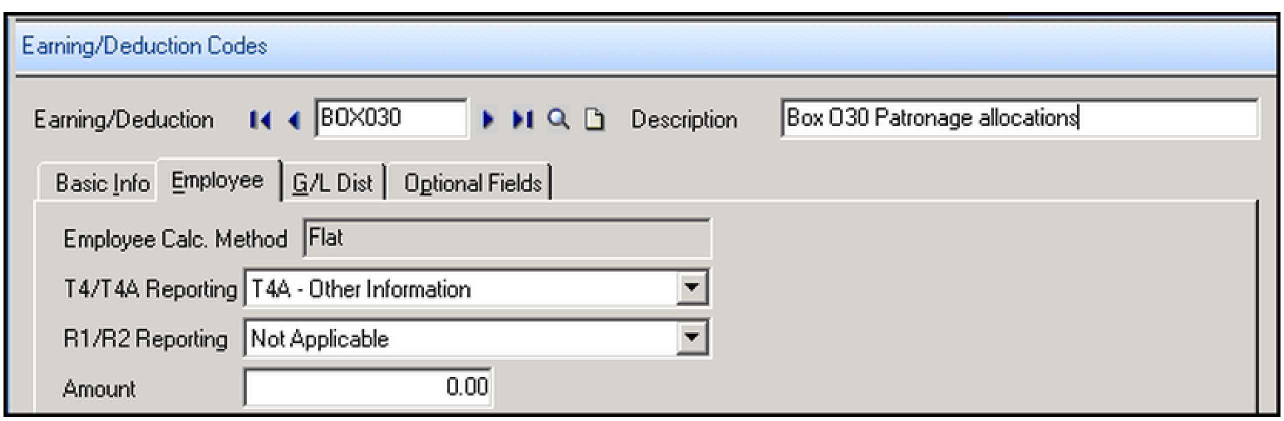
T4A and RL-2 Reporting Options for Earning/Deduction Codes (Canadian Payroll)

When setting up a new code under **Setup > Payroll > Earnings/Deductions Codes** in Canadian Payroll, you now have the option to indicate whether the employee amounts should be reported on the T4A (Statement of Pension, Retirement, Annuity, and Other Income) or the Relevé 2 (Revenus de retraite et rentes). This new selection is combined with the existing T4 and R1 menus as displayed on the **Employees** tab of the **Earnings/Deduction Codes** setup window.

Note: If you indicate that Earning/Deduction Codes should be reported on the T4A or the Relevé 2, amounts reported to the code will not be included on the T4 or Relevé 1 Forms.

If an employee is paid amounts reported to both the T4/RL-1 and T4A/RL-2 within a calendar year, while the amounts paid will be appropriately reported, the tax amounts are both included on the T4/RL-1. This is in compliance with CRA specifications.

Tip: On the **Setup > Payroll > Earnings/Deductions Codes > T4/T4A Reporting and R1/R2 Reporting** window, if you need to select a form box not listed in Sage HRMS, you can select **T4A - Other Information**, and/or **R2 - Other Information**. Here you can enter the box number in the code field and description for the box from the T4A or the RL-2 forms to help identify the amounts during payroll processing and reporting.



After set up, you can use the new report available in Payroll Transaction Reports, Earns/Deds Summary for T4A/R2, to review the amounts to enter on the T4A and Relevé 2 forms when you are ready to file.

Important! Filing for the T4A and Relevé 2 forms is currently not supported in Sage HRMS.

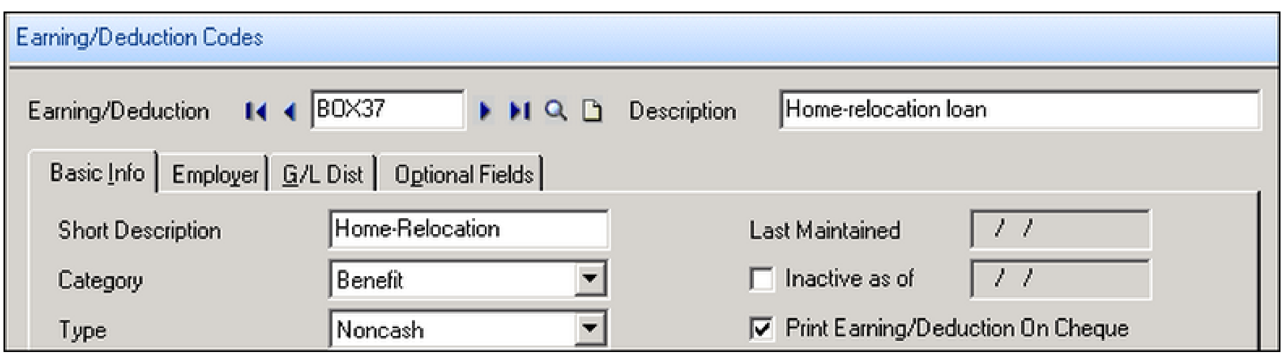
T4A and RL-2 Summary Report (Canadian Payroll)

A new report is available with this release to support the addition of the T4A (Statement of Pension, Retirement, Annuity, and Other Income) and Relevé 2 (Revenus de retraite et rentes) code setup as described in this document. The **Earns/Deds Summary for T4A/R2** is available in **Reports > Canadian Payroll > Transaction Reports**. Once you make your selections for the reporting criteria (year, report type, category, employees to include, and so on), the report displays the codes set up for T4A or R2 reporting, with the amounts per employee for the period indicated.

T4 Box 37 Employee Home-Relocation Loan Deduction (Canadian Payroll)

Box 37 (Employee home-relocation loan deduction) on the T4 slip is now supported in Sage HRMS Payroll through the **Earning/Deduction Codes** setup. This new setting can be used in conjunction with Box 36 (Interest-free and low-interest loans), if all or a portion of the loan was used by the employee for home relocation. Amounts should never be reported into Box 37 unless (all or a portion of) the amount is already reported in Box 36. To report a deduction to Box 37, set up the code as a non-cash Benefit (**Setup > Canadian Payroll > Earning/Deduction Codes**) as displayed below.

Earning/Deduction Codes > Basic Info tab



Earning/Deduction Codes > Employer tab

Modifications

Distribute Earnings Process (Canadian Payroll)

With this release, the **Process Payroll** map > **Distribute Earnings** function has been removed from Sage HRMS Canadian Payroll. This function is unique to U.S. Payroll processing and when used in Canadian Payroll it would generate an error because the process doesn't apply to the Canadian Payroll steps. (16098)

Employee Payroll Position and Supervisor Fields

Previously, the employee's Position and Supervisor fields on the **Employees > Tasks > View/Edit Employee > Payroll > Employee Payroll > Class/Schd** tab would blank when changes were made to the employee record. This issue has been corrected with this release and information entered in the fields remains upon saving the employee record. (15572)

Distribute Earnings and Multiple Timecards

Previously, the earnings distributed to the first timecard during the payroll process as expected, but may not have distributed to a second or subsequent timecards issued for the same date and processed on the same day. The earnings distribution process now properly allocates during the payroll process for all timecards as defined in the employee's Earnings Distribution setup (**Payroll > Tasks > Employee Earnings Distribution**). (15881)

Code Setup for State/Province

When setting up State and Province codes in Sage HRMS under **Setup > Employees > Code Tables > State/Province**, you can now add a state/province/region code using the option **Other** for countries other than the U.S. or Canada. (16193)

Payroll Calendar Control

With this release, Sage HRMS Payroll has been updated to allow the Calendar Control on the **Payroll > Tasks > Open Payroll** window to function as expected. You can continue to enter the date by typing the date numbers, but now you can also click the calendar icon to open the visual calendar display and select a date. (13712)

Printing Checks with Accrual Calculation Method of None

Previously, when your Time Off plans used the **Calculation Method** of **None**, if there was a value in the Payroll Accrual field, printing payroll checks would generate an error message. This issue has been resolved and now when a new Attendance Plan is set up, it must have a calculation method selected.

Important! If any of your Time Off plans are set up as described above, prior to processing payroll you must update the plans and choose one of the available calculation methods: **Accrual** or **Lump Sum**.

Print/Post Checks after Imported Transaction History

Prior to this release, if you imported Transaction History for your employees then processed payroll, the Print/Post Checks process may have had delays before completing. The process has been updated and now you can Print/Post Checks in a timely manner after importing Transaction History. (16155)

Employee Demographics Country Code

Existing employees with the country code listed as USA on the Employee Payroll detail page (**Employees > View/Edit Employee > Payroll > Employee Payroll > General** tab) will appear on your Open Payroll process window the next time you process payroll after installing this update. The country code “USA” has been changed to “US” with this release, and if any new employees are added to the system (for a U.S. employer), if the country code is left blank it will default to US. (16355)

Sage Employee Self Service

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

Modifications

Time Off Transactions

Sage Employee Self Service now displays a scroll bar on the Time Off Transactions screen. This functionality gives you the option to see all historical absence transactions, including all of those that haven't been deleted from the system. (15890)

Provider Enrollment Details and Enrollment Reports

Previously, the Provider Enrollment Details and Enrollment reports used the employee's name to generate information, and if two employees had the same name the report would error. Now when you generate the report, the system uses the employee id and the company code to retrieve information successfully, regardless if you have two employees with the same name. (16178)

Managers without Active Employees

Previously, when a manager without active employees logged into Sage Employee Self Service, the system would display an error. This has been corrected. (16147)

Widget Failure with Step Rates

Previously, when a manager with active employees logged into Sage Employee Self Service, and Step Rates were in use, when Employee, Manager, or System Administrator widgets were loaded, the system would display an error. This has been corrected. (16146)

Sage HRMS Link

The following improvements to Sage HRMS Link are included with this release.

Modifications

Sage HRMS Link Import/Export

Prior to this release, when using the import/export process in Sage HRMS Link for a custom table, if you added a date field to the import template, you may have received an error. With this release, this issue has been resolved and you can now import/export date fields for custom tables without errors. (15855)

Employee Phone Numbers in ADP Export File

Previously, when using Sage HRMS Link to export a file to ADP, the employee’s phone number was not included. This has been corrected. (16124)

ADP Export File for Benefit Codes

Prior to this release, if you created an ADP export file with Sage HRMS benefit codes longer than ADP allows, an error message displayed repeatedly (for each code and each employee in the file). With this release, the message displays once per file if the codes are incorrectly formatted. (16198)

Sage HRMS Link Supplemental Field

The Sage HRMS link now exports the employee type setting from the Supplemental field on the ADP Template tab to the *.csv file. (16360)

Sage HRMS Train

The following improvements to Sage HRMS Train are included with this release.

Modifications

Sage HRMS Train Security with Canadian Payroll

Previously, if you used Canadian Payroll and Sage HRMS Train, you may have experienced errors when attempting to set user preferences. After installing this upgrade, the errors have been resolved. (15600)

Class Rosters Report

The Class Rosters report (**Reports > Training > Class Administration Reports**) now provides data without errors. This includes if one or more of your training class enrollees are on the Wait List (participants are set to **Wait**) for the class. (12038)

Training History by Course Report

The Training History by Course report, available in Sage HRMS Train under **Reports > Training > Training Analysis Reports**, now provides the requested information without errors for courses that are completed, including when the sorting options are set to **End Date**. (16333,16366)

Employee List Report Group Security

Previously, if you previewed the Employee List located in **Reports > Training > Employee Training Reports**, and the user had a product filter set up in Group Security, an error would generate. This has been corrected. (16040)

Import Calculations Certification Dates

Previously, if you used the Training Import Calculations under **Training > Processes > Import Calculations**, the system would change the **Training Certification** expiration dates (**Training > View/Edit Trainee > Training > Certifications**). This has been corrected. (16066)

Training Code Table Report Headings

Previously, when previewing the Training Programs Code table report in **Reports > Training > Catalogs and Code Tables**, the program description indicated the description of the first course. This has been corrected to display the program description. (11417)

Mailing Labels Report and Attendance Plans

Previously, after adding a new Attendance Plan, if you viewed the Mailing Labels training report (Reports > Training > Class Administration Reports > Mailing Labels), an error would display. This has been corrected. (12488)

Sage 100 Standard ERP Link

The following new features and improvements specific to the Sage 100 Standard ERP integration are included with this release.

Modifications

- Prior to this release, the Sage 100 Standard ERP Link would assess three of the date fields on the **Employee > Benefits > Insurance Benefits** and **Savings Benefits** detail pages **Benefit Plan** tab to determine if benefits should be transferred. After installing this upgrade, the Link transfers benefits based on an assessment of the following four date fields:
  - Latest Change to Amounts/Latest Change (new)
  - Employee Coverage Begins/Effective Date
  - Employee Coverage Ends/Expiration Date
  - Date Waived/Waive Date
- With this release, Sage 100 Standard ERP Link has been corrected to accurately transfer the benefit information with newly hired employees. This means that the benefit codes now accrue time in payroll without the requirement of editing the new employee's benefit code record in Sage HRMS. (15693)
- Sage 100 Standard ERP Link no longer erroneously transfers benefit contribution amounts to the **Deduction Code Maintenance** window **> Ded. Goal** field in Sage 100 ERP Payroll. (16300)

System

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

Enhancements

SAP Crystal Reports® Upgrade

With this release, Sage HRMS is now compatible with SAP Crystal Reports® version 2011. To upgrade your version of SAP Crystal Reports®, visit the Knowledgebase, search for article ID 50162, and follow the steps to download and install the program. SAP Crystal Reports® 2011 is provided as a component of the upgrade to Sage HRMS 2015.

Note: This upgrade is required if you use SAP Crystal Reports® Designer to create and edit custom reports.

Affordable Care Act Integration: My Workforce Analyzer

Now you have the power to track and analyze your company information so you can make the informed decisions necessary about healthcare and the Affordable Care Act (ACA) requirements. With My Workforce Analyzer, you can analyze your employee hours to determine if you qualify as a large employer. You can determine coverage affordability, explore the pay-or-play decision (offer coverage or take the penalty), and examine employee hours in order to monitor and manage part-time and full-time eligibility. All of this is at the touch of your fingers and delivered through the secure Sage Source platform.

The online service is offered as an integration and uses your data from Sage HRMS (both HR and Payroll are required) to analyze it in relationship to the ACA. There are three core functions of My Workforce Analyzer:

1. **Monitoring**. This key feature provides workforce monitoring dashboards available to track important details for the ACA, such as:
   a. Your full-time and full-time equivalent employee counts.
   b. Your company's status as a large employer, both current and for next year.
   c. Your employees' hours of service, and employees reaching the thresholds of part-time to full-time hours.
   d. The countdown to the next Administrative period, in which you can make changes to employee full-time and part-time statuses and healthcare coverage offerings.
2. **Pay or play**. Deciding whether to pay or play—pay penalties or offer your full-time employees affordable healthcare coverage—can be challenging. Use this feature to:
   a. View a summary of your annual expenses, including cost of benefits, penalties, and taxes.
   b. Compare your annual expenses based on four scenarios:
      - Optimized. The My Workforce Analyzer analysis of your data, presented in an optimized, best case scenario.
      - No offer. The penalties your company would be responsible to pay if you do not offer (minimum essential) healthcare coverage.
      - Current. Your company's current expense profile, based on current full-time employee count and existing healthcare coverage.
      - Customized. The employee-to-employer healthcare contribution ratio that you can adjust in order to see the immediate impact on penalties versus healthcare coverage expenses to your company.

3. **Employee information**. Keeping track of your employees' full-time and part-time status, healthcare benefit coverage, subsidies, and variable hour employee status is made easy with this series of reports and summaries. Use this feature to view:
   a. A summary of employees with and without healthcare coverage, with employee and employer contributions listed by employee.
   b. A monthly breakdown of healthcare coverage affordability by employee.
   c. A summary of employees who receive subsidized healthcare coverage through a state health insurance exchange.
   d. The regulatory period time frames and employees who have been identified as variable hour.

Visit MyWorkforceAnalyzer.com for more information. To sign up for My Workforce Analyzer, **call Sage Sales Operations at 866-271-6050**, Monday to Friday, 8:30 a.m. to 5:30 p.m. ET.