



# Sage HRMS 2014

## Release Notes

October 2013

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# Release Notes

**Product:** Sage HRMS 2014

## Overview

This document includes enhancements and modifications in Sage HRMS 2014 and Sage Employee Self Service 2014.

We recommend that either a Sage HRMS certified Channel Partner or a member of Sage Professional Services Group installs the programs for you.

You will need the following to install the program and to identify the new features to Sage HRMS 2014:

- The Sage HRMS 2014 Installation Package (available on the [Sage Customer Portal](#)).
- SAP Crystal Reports version 2008.
- The *Sage Employee Self Service v2014 Pre-Installation Guide* and the *Sage Employee Self Service v2014 Installation and Setup Guide*.
- The *Sage HRMS 2014 Installation Guide*.



**NOTE:** The most current Sage HRMS product documentation is available on the [Sage HRMS Product Documentation](#) website, also linked from within the Help menu of Sage HRMS.

## Important Upgrade Information for Sage HRMS

- **Before you upgrade**, there are several procedures that must be completed on the current system to prepare the system for the upgrade to Sage HRMS 2014. These procedures are provided in a separate *Installation Guide* document which is accessible from the Sage HRMS Installation Package. It is imperative that the procedures are completed before upgrading the system.
- **Before you upgrade a client workstation**, you must log on as a user with administrator privileges.
- **After you upgrade and before running a payroll**, you must update the mapping for all Employee Configuration Profiles created in the previous version. To update mapping, open Sage HRMS 2014 and from the Navigation Pane, go to **Setup > Payroll > Database Setup > Employee Configuration**. Open each profile and click **Save**.
- **After you upgrade**, make sure your quarterly taxes are up to date. If you need to install Sage HRMS 2014 tax updates from previous quarters, you can obtain the updates on the Sage Customer Portal at: <https://customers.sagenorthamerica.com>.
- **After you upgrade**, go to **Group Security** and make sure the new menu items are set to **Allow Access** for the appropriate users. Note that user MASTER automatically has access to all new functionality after the upgrade.

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## Support and Documentation

Sage strives to provide you with the very best support in the industry. If you have a question, we provide the following methods for you to get your answer as soon as possible:

- **Refer to the Help menu** in Sage HRMS for assistance. To access Help, select **Contents** from the Help menu within Sage HRMS and use the Table of Contents, Index, and Search function to find what you need. You can also click  or press **F1** to open Help for the function you are currently using.
- **Log on** to the Sage Customer Portal at: <https://customers.sagenorthamerica.com>
  - Search for solutions to common problems
  - Download product updates
  - Read technical information
  - Open a technical support case
  - Create a service request
  - Grant your channel partner permission to view your support tickets
- **Chat** with a support analyst using Sage Live Chat, Monday through Friday from 9:00 a.m. to 5:00 p.m. Eastern Time at: [http://kb.sagesoftwareonline.com/app/chat/chat\\_launch](http://kb.sagesoftwareonline.com/app/chat/chat_launch)
- **Call** Sage HRMS Support, Monday through Friday from 8:00 a.m. to 8:00 p.m. Eastern Time at **800-829-0170** in the U.S. or **800-330-2607** from Canada. Please have your Customer ID handy when contacting Support.

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# Human Resources

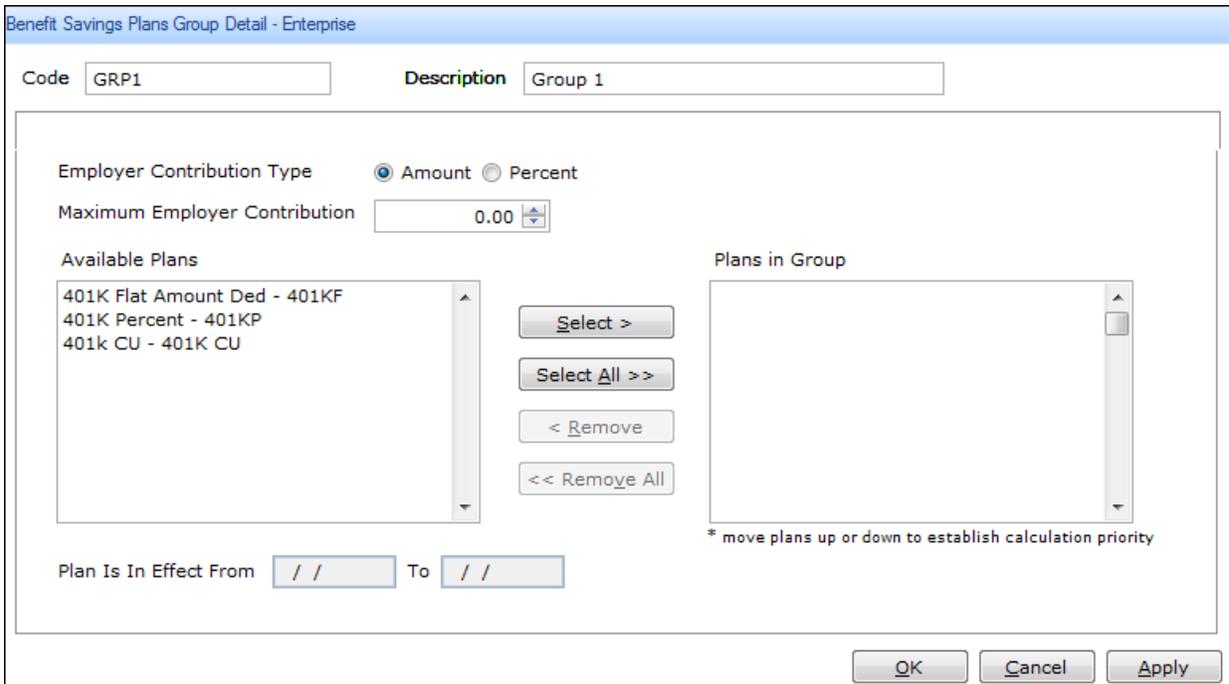
## Enhancements

### Benefit Savings Plans Groups

A new feature is available in **Sage HRMS > Employees > Benefits**: Benefit Savings Plans Groups. The feature allows you to combine savings plans so that the employer contributions are calculated from the combination of the savings plans. For example, you may provide a pretax 401(k) plan and a post-tax Roth 401(k) plan. The total employer match should be no more than 6.0% of the employee's contribution. Now, an employee with these two plans contributes 5.0% of his pay to the pretax plan and 3.0% to the post-tax Roth plan. When these two plans are combined in a savings plans group, the system uses the combined rate tables to determine the total employee contribution and then calculates the total employer match, respecting the maximum value you designate. The **Maximum Employer Contribution**, as pictured below, allows you to set limits to multiple plans.

 **NOTE:** In order to use Benefit Savings Plans Groups with Sage Employee Self Service, you must upgrade to the current version (2014) of Sage ESS.

To learn more about Benefit Savings Plans Groups and for step-by-step instructions to use the new feature, see Sage HRMS **Help > Setup > Employees > Setup Benefits > Set Up Benefit Savings Plans Groups**.



Benefit Savings Plans Group Detail - Enterprise

Code  Description

Employer Contribution Type  Amount  Percent

Maximum Employer Contribution

Available Plans

- 401K Flat Amount Ded - 401KF
- 401K Percent - 401KP
- 401k CU - 401K CU

Plans in Group

Select >

Select All >>

< Remove

<< Remove All

Plan Is In Effect From  To

\* move plans up or down to establish calculation priority

OK Cancel Apply

## Automatic Alphanumeric Employee IDs for New Hires

The system now supports a combination of alphanumeric and numeric employee IDs without restructuring existing IDs in your database, in addition to the preexisting functionality of automatically generating numeric employee IDs during the **Add New Hire** task. This means that if you select **No** for **Numeric Employee ID** on the **Setup > Employees > HR Setup** window, Sage HRMS interprets your default employee IDs as alphanumeric, but still allows you to enter new sequential numeric IDs. When you add a new employee the system uses the highest existing *numeric* employee ID (empno) to generate the next ID as follows:

- If you have a numeric employee ID in the system, the system takes the highest existing number and increases it by one. For example, the highest existing ID number (not necessarily your last new hire) is employee ID 3615, the system generates the employee ID 3616 the next time you add a new hire.
- If none of your employee IDs are numbers, the system will not automatically generate and suggest an ID during the Add New Hire process. For example, if your last new hire was added with the employee ID 1002STAFF, the system will not suggest an ID.
- If you have employee IDs that are alphanumeric and others that are numeric in your database, the system automatically generates the subsequent numeric-only ID. For example, your last new hire was added with the employee ID 1003DUN, but you also have employees with the IDs 12618, 10402, and 171. In this case the system automatically generates the employee ID 12619 the next time you add a new hire.



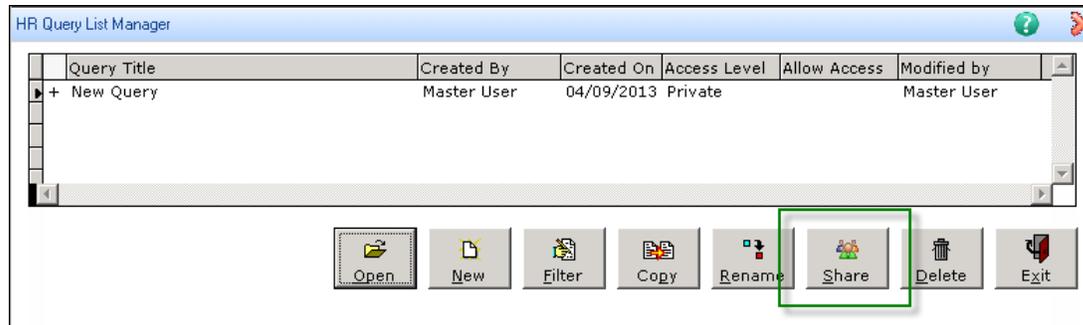
**NOTE:** This enhancement is the most useful if you already use a combination of alphanumeric and numeric IDs. The system will no longer restructure existing IDs in your database but instead maintain the integrity of your data while allowing you greater freedom when choosing employee IDs. You are not required to use the system generated employee IDs.

## Shared Secure Queries

With this release, you have the ability to control, edit, and limit sharing of Secure Queries you create and use in Sage HRMS HR, Time Off, and Sage HRMS Train. The new **Share** button, visible when the **Access Type** is set to **Private** as pictured below, allows you to share your private Secure Query reports with the employees of your choice, while respecting User and Group Security rules.



After selecting the **Share** button, you are prompted to select the user names with which to share the query, and then prompted to select either **View Only** or **Update** access for the users. You can also edit the users added to private saved queries by selecting the **Share** button (see image below) on the **Query List Manager** window.



## Modifications

### Employee Profile Report

The Employee Profile Report (from **Reports > Employees**) now includes the following:

- A report margin alignment correction. (14549)
- The VETS100A categories; Armed Forces Service Medal and Campaign Veterans. (11591)
- Employee beneficiaries. (15359)
- New I-9 document descriptions with the codes. (IdeaScope 956)
- Job History information in chronological order.(13904)
- The HR Details fields; Original Hire Date, Last Hire Date, Pay Period Salary, Next Pay Review, Next Performance Review, Hours/Units, Last Pay Change, and Change Date.(11947)

### Using Windows Authentication Logon

Some customers received an error message when trying to add a new user in Sage HRMS using the Windows Authentication process. Upon installing Sage HRMS2014, you can add new users to the Windows Authentication Group, either with a numeric user ID, alphabetic user ID, or a combination of the two, without first adding the user to the Master group and without receiving an error. (15665)

### Sage 100 ERP Employee Transfer

The Sage 100 Standard ERP Link process previously generated an error message if the employee was entered in Sage 100 ERP without a **Hire Date** and then transferred to Sage HRMS. This has been resolved and now if the Hire Date is blank, the Validation Report lists the employee and the missing required field. (15917, 15545)

# Time Off

## Enhancements

### Attendance Functionality

With this release, we have greatly enhanced the Attendance functionality in Sage HRMS. Overall, the system now supports greater flexibility for attendance plans and seniority-based accrual rates. Your **Accrue Time** processes now update pertinent reference fields throughout the **Attendance Summary** windows, as well as update the rules that govern attendance plans. Additionally, a few fields and options have been renamed to improve usability; you can review the updates and how they can enhance your attendance plans in the [Enhancement Details](#) table below.

### New Accrual Calculations Processes

Attendance plans calculate seniority-based accruals depending on the **Attendance Plans Detail > Seniority Levels** tab > **Calculate Service as of** selection as displayed in the image below.

Attendance Plans Detail - Enterprise

Code: VAC-STD Description: Vacation, Standard Plan

General Seniority Levels Absence Reason Codes Point System

Include previous year carryover in max calculation

Level	After Months	Hours Earned	Max Available	Max Carryover	Level	After Months	Hours Earned	Max Available	Max Carryover
1	0	80.00	0.00	99.99	6	0	0.00	99999.99	99999.99
2	60	120.00	0.00	99.99	7	0	0.00	99999.99	99999.99
3	120	160.00	0.00	99.99	8	0	0.00	99999.99	99999.99
4	0	0.00	99999.99	99999.99	9	0	0.00	99999.99	99999.99
5	0	0.00	99999.99	99999.99	10	0	0.00	99999.99	99999.99

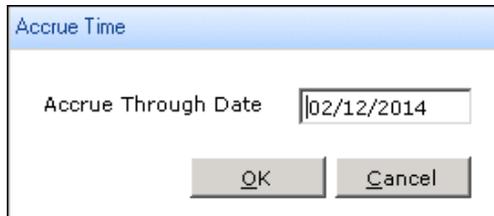
Use: Specified Date

Calculate Service as of: **Accrue Through Date**

- Accrue Through Date
- End of Last Month
- End of Current Month
- Previous Plan Year-End
- Current Plan Year-End

Previous Next OK

The **Accrue Through Date** is recorded when you use the **Accrue Time** process as pictured below. The **Accrue Through Date** entered is recorded on the affected employees' **Attendance Summary > Accrual Summary > Accrued Date** field. The **Accrue Time** process can be performed from **Time Off > Tasks > Accrue Time**, from the employee record, or from **Process Payroll > Process Time Off** in Sage HRMS Payroll.



- If you select to calculate service as of the **Accrue Through Date**, the plan accrues to the date entered during the **Accrue Time** process. For example, if your plan is setup with a **Calculation Method** of **Accrual**, and you use the **Accrue Time** process on 2/12/2014 and enter an **Accrue Through Date** of 2/12/2014, the plan accrues through to 2/12/2014.
- If you select to calculate service as of the **End of Last Month**, the plan accrues to the last day of the prior month when you **Accrue Time**. For example, if you perform the **Accrue Time** process on 2/12/2014 and the **Accrue Through Date** entered is 2/12/2014, the plan accrues through to 1/31/2014.
- If you select to calculate service as of the **End of Current Month**, the plan accrues to the date entered during the **Accrue Time** process. For example, if you perform the **Accrue Time** process on 2/12/2014 and the **Accrue Through Date** entered is 2/12/2014, the plan accrues through to 2/28/2014.



**NOTE:** If you select **End of Current Month** here, best practice is to set up the attendance plan with the **Calculation Method** of **Lump Sum** and **Accrual Period** of **Month**. This way, when you **Accrue Time**, you can enter the last day of the month to which you want the accruals to calculate and each qualified employee receives the lump of time off as determined by their seniority.

- If you select to calculate service as of the **Previous Plan Year-End**, the plan accrues to the last day of the prior year, and the plan does not accrue time in the current plan year. If you close the plan, the accrued amount updates the previous year's carryover time. For example, if you perform the **Accrue Time** process on 2/12/2014, and your **Plan Year** is set to **Annual**, the plan accrues through to 12/31/2013.
- If you select to calculate service as of the **Current Plan Year-End**, the plan accrues to the last day of the current year. For example, if you perform the **Accrue Time** process on 2/12/2014, and your **Plan Year** is set to **Annual**, the plan accrues through to 12/31/2014.



**NOTE:** If you choose either **Previous Plan Year-End** or **Current Plan Year-End** settings for calculating service, it's best practice to always use the **Calculation Method** of **Lump Sum** on the **Attendance Plan Detail** setup (General tab).

## Sage HRMS Upgrade Process

For existing customers upgrading from Sage HRMS versions 10.1 or 2012, both your current plan settings (for **Use** and **Calculate Service as of**) and current data will be transferred to new options that preserve your current accrual calculations. To see which options default after the upgrade, refer to the **Enhancement Details** table below. No action is required.

## Enhancement Details

The improvements affect windows and processes in **Time Off** as detailed in the following table:

Sage HRMS navigation path	Window or section name	Field or option name	New field or option name	Details and how this affects your data
Employees > Tasks >	<b>Add New Hire</b>	Hire Date		Now a required field. Updates the Original Hire Date, Last Hire Date, Adjusted Seniority Date, and Time Off: Service Date fields on the <b>HR Status</b> window.
Employees > Tasks >	<b>Rehire Employee</b>	Rehire Date		Now a required field. <b>Attendance Plan</b> Start Date matches this date if your plan <b>Seniority Levels</b> are set to use the <b>Last Hire Date</b> for accrual calculations.
Employees > Tasks >	<b>Rehire Employee</b>	Adjusted Seniority Date		Now a required field. <b>Attendance Plan</b> Start Date matches this date if your plan <b>Seniority Levels</b> are set to use the <b>Adjusted Seniority Date</b> for accrual calculations.
Employees > View/Edit Employee > Personal tab >	<b>HR Status</b>	Original Hire Date		Now a required field. By default, populates with the hire date from the <b>Add New Hire</b> task.  If you edit this date, and the plan is set to <b>Use</b> the <b>Original Hire Date</b> , the <b>Start Date</b> for the employee's attendance plan also updates. Because this may affect the accrued value, you should repost transactions to summary and run the <b>Accrue Time</b> process.
Employees > View/Edit Employee > Personal tab >	<b>HR Status</b>	Last Hire Date		Now a required field. By default, populates with the hire date from the <b>Add New Hire</b> and <b>Rehire Employee</b> tasks.  If you edit this date, and the plan is set to <b>Use</b> the <b>Last Hire Date</b> , the <b>Start Date</b> for the employee's attendance plan also updates. Because this may affect the accrued value, you should repost transactions to summary and run the <b>Accrue Time</b> process.
Employees > View/Edit Employee > Personal tab >	<b>HR Status</b>	Adjusted Seniority Date		Now a required field. By default, populates with the hire date from the <b>Add New Hire</b> and <b>Rehire Employee</b> tasks.  If you edit this date, and the plan is set to <b>Use</b> the <b>Adjusted Seniority Date</b> , the <b>Start Date</b> for the employee's attendance plan also updates. Because this may affect the accrued value, you should repost transactions to summary and run the <b>Accrue Time</b> process.
Employees > View/Edit Employee > Personal tab >	<b>HR Status</b>	Vacation Service Date	<b>Time Off: Service Date</b>	We changed this field name to account for attendance plans other than vacation and it is now a required field. By default, it populates with the hire date from the <b>Add New Hire</b> and <b>Rehire Employee</b> tasks.

## Time Off

Sage HRMS navigation path	Window or section name	Field or option name	New field or option name	Details and how this affects your data
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Use</b> (drop-down menu)	Original Hire Date		If you choose this option, the <b>Start Date</b> for the plan updates on all employee <b>Attendance Summary</b> records with the corresponding date from each affected employee's <b>HR Status</b> page.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Use</b> (drop-down menu)	Last Hire Date		If you choose this option, the Start Date for the plan updates all employee <b>Attendance Summary</b> records with the corresponding date from each affected employee's <b>HR Status</b> page.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Use</b> (drop-down menu)	Adjusted Seniority Date		If you choose this option, the Start Date for the plan updates all employee <b>Attendance Summary</b> records with the corresponding date from each affected employee's <b>HR Status</b> page.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Use</b> (drop-down menu)	Vacation Service Date	<b>Time Off Service Date</b>	We changed this option name to account for attendance plans other than vacation. If you choose this option, the <b>Start Date</b> for the plan updates on all employee <b>Attendance Summary</b> records with the corresponding date from each affected employee's <b>HR Status</b> page.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Use</b> (drop-down menu)		<b>Specified Date</b>	This is a new option. If you edit this selection after creating the plan, the <b>Start Date</b> for the plan is unchanged but can be edited on all employee <b>Attendance Summary</b> records.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Use</b> (drop-down menu)	*blank	<i>(no longer available)</i>	You are no longer able to select a blank (or no) option in this drop-down menu. Upon upgrading, your existing plans with this selection will update to the <b>Specified Date</b> option, which enables the plan to calculate the same as before. No action is necessary.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	*blank	<i>(no longer available)</i>	You are no longer able to select a blank (or no) option in this drop-down menu. Upon upgrading, your existing plans with this selection will update to the <b>Accrue Through Date</b> option, which enables the plan to calculate the same as before. No action is necessary.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	Anniversary	<i>(no longer available)</i>	This option no longer exists. Upon upgrading, your existing plans with this selection will update to the <b>Accrue Through Date</b> option, which enables the plan to calculate the same as before. No action is necessary.

Sage HRMS navigation path	Window or section name	Field or option name	New field or option name	Details and how this affects your data
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	Specified Date	<i>(no longer available)</i>	This option no longer exists. Upon upgrading, your existing plans with this selection will update to the <b>Accrue Through Date</b> option, which enables the plan to calculate the same as before. No action is necessary.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	Today	<b>Accrue Through Date</b>	This option enables the plan to use the date you enter as your <b>Accrue Through Date</b> when performing the <b>Accrue Time</b> process for evaluating accrual rates.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	Next Plan Year-End	<b>Current Plan Year-End</b>	This option now evaluates seniority based on the <b>Annual</b> (calendar year), <b>Fiscal</b> , or <b>Anniversary</b> Plan Year selection from the <b>Attendance Plan</b> setup.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	End of Last Month		This option has not changed. However, the functionality now evaluates accrual rates based on seniority and the attendance plan rules. See <b>Accrual Calculations Process</b> above for examples.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	End of Current Month		This option has not changed. However, the functionality now evaluates accrual rates based on seniority and the attendance plan rules. See <b>Accrual Calculations Process</b> above for examples.
Setup > Time Off > Attendance Plans >	<b>Attendance Plans Detail &gt; Calculate Service as of</b> (drop-down menu)	Previous Plan Year-End		This option has not changed. However, the functionality now evaluates accrual rates based on seniority and the attendance plan rules. See <b>Accrual Calculations Process</b> above for examples.
Employees > View/Edit Employee > Time Off page > Attendance Summary subtab	<b>Attendance Summary</b> (after selecting one of the employee's plans)	Start Date		This field becomes both available and required only if the <b>Attendance Plans Detail &gt; Seniority Levels</b> are set to use the <b>Specified Date</b> . This field serves the same purpose as the Specified Date option that we removed from the Attendance Summary window.

Sage HRMS navigation path	Window or section name	Field or option name	New field or option name	Details and how this affects your data
Employees > View/Edit Employee > Time Off page > Attendance Summary subtab	<b>Attendance Summary</b> (after selecting one of the employee's plans)	Specified Date	<i>(no longer displayed)</i>	We removed this field from the window and the <b>Start Date</b> field now provides the same information as was previously displayed in the Specified Date field.
Employees > View/Edit Employee > Time Off page > Attendance Summary subtab	<b>Attendance Summary</b> (after selecting one of the employee's plans)	Accrued Date		Displays the last entered <b>Accrue Through Date</b> from the <b>Accrue Time</b> process. If the employee is terminated and the Accrue Through Date entered is greater than the employee's termination date, the accrual stops on the termination date. If the <b>Accrue Through Date</b> is greater than the <b>Effective To</b> date (specified on the employee's <b>Attendance Summary &gt; Accrual Summary</b> page), the plan stops accruing on the <b>Effective To</b> date and displays this same date in the <b>Accrued Date</b> field for the employee.

## Modifications

### Accrual by Service Date

Previously, when setting up an Attendance Plan in Sage HRMS, the **Calculate Service As Of** date setting incorrectly adjusted the seniority values for employees with the plan. The seniority or service date is specified by the **Use** and **Calculate Service As Of** option of **Accrued Through Date** values. These settings are now respected when the system determines the seniority level for accruing time, so the accruals can correctly calculate from the adjusted seniority years and months of service. (15785)

### Attendance Plan Descriptions and IDs

If you have multiple attendance plans with similar descriptions, you may have experienced an issue with the plan ID and Description display when viewing the **Employee Attendance Summary** details. The **Description** field on the **Employee Attendance Summary** window continues to correctly display the information. After installing this release, when you edit the plan, the plan ID and Description are also correctly displayed in the **Attendance Plan** information section of the window. (14654)

### Reset Current Accrual Year Process

When using the **Reset Current Accrual Year** process, some customers received an error message (*Runtime Error: m\_scan line 73. Array dimensions are invalid. Error 230. USE IN prpaycus*) and were required to restart Sage HRMS. With this release, the issue that caused the error message is resolved and you can now successfully use the process. (15872)

# Payroll

## Enhancements

### Custom Utilities in the Process Payroll Map

You now have the option to customize the **Process Payroll** map in Sage HRMS 2014 to add custom utilities and applications, such as reports, websites, and executable files (.exe), in addition to the usual Sage HRMS processes and tasks. To modify the default Process Payroll map:

1. First add your utilities to the **Quick Launch** from **System > Customize Menu**.



**NOTE:** For step-by-step instructions, read the Sage HRMS Help topics for *Customize the Quick Launch Toolbar* and *Customize the Process Payroll Map*.

2. Next, select **System > Customize Process Payroll** from the navigation pane.
3. Select the Payroll **Group**, and Quick Launch from **Submenu**.
4. Select the applicable **Button** from the drop-down menu.
5. Select the utility or application from the **Available** list and click the **Add** button. Use the **Move Up** and **Move Down** buttons to sort the processes to suit your payroll processing workflow.

### Automatic Tax Rate Update Option

Sage HRMS 2014 offers a new automated update option for Local/Other Tax Codes rates supplied from Sage to the Sage HRMS Payroll U.S. version product. After upgrading to Sage HRMS 2014 and each time you apply a quarterly tax update, the system will prompt you so you can immediately and automatically apply rate changes to the supported tax codes currently in your Sage HRMS Payroll program. You can also automatically push the new rates to the tax codes on each employee record. If you prefer to suspend the automatic updates and instead update the new tax rates individually, you have the option to continue using existing functionality by clicking **No** when the system prompts you to automatically update tax rates.

### Cost Center Overrides on Timecard Imports

When importing a timecard, Sage HRMS Payroll now also includes the importing of Cost Center Overrides. The timecard import automatically updates the G/L segment corresponding to each Cost Center override. This matches the way the system already handles manually entered information in the timecards.

## Modifications

### Accrual Amounts in Payroll Employee Activity

The **Account Summary** accrued values for Attendance Plan accruals may not have always agreed with the **Payroll Activity Accrual** accrued value after calculating payroll prior to this release. A fix has been applied so that the amounts from Time Off now correctly update the **Hours/Amt Accrued** field on the employee's **Employees > View/Edit Employee > Payroll > Employee Activity > Accruals** window.

## Leave of Absence Employee Status

When assigning an employee to a Leave of Absence status, the system no longer automatically changes the employee's **Status** to **Inactive** on the **Class/Schd** tab (from **Employees > View/Edit Employee > Payroll > Employee Payroll**). The Conversely, when returning an employee from the Leave of Absence, the system no longer automatically changes the employee's Status to **Active**.(15632)

## Canadian Payroll: Synchronize Pay History

Previously, the **Synchronize Pay History** option was not available if only Sage HRMS Canadian Payroll was installed, but this has been corrected and the option is available from both the navigation pane and the menu bar. (15300)

## Quarterly Wage on Disk Window

With the recent enhancement for Sage Payroll Tax Forms and eFiling by Aatrix supporting the Pennsylvania PSD reporting, there is no longer a need for the Quarterly Wage on Disk window and it has been removed from Sage HRMS 2014. (15754)

# Sage Employee Self Service

## Enhancements

### Employee Names and Case-Sensitivity

Sage Employee Self Service now allows employees to create user accounts entering their first and last names using a combination of uppercase and lowercase letters; this includes variations from the employees' names as stored in Sage HRMS. This enhancement allows you to list your employee names in all capital letters, if that is your preference for core data, in Sage HRMS even if Sage ESS is in use.

### Benefit Savings Plans Groups Requirements

To support and in order to use the new [Benefit Savings Plans Groups](#) feature in Sage HRMS 2014, you are required to have the latest version of Sage Employee Self Service installed. If your Sage ESS version is 2012 or older, you will not be able to use the feature until you have upgraded your system. Attempting to use Benefits Savings Plans Groups will generate a warning message about the required upgrade.

## Modifications

### Open Enrollment and Life Event Waived Coverage Dates

The Open Enrollment and Life Event process from the Benefits Detail window now updates Sage HRMS with the employees' waive dates, including when an employee has previously waived coverage and the plan was inactivated from the last enrollment period. This means that the end date is updated within the plan as well as the actual waived-coverage date. (15538, 15539)

### Open Enrollment and Life Event Employee Contributions

Your employees can now change their benefit contribution amounts to 0.0% (such as for a 401(k) plan) during Open Enrollment and a Life Event. When approved, the information transfers to Sage HRMS without terminating the employee from the benefit plan. (6346)

### Open Enrollment and Life Event Beneficiaries Access

Sage ESS and Open Enrollment now respect security settings for the Beneficiaries section. To deny access to beneficiaries, the system can be set to **No Access** on the **Dependents/Beneficiaries** page of Sage ESS. (15625)

### Dependents and Beneficiaries for Multiple Employees

Sage ESS and Open Enrollment now allow for the same dependent or beneficiary to be added to more than one employee. This removes a prior restriction that required social security numbers (and social insurance numbers for Canadian employees) to be unique for each dependent and beneficiary. (15770)

## Custom URLs are No Longer Case Sensitive

When adding custom URL links to Sage ESS, the URL text is no longer case sensitive. This allows for more versatility in the addition of links to other Sage and non-Sage websites. (15621)

## Email Address Change Approval Requests

Sage Employee Self Service now sends a single approval request for each individual change to supervisor email addresses. Prior versions of Sage ESS would send an approval request per employee that reported to the supervisor, requiring approval for each employee record change. Upon installing this product release, the single approval request is sent and the single supervisor update applies to each employee record reporting into the supervisor.(15579)

# System

## Enhancements

### Supported Operating Systems

With this release, Sage HRMS and Sage Employee Self Service are now supported for Microsoft Windows® 2012 and Microsoft SQL Server® 2012 (Standard, Express, and Enterprise Editions) in addition to the previously supported Microsoft Windows Server 2003, and Microsoft Windows Server 2008. You can learn more about Sage HRMS Hardware and Software Recommendations on the [Sage HRMS Product Documentation website](#), also linked from the Help menu within your program.

At this time, the View Builder module of Sage Employee Self Service is not supported with Microsoft Server® 2012.



**IMPORTANT:** Please read the *Sage Employee Self Service v2014 Pre-Installation Guide* available on the [Sage HRMS Product Documentation](#) website for detailed instructions before installing the product on Microsoft Windows® 2012 and Microsoft SQL Server® 2012.