



Sage HRMS

Sage 100 Standard ERP Link

User Guide

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Table of Contents

Install the Sage 100 Standard ERP Link	5
Start the Sage 100 Standard ERP Link.....	5
Define the Sage 100 ERP System Location.....	5
Set Up Sage 100 Standard ERP Link	7
Map Employers	7
Interface with Time Off	9
Map Benefit Plans to Deduction Codes	11
How Benefit Information is Transferred.....	12
Map Organization Codes to Department Numbers.....	13
Map Job Codes to Labor Codes.....	14
Map Absence Reasons to Earning Codes.....	15
Refresh Sage HRMS Code Tables	16
Sage 100 ERP Payroll to Sage HRMS Transfer.....	17
Use the Sage 100 ERP Payroll Setup Page	19
Refresh Sage HRMS Code Tables	19
Use the Sage 100 ERP Payroll Setup page	19
Validate Employee Numbers	24
Transfer.....	26
Sage HRMS to Sage 100 ERP Payroll Data Transfer.....	26
Sage 100 ERP Payroll to Time Off.....	27
Sage 100 ERP Payroll to Sage HRMS Transfer	29
Reports	31
Audit Reports	31
Setup Reports.....	32
Index	34

Overview

The Sage 100 Standard ERP Link enables you to transfer data between Sage HRMS and Sage 100 Standard ERP. The link consists of three data transfer processes, an employer and code mapping page, a detail page for maintaining Sage 100 ERP Payroll information, a data refresh utility, and several reporting options.

The three data transfer processes and their uses are described below.

- [Sage 100 ERP Payroll to Sage HRMS Transfer](#)

This enables you to transfer employee data from Sage 100 ERP Payroll to Sage HRMS. You can use this process to initially populate your Sage HRMS system with employees. Thereafter, you can maintain all employee information in Sage HRMS and transfer changes to Sage 100 ERP Payroll as needed, using the Sage HRMS to Sage 100 ERP transfer process.

- [Sage HRMS to Sage 100 ERP Payroll](#)

This enables you to transfer employee data from Sage HRMS to Sage 100 ERP Payroll. You can use this process to initially populate your Sage 100 ERP system with employees. You can also update existing employee data in Sage 100 ERP with changes that have been made in Sage HRMS. Basic employee data as well as insurance and savings benefit information is transferred.

- [Sage 100 ERP Payroll to Time Off](#)

This enables you to transfer absence transactions from Sage 100 ERP Payroll to Time Off.

Getting Started

Prior to installing the Sage 100 Standard ERP Link, you must complete the following preparation steps:

- Back up your Sage HRMS and Sage 100 ERP systems using external backup procedures.
- Install and set up Sage HRMS 10.1 or higher. This involves installing the software, setting up the enterprise, adding and setting up your employers, and setting up related code tables.
- Install and set up Sage 100 ERP.

After completed, you can install the Sage 100 Standard ERP Link.

Install the Sage 100 Standard ERP Link

The Sage 100 Standard ERP Link is included with your Sage HRMS application. When you first install Sage HRMS, you have the opportunity to also install the link. When the link is installed, it is available on the Quick Launch toolbar.

If you want to add Sage 100 Standard ERP Link at another time, you can do so right from within the Sage HRMS application.

Refer to **Register Your Software** for installation instructions.

Start the Sage 100 Standard ERP Link


Access the Sage 100 Standard ERP Link from the Quick Launch toolbar in Sage HRMS.


1. Click the **Links** button on the Quick Launch toolbar.
2. Click the **Sage 100 Standard ERP Link** icon. The link opens.

Note: The first time you access the link, you will be prompted to select the location of your Sage 100 ERP Payroll system.

Define the Sage 100 ERP System Location

Before you can access any other Sage 100 Standard ERP Link options, you must define the location of your Sage 100 ERP System files.

1. From the Sage 100 Standard ERP Link menu, select **Setup > System Location**. The System Location dialog box opens.
2. In the **Sage 100 ERP Location** field, click the  button to find the folder where your Sage 100 ERP program files are located. The Sage 100 ERP Location is the folder where the Sage 100 ERP program files are located. The Sage 100 Standard ERP Link uses this information to find the related Sage 100 ERP files.

3. In the **Sage HRMS Data Location** field, click the  button to find the folder where your Sage HRMS data files are located. The **Sage HRMS Data Location** is the folder where the Sage HRMS data files are located. The Sage 100 Standard ERP Link uses this information to find the related Sage HRMS data files.
4. Click **OK** to return to the Sage 100 Standard ERP Link menu.

Next Step

After you have completed the installation, you must set up the Sage 100 Standard ERP Link before you can begin using the data transfer processes.

Set Up Sage 100 Standard ERP Link

After you have installed the Sage 100 Standard ERP Link, you must perform certain setup procedures before you can begin transferring data. Setup involves the following steps:

- Map your Sage HRMS employers to your Sage 100 ERP Payroll employers.
- Map Benefit Plans to Deduction Codes. The benefit plans (insurance plans and savings plans) in Sage HRMS must be mapped to the corresponding deduction codes in Sage 100 ERP Payroll.
- Map Organization Codes to Department Numbers. The organization codes for the Organization Level you selected in Sage HRMS must be mapped to the department numbers in Sage 100 ERP Payroll.
- Map Job Codes to Labor Codes. You have the ability to map job codes in Sage HRMS to the corresponding labor codes in Sage 100 ERP Payroll. This step is not required. However, if you have mapped any job codes, we strongly recommend you continue mapping all of the job codes. Mapping only some of the job codes may create undesirable results and is not supported.
- Map Absence Reasons to Earning Codes. The absence reasons in Time Off must be mapped to the corresponding earnings codes in Sage 100 ERP Payroll.
- Refresh Sage HRMS Code Tables.

Map Employers

You must map each Sage HRMS employer to a Sage 100 ERP Payroll employer. When you use the data transfer processes, information will be transferred between the employers you have mapped together.

Tip: You can only map employers in a one to one relationship. That is, you cannot map one Sage HRMS employer to more than one Sage 100 ERP Payroll employer. Similarly, you cannot map one Sage 100 ERP Payroll employer to more than one Sage HRMS employer. For example, if the Sage 100 ERP Payroll employer ABC is mapped to the Sage HRMS employer ZSI, no other relationship may be established for the ABC employer or the ZSI employer.

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping > Employer Mapping**. The Employer Mapping page opens
2. Click **Add**. The Employer Mapping Detail page opens. Select the Sage HRMS employer from the drop-down list.
3. Select the corresponding Sage 100 ERP Payroll Employer from the drop-down list.
4. If you want to use the Sage 100 ERP to Time Off transfer process, select the Interface with Time Off check box. Refer to Interface with Time Off for more information about the Attendance option.
5. Click the arrow adjacent to Earnings Types for Benefit Date. The Earnings Types page opens.

6. Select one or more Earnings Types for Time Off Absence Transactions. Generally, these would include the earnings types of Vacation Pay and Sick Pay.
7. Click **OK**.

Tips:

- Each Sage 100 ERP earnings code you select for transfer must have a corresponding absence reason code setup in Time Off.
 - In Sage 100 ERP, earnings types appear in the **Type of Earnings** field on the Earnings Code Maintenance screen. To review the earnings codes in Sage 100 ERP and their associated types, select **Payroll > Setup > Earnings Code Maintenance**, then click the Printer button to print a report.
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8. Select from the Sage 100 ERP Review Date Equals drop-down list to indicate whether you want the Review Date in Sage 100 ERP to equal the Next Review date or the Next Pay Review date in Sage HRMS.

For example, let's say you select **Next Review**. When you transfer an employee from Sage HRMS to Sage 100 ERP Payroll, the contents of the **Next Review** field in Sage HRMS will be used to populate the **Review Date** field in Sage 100 ERP Payroll. If you transfer an employee from Sage 100 ERP Payroll to Sage HRMS, the reverse occurs.

Tips:

- In Sage HRMS, the **Next Review** and **Next Pay Review** fields are located on the **Pay and Performance** tab of the **Current Pay** page.
 - In Sage 100 ERP, the **Review Date** field is found on the Main tab of the **Payroll > Main > Employee Maintenance** window.
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9. Select from the Sage 100 ERP Hire Date Equals drop-down list to indicate whether you want the Hire Date in Sage 100 ERP to equal the Original Hire Date or the Last Hire Date in Sage HRMS.

Tips:

- In Sage HRMS, the **Original Hire** and **Last Hire Date** fields are located on the HR Status page. In Sage 100 ERP, the **Hire Date** field is found on the **Main** tab of the **Payroll > Main > Employee Maintenance** page.
 - The Status area of each page in Sage HRMS displays the **Last Hire Date** next to the employee's name.
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10. From the Sage HRMS Organization Level drop-down list, select to which Sage HRMS organization levels you want to map each Sage 100 ERP department.
11. Click **OK** to save your changes and return to the Employer Mapping page. If you need to map additional employers, repeat steps 2 through 11. Remember to map each employer only once.

Edit and Delete Mappings

You can edit or delete any of the existing mappings.

To Edit a Mapping

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping** and the code types with which you want to work. The appropriate page opens.
2. From the **Mapping** drop-down list, select the code types with which you want to work.
3. From the **Employer** drop-down list, select the linked employers for which you want to edit mapped codes.
4. Highlight the mapping you want to edit and click **More....** The detail page for the mapped code you selected opens.
5. Edit the information and click **OK** to save the revised mapping.

To Delete a Mapping

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping** and the code types with which you want to work. The appropriate page opens.
2. From the **Mapping** drop-down list, select the code types with which you want to work.
3. From the **Employer** drop-down list, select the linked companies for which you want to delete mapped codes.
4. Highlight the mapping you want to remove and click **Delete**.

Interface with Time Off

Prior to using the Sage 100 ERP Payroll to Time Off transfer process, you must Set Up the Sage 100 Standard ERP Link.

Payroll Data Entry

If you check the **Interface with Time Off** check box when mapping employers, the system adds a new field called **Benefit Date** to the Payroll Data Entry page in Sage 100 ERP Payroll. This field is only enabled for the Earnings Types for Time Off Absence Transactions you selected on the Earnings Types page.

To locate the **Benefit Date** field in Sage 100 ERP Payroll, select **Payroll > Main > Payroll Data Entry**. Select a pay cycle and a standard earnings code and click **OK**. On the Payroll Data Entry window, select an employee, then go to the **Lines** tab. Click the **Add** button to open the **Benefit Date by Earnings Line** dialog box.

The **Benefit Date** field defaults to blank. However, you must enter a benefit date. When you transfer data from Sage 100 ERP to Time Off, the **Benefit Date** field is used as the date of the absence transaction in Time Off. For more information about mapping employers, see Set Up the Sage 100 Standard ERP Link.

Payroll Data Entry Audit Report

The Benefit Date will print on the Payroll Data Entry Audit Report. For each employee, earnings will be sorted by the Benefit Date. Earnings that do not include a Benefit Date will print before those that do. The **Hours** and **Amount** fields will subtotal by Benefit Date, if more than one earnings line is printed for that date. No other payroll reports will print this date, nor will it appear on check forms or direct deposit stubs.

Check Register Update

During the update of the Check Register, a temporary file will be created containing the attendance transactions that will be transferred to Time Off when you run the transfer process. The Sage HRMS Transfer Log report shows the following data will be produced: Employee Number, Benefit Date, Earnings Code and Description, Earnings Type, and Hours.

Map Data

Certain fields in Sage HRMS have the same or similar meaning as fields in Sage 100 ERP. The Sage 100 Standard ERP Link automatically links these fields when data is transferred between the two systems.

Other fields must be mapped manually before data is transferred. Field mapping includes benefit plans to deduction codes, organizations to department codes, job codes to labor codes, and absence reasons to earnings codes.

Automatic Mapping

Review the Sage HRMS and Sage 100 ERP Payroll fields that are automatically mapped together. These mappings cannot be changed.

For example, when an employee is transferred from Sage HRMS to Sage 100 ERP Payroll, the values in the **City**, **State**, and **Zip Code** fields on the employee's Demographics page are automatically transferred to the **City**, **State**, and **Zip Code** fields on the Employee Maintenance screen in Sage 100 ERP Payroll. When an employee is transferred from Sage 100 ERP Payroll to Sage HRMS, the reverse occurs.

Note: The Hire Date in Sage 100 ERP Payroll can be mapped to either the **Original Hire Date** or the **Last Hire Date** fields in Sage HRMS, and the Review Date in Sage 100 ERP Payroll can be mapped to either the **Next Review** or the **Next Pay Review** date fields in Sage HRMS. For more information on mapping these fields, see Map Employer.

Manual Mapping

Before transferring data between Sage HRMS and Sage 100 ERP Payroll, you need to manually map the following:

- Map Benefit Plans to Deduction Codes. The benefit plans (insurance plans and savings plans) in Sage HRMS must be mapped to the corresponding deduction codes in Sage 100 ERP Payroll.

- Map Organization Codes to Department Numbers. The organization codes for the Organization Level you selected in Sage HRMS must be mapped to the department codes in Sage 100 ERP Payroll.
- Map Job Codes to Labor Codes. You have the ability to map job codes in Sage HRMS to the corresponding labor codes in Sage 100 ERP Payroll. This step is not required. However, if you have mapped any job codes, we strongly recommend you continue mapping all of the job codes. Mapping only some of the job codes may create undesirable results and is not supported.
- Map Absence Reasons to Earning Codes. The absence reasons in Time Off must be mapped to the corresponding earnings codes in Sage 100 ERP Payroll.

Note: If no specific codes exist at employer level, the system will default to the codes at the enterprise level. So the Sage HRMS codes you see in the drop-down boxes will apply to this situation.

Map Benefit Plans to Deduction Codes

You should map benefit plans to deduction codes before using the following transfer process:

- Sage HRMS to Sage 100 ERP Payroll

Tips:

- To locate the benefit plans in Sage HRMS, from the Navigation Pane, select **Reports > Employees > Code Table Reports**. Run the Benefit Insurance Plans report and the Benefit Savings Plans report.
 - To locate the deduction codes in Sage 100 ERP, select **Payroll > Setup > Deduction Code Maintenance**. Click the **Printer** button to print a report.
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To Map Benefit Codes to Deduction Codes

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping > Benefit Plan > Deduction Code**. The Benefit Plan / Deduction Code Mapping page opens.
2. From the **Mapping** drop-down list, select the code types you want to map.
3. From the **Employer** drop-down list, select the linked employers for which you want to map codes.
4. To add a mapping, click **Add**. The Benefit Plan / Deduction Code Mapping Detail page opens.
5. From the **Sage HRMS Benefit Plan** drop-down list, select the Sage HRMS savings or insurance plan.
6. From the drop-down list, select the corresponding Sage 100 ERP Payroll Deduction Code. If there is only one deduction in Sage 100 ERP associated with the benefit plan, leave the **Sage 100 ERP Payroll Employer Contribution Code** field blank. This field is only used when the benefit plan has an employer match.

For example, let's say you have a 401(k) savings plan in Sage HRMS called 401K(%) – 401K Savings Plan (%). In Sage 100 ERP Payroll, the employee contribution for the 401(k) plan is represented by deduction code 06 – 401k Plan and the employer contribution is represented by deduction code 05 - Savings. Select 401K(%) – 401K Savings Plan (%) from the Sage HRMS Benefit Plan list, then select 06 – 401k Plan as the Sage 100 ERP Payroll Deduction Code and 05 - Savings as the Sage 100 ERP Payroll Employer Contribution Code.

Note: Map each Sage HRMS Benefit Plan code to only one Sage 100 ERP Payroll Deduction code.

7. Click **OK** to save the mapping and close the Benefit Plan / Deduction Code Mapping Detail page.
8. Repeat steps 4 through 7 for each benefit plan.
9. When you are finished mapping benefit plans to deduction codes, run the Benefit Plan / Deduction Code Setup Report (from the Sage 100 Standard ERP Link Main Menu, select **Reports > Setup Reports > Benefit Plan/Deduction Code**) to show all current mappings.

How Benefit Information is Transferred

When you use the Sage HRMS to Sage 100 ERP Payroll transfer process, the link determines which benefit plans have been activated for employees in Sage HRMS. Automatic voluntary deductions are then assigned to the employees in Sage 100 ERP Payroll, using the deduction codes mapped to the plan and the amount or percentage rate in Sage HRMS.

When transferring an employee from Sage HRMS to Sage 100 ERP Payroll, the system uses the Contribution Amount, Employee Contribution Frequency and Employee Pay Frequency to convert the Sage HRMS Benefit Employee Contribution Amount to an accurate Sage 100 ERP Payroll Employee Deduction Amount.

For example, an employee is paid biweekly and is enrolled in an HMO plan with an employee contribution amount of \$63.50 per month (\$762.00 annually). When you run the transfer process, the system converts the employee contribution amount to a biweekly payroll deduction amount of \$29.31.

Note: If the contributions for a Sage HRMS savings plan are based on percentage of gross wages, you must ensure that the corresponding deduction code in Sage 100 ERP Payroll is set up with a calculation method of Percentage of Gross.

During subsequent transfer of data from Sage HRMS to Sage 100 ERP Payroll, if any of an employee's Sage HRMS benefit plans have expired, the Sage 100 ERP Payroll deductions linked to the inactive benefit plans will be changed to "not automatic." As a result, the deductions will not be automatically withheld from the employee. Deductions in Sage 100 ERP Payroll that are not linked to Sage HRMS benefit plans will remain unchanged.

Note: When you need to deactivate an insurance benefit in Sage HRMS, use the Expire Benefit feature on the employee's Insurance Benefits page to completely cancel the benefit for the employee and the employee's dependents. Click Expire Benefit to open the Expire Benefit dialog box. In the Coverage Expiration Date field, enter the date you wish to expire the benefit and click OK. To expire a savings benefit, enter an Expiration Date on the employee's Savings Benefits page. When data is transferred, if the expiration date is earlier than the transfer date, the associated deductions in Sage 100 ERP will become "not automatic." Do not deactivate a benefit by deleting it; if you do so, the transfer process will not deactivate the associated deductions in Sage 100 ERP.

To locate an employee's benefit plans in Sage HRMS, from the Navigation Pane, select **Employees > View/Edit Employee (select an employee) > Benefits tab > Insurance Benefits (or Savings Benefits)**. To locate an employee's deductions in Sage 100 ERP, select **Payroll > Main > Employee Maintenance**, then click the **Deductions** button.

Map Organization Codes to Department Numbers

You must map organization codes to department codes before using the following transfer processes:

- Sage 100 ERP Payroll to Sage HRMS Transfer
- Sage HRMS to Sage 100 ERP Payroll

Tips:

- To locate the organization levels in Sage HRMS, from the Navigation Pane, select **Setup > System > Enterprise Setup**, then click the **Organization Titles** tab. To locate the codes associated with each organization level, from the Navigation Pane, select **Reports > Employee > Code Table Reports**, then run the Organization Codes report.
 - To locate the department codes in Sage 100 ERP, select **Payroll > Setup > Department Maintenance**. Click the **Print** button to print a report.
-

To Map Organization Codes to Department Codes

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping/Organization Code > Department Code**. The Organization Code / Department Code Mapping page opens.
2. From the **Mapping** drop-down list, select the code types you want to map.
3. From the **Employer** drop-down list, select the linked employers for which you want to map codes.
4. To add a mapping, click **Add**. The Organization Code / Department Code Mapping Detail page opens.
5. Select the **Sage HRMS Organization Code** from the list. These codes represent the organization level selected in the **Sage HRMS Organization Level** field on the Employer Mapping Detail page. For more information about the Employer Mapping Detail page, refer to Map Employers.

6. From the drop-down list, select the corresponding **Sage 100 ERP Payroll Department Code**.

Note: Map each Sage HRMS Organization Code to only one Sage 100 ERP Department Code.

7. Click **OK** to save the mapping and close the Organization Code / Department Code Mapping Detail page.
8. Repeat steps 4 through 7 for each organization code.
9. When you are finished mapping organization codes to department codes, run the Organization Code / Department Code Setup Report (from the Sage 100 Standard ERP Link Main Menu, select **Reports > Setup Reports > Organization Code / Department Code**) to show all current mappings.

Map Job Codes to Labor Codes

You are not required to map job codes in Sage HRMS to the corresponding labor codes in Sage 100 ERP Payroll. However, if you have mapped any job codes, we *strongly recommend* you continue mapping all of the job codes. Mapping only some of the job codes may create undesirable results and is not supported.

Before you start to map job codes to labor codes, you must select to validate job codes in Sage HRMS. From the Main Menu, select **Rules > HR > HR Setup**, then click the **HR Options** tab. Click **Yes** to enable job code validation.

Tips:

- To locate the job codes in Sage HRMS, from the Navigation Pane, select **Reports > Employees > Code Table Reports**. Run the Job Codes report.
 - To locate the labor codes in Sage 100 ERP, select **Payroll > Setup > Labor Code Maintenance**. Click the **Print** button to print a report.
-

To Map Job Codes to Labor Codes

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping > Job Code/Labor Code**. The Job Code/Labor Code Mapping page opens.
2. From the **Mapping** drop-down list, select the code types you want to map.
3. From the **Employer** drop-down list, select the linked employers for which you want to map codes.
4. To add a mapping, click **Add**. The Job Code/Labor Code Mapping Detail page opens.
5. Select the **Sage HRMS Job Code** from the drop-down list, then select the corresponding **Sage 100 ERP Payroll Labor Code**.

Note: You can map as many Sage HRMS Job Codes to one Sage 100 ERP Payroll Labor Code as necessary.

6. Click **OK** to save the mapping and close the Job Code/Labor Code Mapping Detail page.
7. Repeat steps 4 through 6 for each job code.
8. When you are finished mapping job codes to labor codes, run the Job Code / Labor Code Setup Report (from the Sage 100 Standard ERP Link Main Menu, select **Reports > Setup Reports > Job Code/Labor Code**) to show all current mappings.

Map Absence Reasons to Earning Codes

You must map absence reason codes to earning codes before using the following transfer process:

- Sage 100 ERP Payroll to Time Off

Tips:

- To locate the absence reasons in Time Off, from the Navigation Pane, select **Reports > Time Off > Code Table Reports**. Run the Absence Reason Codes report.
 - To locate the earning codes in Sage 100 ERP, select **Payroll > Setup > Earnings Code Maintenance**. Click the **Print** button to print a report.
-

To Map Absence Reasons to Earnings Codes

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping/Absence Reason > Earning Code**. The Absence Reason / Earning Code Mapping page opens.
2. From the **Mapping** drop-down list, select the code types you want to map.
3. From the **Employer** drop-down list, select the linked employers for which you want to map codes.
4. To add a mapping, click **Add**. The Absence Reason / Earning Code Mapping Detail opens.
5. Select the **Sage HRMS Absence Reason Code** the drop-down list.
6. Select the corresponding **Sage 100 ERP Payroll Earning Code**. The earning code you select must have one of the earnings types you selected as an Earnings Types for Time Off Absence Transactions when you mapped employers.

Note: Map each Sage HRMS Absence Reason to only one Sage 100 ERP Payroll Earning Code.

7. Click **OK** to save the mapping and close the Absence Reason / Earning Code Mapping Detail page.
8. Repeat steps 4 through 7 for each absence reason code.
9. When you are finished mapping absence reason codes to earning codes, run the Absence Reason / Earning Code Setup Report (from the Sage 100 Standard ERP Link Main Menu, select **Reports > Setup Reports > Absence Reason > Earning Code**) to show all current mappings.

Edit and Delete Mappings

You can edit or delete any of the existing mappings.

To Edit a Mapping

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping** and the code types with which you want to work. The appropriate page opens.
2. From the **Mapping** drop-down list, select the code types with which you want to work.
3. From the **Employer** drop-down list, select the linked employers for which you want to edit mapped codes.
4. Highlight the mapping you want to edit and click **More....** The detail page for the mapped code you selected opens.
5. Edit the information and click **OK** to save the revised mapping.

To Delete a Mapping

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Employer and Code Mapping** and the code types with which you want to work. The appropriate page opens.
2. From the **Mapping** drop-down list, select the code types with which you want to work.
3. From the **Employer** drop-down list, select the linked companies for which you want to delete mapped codes.
4. Highlight the mapping you want to remove and click **Delete**.

Refresh Sage HRMS Code Tables

The Refresh Sage HRMS Code Tables process transfers values from Sage 100 ERP Payroll to Sage HRMS. These values appear in the drop-down lists on the Sage 100 ERP Payroll Setup page.

Note: Use Sage 100 ERP Payroll to add, edit or delete codes. When new values are added, edited, or deleted in Sage 100 ERP Payroll, Sage HRMS is not automatically updated. You must use the Refresh Sage HRMS Code Tables process.

You must run the Refresh Sage HRMS Code Tables process:

- Before beginning the data transfer processes.
- To update Sage HRMS so that the most current values appear on the Sage 100 ERP Payroll Setup page. This process transfers values for all Sage 100 ERP Payroll employers that are mapped to Sage HRMS employers.

To Refresh Sage HRMS Code Tables

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Refresh Sage HRMS Code Tables**.

2. The process begins and requires no other action on your part. A message informs you when the process is complete. Click **OK**.

Sage 100 ERP Payroll to Sage HRMS Transfer

Use the Sage 100 ERP Payroll to Sage HRMS Transfer process to initially populate your Sage HRMS system with employees.

Note: Use the Sage 100 ERP Payroll to Sage HRMS Transfer process *only once* to initially populate your Sage HRMS system with employees. Thereafter, maintain all employee information in Sage HRMS and transfer changes to Sage 100 ERP Payroll as needed, using the Sage HRMS to Sage 100 ERP Payroll transfer process. Transferring employees from Sage 100 ERP Payroll to Sage HRMS more than once may create undesirable results and is not supported.

New employees should be entered into Sage HRMS using the Add New Employee task and then transferred from Sage HRMS to Sage 100 ERP Payroll.

Note: During the first employee transfer from Sage 100 ERP Payroll to Sage HRMS, the reason code "Sage 100 ERP" will be transferred as the Reason code. When you open the Current Job page for a transferred employee, this code will appear in the Change Reason field as "Sage 100 ERP-Not in code table." At this point, you can do one of the following:

- Leave the code as is.
- Go to the Reasons code table (from the Sage HRMS Navigation Pane, select **Setup > Employees > Code Tables > Reason Codes**) and add an appropriate description for the "Sage 100 ERP" code.
- Select **Add New Code** from the **Change Reason** drop-down list on the Current Job page and add an appropriate description for the "Sage 100 ERP" code.

Follow these steps to transfer data from Sage 100 ERP Payroll to Sage HRMS:

1. Map all appropriate values using the Employer and Code Mapping page, as described in Set Up the Sage 100 Standard ERP Link. This step only needs to be completed one time, prior to the first data transfer.
2. Use the Sage 100 ERP Payroll to Sage HRMS transfer process to transfer employee data, as described in this section.

Data to Be Transferred

When you transfer data from Sage 100 ERP Payroll to Sage HRMS, the contents of fields that are mapped together are transferred from one system to the other. For more information about mapped fields, see Set Up the Sage 100 Standard ERP Link.

To Transfer Data from Sage 100 ERP Payroll to Sage HRMS

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Sage 100 ERP Payroll to Sage HRMS Transfer**. The Transfer Sage 100 ERP Payroll to Sage HRMS page opens. The date of the last transfer is displayed at the bottom of the page.
2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked companies for which you want to transfer employees.
3. Indicate whether you want to transfer all employees or specific employees. Click the arrow adjacent to Select Employees. The Select Employees dialog box opens. The Available list shows all employees in Sage 100 ERP Payroll.
4. From the Available list box, double-click the employees you want to include in the transfer. The selected employees appear in the right list box. If you want to remove an employee from the list, highlight the employee name and click Remove.
5. Click **OK**.
6. If you want the transfer to include terminated employees, place a check in the **Include Terminated Employees** check box. Otherwise, leave the check box blank.
7. Indicate whether you want to run the Audit Report before you transfer employees, run the Audit Report only or transfer employees only. The audit report shows you separate report sections for New Employees, Modified Employees and Invalid Employees when applicable. Review the audit report and make the necessary changes before proceeding.

Note: We *strongly recommend* you review the Audit report to ensure the accuracy of your information before proceeding with the employee transfer

8. Click **OK**. The system asks you to confirm the transfer. Click **Yes** to confirm the transfer, or click **No** to cancel the transfer.
9. A message informs you when the transfer is complete. Click **OK**.
10. From the Sage HRMS Navigation Pane, select **Employees > Processes > Import Calculations**. The system automatically updates any remaining fields that were not imported during the Sage 100 ERP Payroll to Sage HRMS transfer.
11. Click **OK** when the Import Calculations process is complete.
12. If Sage HRMS is set up to automatically add benefits to all active employees, you must run the Update Benefits process.
13. Click **OK** when the Update Benefits process is complete.

Use the Sage 100 ERP Payroll Setup Page

Refresh Sage HRMS Code Tables

The Refresh Sage HRMS Code Tables process transfers values from Sage 100 ERP Payroll to Sage HRMS. These values appear in the drop-down lists on the Sage 100 ERP Payroll Setup page.

Note: Use Sage 100 ERP Payroll to add, edit or delete codes. When new values are added, edited, or deleted in Sage 100 ERP Payroll, Sage HRMS is not automatically updated. You must use the Refresh Sage HRMS Code Tables process.

You must run the Refresh Sage HRMS Code Tables process:

- Before beginning the data transfer processes.
- To update Sage HRMS so that the most current values appear on the Sage 100 ERP Payroll Setup page. This process transfers values for all Sage 100 ERP Payroll employers that are mapped to Sage HRMS employers.

To Refresh Sage HRMS Code Tables

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Refresh Sage HRMS Code Tables**.
2. The process begins and requires no other action on your part. A message informs you when the process is complete. Click **OK**.

Use the Sage 100 ERP Payroll Setup page

When you install the Sage 100 Standard ERP Link, a new detail page is added to Sage HRMS.

The Sage 100 ERP Payroll Setup page allows you to enter employee payroll data that is required prior to transferring employees from Sage HRMS to Sage 100 ERP Payroll. All information entered here can be transferred to Sage 100 ERP to set up the employee's payroll. You can then continue to maintain all required employee information from Sage HRMS, transferring to Sage 100 ERP Payroll as needed.

You should use the Sage 100 ERP Payroll Setup page to enter employee payroll data before using the Sage HRMS to Sage 100 ERP Payroll transfer process.

To Use the Sage 100 ERP Payroll Setup page

1. Use the Refresh Sage HRMS Code Tables to refresh data that may have been updated in Sage 100 ERP Payroll.
2. From the Navigation Pane, select **Employees > Tasks > View/Edit Employee**.
3. Find an employee and then select **Job and Pay** in the Toolbar menu to open the Job and Pay window.

- Click the **Sage 100 ERP Payroll Setup** icon to open the Sage 100 ERP Payroll Setup window.

Note: If the window displays an employee from a Canadian employer, all fields are disabled.

- For each employee, enter all necessary information, then click Apply to save your changes and remain on the window, or click OK to save your changes and close the window.

The Sage 100 ERP Payroll Setup page contains four tabs: **Payroll Status**, **Federal Tax**, **State Tax**, and **Local Tax**.

Payroll Status Tab

The following fields appear on the **Payroll Status** tab.

Field Label	Field Description
Sage100 ERP Employee Number	Leave this field blank. The field will automatically populate when the transfer is complete. If you are transferring employees from Sage HRMS to Sage 100 ERP Payroll for the first time, we recommend you leave this field blank. For more information about employee numbers, see the section Validating Employee Numbers later in this section.
Benefit Code	Select the benefit schedule code.
SUI State	Select the state code associated with the employee's state unemployment insurance.
Autopay Employee	Indicate whether you want the system to use the automatic payment amount for this employee.
Direct Deposit	Indicate whether the employee uses direct deposit.
Overtime Exempt	Indicates whether the employee is exempt from overtime pay. This is a read-only field.
Pension / Profit Sharing	Indicate whether the employee is eligible for an employer-sponsored retirement plan.
Pay Cycle	Automatically populated with the Pay Frequency from the Current Pay page. This is a read-only field.
Pay Method	Automatically populated with values from the Salaried/Hourly field on the Current Job Detail page. This is a read-only field.
Hourly Pay Rate / Pay Period Salary	Automatically populated with values from either the Unit Pay Rate or the Pay Period Salary from the Current Pay Detail page. This is a read-only field. \n If the employee is salaried, the amount displayed in the Pay Period Salary field reflects a pay period salary. If the employee is hourly, the amount displayed in the Hourly Pay Rate field reflects an hourly rate.

Federal Tax Tab

The following fields appear on the **Federal Tax** tab.

Field Label	Field Description
Filing Status	Select the federal filing status.
Dependent Exemptions	Enter the number of dependent exemptions for federal filing.
Override Withholding Tax Calculation	<p>Override Withholding Tax Calculation enables you to override the normal tax calculation. Select a value from the drop-down list:</p> <p>None Specified – The employee requires the normal tax table withholding calculation.</p> <p>Use Percentage – The withholding tax is to be calculated as a percentage of the gross wages (the percentage amount set at the Override Amount field).</p> <p>Add Amount – The withholding tax derived from the tax table is to be adjusted by adding the amount at the Override Amount field.</p> <p>Use Fixed Amount – The withholding tax is to be a fixed amount equal to the amount entered at the Override Amount field.</p>
Override Withholding Tax Amount	<p>The Override Withholding Tax Amount field is available only if an option other than None is selected at the Override Withholding Tax Calculation field. If Use Percentage is selected, enter the percentage rate to be applied. If Add Amount is selected, enter the amount to be added to the calculated withholding tax amount. If Use Fixed Amount is selected at the Override Withholding Tax Calculation field, enter the withholding tax amount for each paycheck.</p> <p>You cannot enter a negative amount.</p>

State Tax Tab

The following fields appear on the **State Tax** tab.

Field Label	Field Description
Primary State	Select the primary state.
Primary State Filing Status	Select the primary state filing status. If the Filing Status field is blank, download the latest Sage 100 ERP Tax Update from Sage Online Support and Services.
Primary State Dependent Exemptions	Enter the number of dependent exemptions for the primary state filing.
Primary State Personal Exemptions	Enter the number of personal exemptions for the primary state filing.
Primary State	Override Withholding Tax Calculation enables you to override the normal tax calculation.

Field Label	Field Description
Override Withholding Tax Calculation	Select a value from the drop-down list: None Specified – The employee requires the normal tax table withholding calculation. Use Percentage – The withholding tax is to be calculated as a percentage of the gross wages (the percentage amount set at the Override Amount field). Add Amount – The withholding tax derived from the tax table is to be adjusted by adding the amount at the Override Amount field. Use Fixed Amount – The withholding tax is to be a fixed amount equal to the amount entered at the Override Amount field.
Primary State Override Withholding Tax Amount	The Override Withholding Tax Amount field is available only if an option other than None is selected at the Override Withholding Tax Calculation field. If Use Percentage is selected, enter the percentage rate to be applied. If Add Amount is selected, enter the amount to be added to the calculated withholding tax amount. If Use Fixed Amount is selected at the Override Withholding Tax Calculation field, enter the withholding tax amount for each paycheck. You cannot enter a negative amount.
Primary State Workers' Compensation Code	Select the employees' workers' compensation code.
Secondary State	Select the secondary state filing status.
Secondary State Filing Status	Select the state filing status (primary state). If the Filing Status field is blank, download the latest Sage 100 ERP Tax Update from Sage Online Support and Services.
Secondary State Dependent Exemptions	Enter the number of dependent exemptions for the secondary state filing.
Secondary State Personal Exemptions	Enter the number of personal exemptions for the secondary state filing.
Secondary State Override Withholding Tax Calculation	Override Withholding Tax Calculation enables you to override the normal tax calculation. Select a value from the drop-down list: None Specified – The employee requires the normal tax table withholding calculation. Use Percentage – The withholding tax is to be calculated as a percentage of the gross wages (the percentage amount set at the Override Amount field). Add Amount – The withholding tax derived from the tax table is to be adjusted by adding the amount at the Override Amount field. Use Fixed Amount – The withholding tax is to be a fixed amount equal to the amount entered at the Override Amount field.
Secondary State Override Withholding	The Override Withholding Tax Amount field is available only if an option other than None is selected at the Override Withholding Tax Calculation field. If Use Percentage is selected,

Field Label	Field Description
Tax Amount	enter the percentage rate to be applied. If Add Amount is selected, enter the amount to be added to the calculated withholding tax amount. If Use Fixed Amount is selected at the Override Withholding Tax Calculation field, enter the withholding tax amount for each paycheck. You cannot enter a negative amount.
Secondary State Workers' Compensation Code	Select the employees' workers' compensation code.

Local Tax Tab

The following fields appear on the **Local Tax** tab. The **Local Tax** tab is available only if a local tax is set up for the primary state selected.

Field Label	Field Description
Primary State Local Code	Select the primary state local code.
Filing Status	Select the primary state local filing status.
Dependent Exemptions	Enter the number of dependent exemptions for the primary state local filing.
Personal Exemptions	Enter the number of personal exemptions for the primary state local filing.
Override Withholding Tax Calculation	Override Withholding Tax Calculation enables you to override the normal tax calculation. Select a value from the drop-down list: None Specified – The employee requires the normal tax table withholding calculation. Use Percentage – The withholding tax is to be calculated as a percentage of the gross wages (the percentage amount set at the Override Amount field). Add Amount – The withholding tax derived from the tax table is to be adjusted by adding the amount at the Override Amount field. Use Fixed Amount – The withholding tax is to be a fixed amount equal to the amount entered at the Override Amount field.
Override Withholding Tax Amount	The Override Withholding Tax Amount field is available only if an option other than None is selected at the Override Withholding Tax Calculation field. If Use Percentage is selected, enter the percentage rate to be applied. If Add Amount is selected, enter the amount to be added to the calculated withholding tax amount. If Use Fixed Amount is selected at the Override Withholding Tax Calculation field, enter the withholding tax amount for each paycheck. You cannot enter a negative amount.

Validate Employee Numbers

In Sage 100 ERP Payroll, the employee number consists of the 2-digit department code followed by 7 digits. For example, the Sage100 ERP employee number might be 11-0000100.

In Sage HRMS, the employee ID consists of up to nine digits.

Note: The Sage 100 ERP employee number must contain only alpha and/or numeric characters (for example, alphabetic characters a-z, A-Z and numeric characters 0-9). If you enter employee numbers in Sage HRMS you must not use any special characters (i.e. #, -, @ or punctuation marks).

In summary, here's what happens when data is transferred between Sage HRMS and Sage 100 ERP Payroll:

- If an employee with a corresponding employee number and Social Security Number (SSN) does not exist in the receiving system, a new employee record is created.
- If an employee with a corresponding employee number and SSN *does* exist in the receiving system, the existing employee record is updated with the new information.

To understand exactly how the link validates employee numbers during the data transfer processes, see below.

Sage 100 ERP Payroll to Sage HRMS

When you transfer data from Sage 100 ERP Payroll to Sage HRMS, the link uses the following steps to validate employee numbers.

Step 1

The 2-digit department code is dropped and the remaining 7-digit employee number is validated in Sage HRMS.

- If the number does not already exist in Sage HRMS, a new employee record is created using the 7-digit number as the Employee ID (P_EMPNO). The 9-digit Sage 100 ERP Payroll employee number, including the 2-digit department code, is stored on the Sage 100 ERP Payroll Setup page in Sage HRMS (in the Sage 100 ERP Emp Number field).
- If the seven-digit number does exist in Sage HRMS, then the SSNs are checked. If the SSNs match, then the existing employee record is overwritten with the new data being transferred.

If the SSNs are different, the link proceeds to Step 2.

Step 2

The 9-digit Sage100 ERP Payroll employee number, including the 2-digit department code, is validated in Sage HRMS.

- If the number does not already exist in Sage HRMS, a new employee record is created using the 9-digit number as the Employee ID (P_EMPNO). The 9-digit number is also stored on the Sage 100 ERP Payroll Setup page in Sage HRMS (in the Sage 100 ERP **Employee Number** field).
- If the 9-digit number does exist in Sage HRMS, then the SSNs are checked. If the SSNs match, then the existing employee record is overwritten with the new data being transferred.
- If the SSNs are different, you will receive an error on the audit report and the employee will not be transferred.

Sage HRMS to Sage 100 ERP Payroll

When you transfer data from Sage HRMS to Sage 100 ERP Payroll, the link checks the **Sage 100 ERP Employee Number** field on the Sage 100 ERP Payroll Setup page in Sage HRMS.

- If the field is not blank, the number it contains is validated in Sage 100 ERP Payroll.
- If the field is blank, the link creates a Sage 100 ERP Payroll employee number as follows. If the Sage HRMS employee ID is fewer than 7 digits, zeros are added between the Sage 100 ERP Payroll department code and the ID number. If the Sage HRMS employee ID is nine digits, the last two are deleted. The resulting number is validated in Sage 100 ERP Payroll.

For example, Donald Adams's organization level has been mapped to Department 11 in Sage 100 ERP Payroll, using the Setup and Configuration page. His employee ID in Sage HRMS is 101. The resulting Sage 100 ERP employee number is 110000101.

Another employee's organization level has been mapped to Department 12 in Sage 100 ERP Payroll. His employee ID in Sage HRMS is 123456789. The resulting Sage 100 ERP employee number is 121234567.

The employee number is then validated as follows.

- If the number does not exist in Sage 100 ERP Payroll, a new employee record is created.
- If the number exists in Sage 100 ERP Payroll, then the SSNs are checked. If the SSNs match, then the existing employee record is overwritten with the new data being transferred.
- If the SSNs are different, you will receive an error on the audit report and the employee will not be transferred.

Note: If you change an employee's department code in Sage 100 ERP Payroll, you must ensure that the employee number is changed as necessary on the Sage 100 ERP Payroll Setup page and the employee's organization level is changed using the Change Employee's Organization action.

Sage HRMS to Sage 100 ERP Payroll Data Transfer

You can use the Sage HRMS to Sage 100 ERP Payroll Data transfer process to initially populate your Sage 100 ERP system with employees. You can also update existing employee data in Sage 100 ERP with changes that have been made in Sage HRMS.

Here are the steps you need to follow when transferring data from Sage HRMS to Sage 100 ERP Payroll:

1. Map all appropriate values using the Employer and Code Mapping page, as described in Set Up the Link. This step only needs to be completed one time, prior to the first data transfer.
2. Enter all necessary payroll information on the Sage 100 ERP Payroll Setup page for the employees you want to transfer. For more information, see Use the Sage 100 ERP Payroll Setup page.
3. Use the Sage HRMS to Sage 100 ERP Payroll transfer process to transfer employee data, as described in this section.

Data to Be Transferred

When you transfer data from Sage HRMS to Sage 100 ERP Payroll, the contents of fields that are mapped together are transferred from one system to the other. For more information about mapped fields, see Set Up the Sage 100 Standard ERP Link. Sage 100 ERP Payroll needs information for payroll that is not maintained in Sage HRMS. Prior to transferring employees to Sage 100 ERP, you must enter the needed payroll information in the Sage 100 ERP Payroll Setup page.

The information is then transferred to Sage 100 ERP to set up employees' payroll. For more information about the Sage 100 ERP Payroll Setup page, see Use the Sage 100 ERP Payroll Setup page.

Note: When you transfer employees from Sage HRMS whose status is LOA, Sage 100 ERP sets their status to **Inactive** and no payroll is run for them.

To Transfer Data from Sage HRMS to Sage 100 ERP Payroll

1. From the Sage 100 Standard ERP Link Main Menu, select **Transfer > Sage HRMS to Sage 100 ERP Payroll**. The Transfer Sage HRMS to Sage 100 ERP Payroll page opens. The date of the last transfer is displayed at the bottom of the page.
2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked employers for which you want to transfer employees.
3. Indicate whether you want to transfer all employees, specific employees, or a specific department.
 - Choose **All Employees** to transfer all employees.

- Choose **Select Employees** to select specific employees. Click the arrow adjacent to Select Employees. The Select Employees dialog box opens. The Available list shows all employees in Sage HRMS. Double-click the employees you want to include in the transfer. The selected employees appear in the right list box. If you want to remove an employee from the Selected list, highlight it, and click Remove.
 - Choose **Select Departments** to select a specific department. Click the arrow adjacent to Select Departments. The Select Departments dialog box opens where you can double-click the departments you want to include in the transfer. The selected department appears in the right list box. If you want to remove a department from the Select list, highlight it and click Remove.
4. After indicating the information you want to transfer, click **OK**.
 5. If you want the transfer to include only those employees who were added or changed within a specified date range, enter **From** and **Through** dates.
 6. If you want the transfer to include terminated employees, place a check in the **Include Terminated Employees** check box and enter the specific termination date in the **From** field to find employees that were terminated on the specified date.

Note: Only employees that have a termination date within the current year can be transferred.

7. Indicate whether you want to run the Audit Report before you transfer employees, run the Audit Report only or Transfer Employees only. The audit report shows separate report sections for New Employees, Modified Employees, and Invalid Employees when applicable. Review the audit report and make the necessary changes before proceeding.

Note: We *strongly recommend* you review the Audit report to ensure the accuracy of your information before proceeding with the employee transfer.

8. Click **OK**. The system asks you to confirm the transfer. Click **Yes** to confirm the transfer, or click **No** to cancel the transfer.
9. A message informs you when the transfer is complete. Click **OK**.
10. The first time an employee is transferred from Sage HRMS to Sage 100 ERP Payroll, you must apply the appropriate **Schedule Code** in order for the employee's benefit schedule limits to begin accruing properly. In Sage 100 ERP, the **Schedule Code** field is found on the **Payroll > Setup > Benefit Schedule Maintenance** screen.

Sage 100 ERP Payroll to Time Off

You can use Sage 100 ERP Payroll to Time Off transfer process to transfer absence transactions from Sage 100 ERP Payroll to Time Off.

Here are the steps you need to follow when transferring data from Sage 100 ERP Payroll to Time Off:

1. Map all appropriate values using the Employer and Code Mapping page, as described in Set Up the Link. This step only needs to be completed one time, prior to the first data transfer.
2. Run a payroll in Sage 100 ERP.
3. Use the Sage 100 ERP Payroll to Time Off transfer process to transfer employee data, as described in this section.

Data to Be Transferred

For more information about mapping, see Set Up the Sage 100 Standard ERP Link.

During the Update Check Register process in Sage 100 ERP, the system creates a temporary file to store absence-related information for employees. Information is only stored for earnings that are mapped to an absence reason code in Time Off and that have an earnings type you selected as an Earnings Types for Time Off Absence Transactions when mapping employers.

When you use the Sage 100 ERP Payroll to Time Off transfer process, the information stored in this file is used to create absence transactions in Time Off.

Tip: To locate absence transactions in Time Off, from the Navigation Pane, select **Employees > View/Edit Employee (select an employee) > Time Off > Absence Transactions**.

The following table lists the Time Off fields that are populated for each attendance transaction, as well as the Sage 100 ERP source for each field.

Time Off Field	Source in Sage 100 ERP
Benefit Date	Benefit Date in Payroll Data Entry.
Day	Determined from the Benefit Date.
Reason	Absence reasons in Time Off corresponding to the earnings code in Sage 100 ERP Payroll. Absence reasons are mapped to earnings codes on the Employer and Code Mapping page as described in Set Up the Sage 100 Standard ERP Link.
Hours	Hours in Payroll Data Entry.
Comment	Description of the earnings code used to create the absence transaction.

To Transfer Data from Sage 100 ERP Payroll to Time Off

1. From the Sage 100 Standard ERP Link Main Menu, select **Transfer > Sage 100 ERP Payroll to Time Off**. The Transfer Sage 100 ERP Payroll to Time Off page opens. The date of the last transfer is displayed at the bottom of the page.

2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked employers for which you want to transfer employees.
3. Indicate whether you want to run the Audit Report before you transfer employees, run the Audit Report only or transfer employees only. The audit report shows you a list of employees who will be transferred to Sage HRMS. Review the audit report and make the necessary changes before proceeding.

Note: We *strongly recommend* you review the Audit report to ensure the accuracy of your information before proceeding with the employee transfer.

4. Click **OK** . The system asks you to confirm the transfer. Click **Yes** to confirm the transfer, or click **No** to cancel the transfer.
5. A message informs you when the transfer is complete. Click **OK**.

Sage 100 ERP Payroll to Sage HRMS Transfer

Use the Sage 100 ERP Payroll to Sage HRMS Transfer process **only once** to initially populate your Sage HRMS system with employees. Thereafter, maintain all employee information in Sage HRMS and transfer changes to Sage 100 ERP Payroll as needed, using the Sage HRMS to Sage 100 ERP Payroll transfer process. Transferring employees from Sage 100 ERP Payroll to Sage HRMS more than once may create undesirable results and is not supported.

New employees should be entered into Sage HRMS using the Add New Employee task and then transferred from Sage HRMS to Sage 100 ERP Payroll.

During the first employee transfer from Sage 100 ERP Payroll to Sage HRMS, the reason code "Sage 100 ERP" will be transferred as the Reason code. When you open the Current Job page for a transferred employee, this code will appear in the Change Reason field as "**Sage 100 ERP-Not in code table.**" At this point, you can do one of the following:

- Leave the code as is.
- Go to the Reasons code table (from the Sage HRMS Navigation Pane, select **Setup > Employees > Code Tables > Reason Codes**) and add an appropriate description for the "Sage 100 ERP" code.
- Select **Add New Code** from the **Change Reason** drop-down list on the Current Job page and add an appropriate description for the "Sage 100 ERP" code.

Follow these steps to transfer data from Sage 100 ERP Payroll to Sage HRMS:

1. Map all appropriate values using the Employer and Code Mapping page, as described in Set Up the Sage 100 Standard ERP Link. This step only needs to be completed one time, prior to the first data transfer.
2. Use the Sage 100 ERP Payroll to Sage HRMS transfer process to transfer employee data, as described in this section.

Data to Be Transferred

When you transfer data from Sage 100 ERP Payroll to Sage HRMS, the contents of fields that are mapped together are transferred from one system to the other. For more information about mapped fields, see Set Up the Sage 100 Standard ERP Link.

To Transfer Data from Sage 100 ERP Payroll to Sage HRMS

1. From the Sage 100 Standard ERP Link Main Menu, select **Setup > Sage 100 ERP Payroll to Sage HRMS Transfer**. The Transfer Sage 100 ERP Payroll to Sage HRMS page opens. The date of the last transfer is displayed at the bottom of the page.
2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked companies for which you want to transfer employees.
3. Indicate whether you want to transfer all employees or specific employees. Click the arrow adjacent to Select Employees. The Select Employees dialog box opens. The Available list shows all employees in Sage 100 ERP Payroll.
4. From the Available list box, double-click the employees you want to include in the transfer. The selected employees appear in the right list box. If you want to remove an employee from the list, highlight the employee name and click Remove.
5. Click **OK**.
6. If you want the transfer to include terminated employees, place a check in the Include Terminated Employees check box. Otherwise, leave the check box blank.
7. Indicate whether you want to run the Audit Report before you transfer employees, run the Audit Report only or transfer employees only. The audit report shows you separate report sections for New Employees, Modified Employees and Invalid Employees when applicable. Review the audit report and make the necessary changes before proceeding.

Note: We strongly recommend you review the Audit report to ensure the accuracy of your information before proceeding with the employee transfer

8. Click **OK**. The system asks you to confirm the transfer. Click **Yes** to confirm the transfer, or click **No** to cancel the transfer.
9. A message informs you when the transfer is complete. Click **OK**.
10. From the Sage HRMS navigation pane, select **Employees > Processes > Import Calculations**. The system automatically updates any remaining fields that were not imported during the Sage 100 ERP Payroll to Sage HRMS transfer.
11. Click **OK** when the Import Calculations process is complete.
12. If Sage HRMS is set up to automatically add benefits to all active employees, you must run the Update Benefits process.
13. Click **OK** when the Update Benefits process is complete.

Audit Reports

After you have set up and begun using the Sage 100 Standard ERP Link, you can run the audit reports periodically to compare your Sage HRMS and Sage 100 ERP Payroll systems. The reports will show discrepancies between the two systems, such as missing employees, different addresses, etc. You can then determine whether you need to run a data transfer from one system to the other.

The Sage 100 Standard ERP Link provides the following audit reports:

- Sage HRMS to Sage 100 ERP Payroll Audit Report
- Sage 100 ERP Payroll to Time Off Audit Report
- Sage 100 ERP Payroll to Sage HRMS Audit Report

The Sage HRMS to Sage 100 ERP Payroll Audit Report and the Sage 100 ERP Payroll to Sage HRMS Audit Report generate separate report sections for New Employees, Modified Employees and Invalid Employees. If data is not found for any one of the report sections, the system will not generate the report section. For example, if New Employees and Invalid Employees are found but no Modified Employees are found, the system will not generate a Modified Employees section.

To Run the Sage HRMS to Sage 100 ERP Payroll Audit Report

1. From the Sage 100 Standard ERP Link Main Menu, select **Reports > Audit Reports > Sage HRMS to Sage 100 ERP Payroll Audit Report**. The Sage HRMS to Sage 100 ERP Payroll Audit Report page opens.
2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked companies for which you want to run the report.
3. Indicate whether you want to run the report for all employees or specific employees. Click the arrow adjacent to **Select Employees**. The Select Employees dialog box opens. The Available list shows all Sage HRMS employees.
4. From the **Available** list box, double-click the employees you want to include in the report. The selected employees appear in the right list box. If you want to remove an employee from the list, highlight the employee name and click **Remove**.
5. Click **OK**.
6. If you want the report to include only those employees who were added or changed within a specified date range, enter **From** and **Through** dates.
7. If you want the report to include terminated employees, select the **Include Terminated Employees** check box. Otherwise, leave the check box blank.
8. Click **Print** to print the report, **Preview** to preview the report.

To Run the Sage 100 ERP Payroll to Time Off Audit Report

1. From the Sage 100 Standard ERP Link Main Menu, select **Reports > Audit Reports > Sage 100 ERP Payroll to Time Off Audit Report**. The Sage 100 ERP Payroll to Time Off Audit Report page opens.
2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked companies for which you want to run the report.
3. Click **Print** to print the report, **Preview** to preview the report.

To Run the Sage 100 ERP Payroll to Sage HRMS Audit Report

1. From the Sage 100 Standard ERP Link Main Menu, select **Reports > Audit Reports > Sage 100 ERP Payroll to Sage HRMS Audit Report**. The Sage 100 ERP Payroll to Sage HRMS Audit Report page opens.
2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked companies for which you want to run the report.
3. Indicate whether you want to run the report for all employees or specific employees. Click the arrow adjacent to **Select Employees**. The Select Employees dialog box opens. The **Available** list shows all Sage HRMS employees.
4. From the **Available** list box, double-click the employees you want to include in the report. The selected employees appear in the right list box.
5. Click **OK**.
6. If you want the report to include terminated employees, select the **Include Terminated Employees** check box. Otherwise, leave the check box blank.
7. Click **Print** to print the report, **Preview** to preview the report.

Setup Reports

Review all the mapped and unmapped codes by printing your setup reports. Use these reports as a reference before or after updating your code mappings for each linked company.

The Sage 100 Standard ERP Link provides the following setup reports:

- Benefit Plan / Deduction Code
- Organization Code / Department Code
- Job Code / Labor Code
- Absence Reason / Earning Code

To Run a Setup Report

1. From the Sage 100 Standard ERP Link Main Menu, select **Reports > Setup Reports** and the setup report you want to run. The appropriate setup report page opens.

2. From the **Sage HRMS > Sage 100 ERP Payroll Employer Selection** drop-down list, select the linked employers for which you want to run the report.
3. If you want the report to include unmapped codes, select the **Include Unmapped Codes** check box. Otherwise, leave the check box blank.
4. Click **Print** to print the report, **Preview** to preview the report.

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Absence Reasons / Earnings Code Setup report, 34

Audit reports, 33

automatic mapping of data, 10

B

before you transfer data to Attendance, 9

Benefit Plan / Deduction Code Setup report, 34

C

check register update, 10

D

define Sage 100 ERP Standard System location, 5

E

Edit Mapped Fields page, 9, 16

editing and deleting data mappings, 9, 16

H

how benefit information is transferred, 12

I

Import Calculations process, 19, 32

install the Link, 5

interfacing with Time Off, 9

J

Job Code / Labor Code Setup report, 34

M

manual mapping of data, 10

map employers, 7

mapping job codes to labor codes, 15

mapping organization codes to department codes, 14

O

Organization Code / Department Code Setup report,
34

overview of data mapping, 10

P

payroll data entry, 9

Payroll Data Entry Audit report, 10

R

Refresh Sage HRMS Code Tables process, 17, 21

S

Sage 100 ERP Standard Payroll Setup page, 21

Sage 100 ERP Standard Payroll to Sage HRMS Audit
report, 34

Sage 100 ERP Standard Payroll to Time Off Audit
report, 34

Sage 100 ERP Standard Payroll to Time Off data transfer, 29

Sage 100 ERP Standard to Time Off Data Transfer page, 29

Sage HRMS to Sage 100 ERP Standard Payroll Audit report, 33

Sage HRMS to Sage 100 ERP Standard Payroll data transfer, 28

Setup Report, 34

start the Link, 5

T

transferring data from Sage HRMS, 28

transferring data to Sage HRMS, 17, 31

transferring data to Time Off, 29

U

using the Sage 100 ERP Standard Payroll Setup page, 21

V

validating employee numbers, 26