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Overview

This document includes instructions for installing Sage HRMS 2014 for the first time and for upgrades.

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

- Sage HRMS 2014 installation package.
- Sage HRMS 2014 Release Notes (if you are upgrading, to learn about the new features, enhancements, and modifications in Sage HRMS 2014).

**Important!** We recommend that you have your Sage HRMS installed by a certified Channel Partner or a member of the Sage Professional Services Group.

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:

1. **Read** the Help menu or click 📚 at the top of the window in Sage HRMS to open Help for the function you are currently using.

2. **Log on** to the Sage Customer Portal at: [https://customers.sagenorthamerica.com](https://customers.sagenorthamerica.com)
   - Search for solutions to common problems
   - Download product updates
   - Read technical information
   - Open a support case
   - Create a service request
   - Grant your channel partner permission to view your support tickets

3. **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: [https://support.na.sage.com/selfservice/](https://support.na.sage.com/selfservice/)

4. **Call** Sage HRMS Support, Monday through Friday from 8:00 a.m. to 8:00 p.m. Eastern Time at 800-829-0170. Please have your Customer ID ready when contacting Support.

Hardware/Software Requirements and Recommendations

Installing Sage HRMS

This section steps you through installing Sage HRMS for the first time. To familiarize yourself with the installation process, be sure to read all the steps before you start the installation.

If you are upgrading from a previous version of Sage HRMS, skip to the appropriate upgrade section of this guide.

Before You Begin

For Payroll installs: If you are installing Sage HRMS Payroll, be advised that Sage 300 ERP (formerly Sage Accpac ERP) and Sage HRMS Payroll cannot reside on the same server. Before you start the installation, make sure that Sage 300 ERP is not on the server on which you are installing Sage HRMS Payroll.

Note: When Sage HRMS 2014 is installed without Sage HRMS Payroll, the product supports integration with Sage 300 ERP.

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

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

• Immediately after the install have the Enterprise SQL DB Administrator downgrade this account to DB Owner credentials only. Be advised that the account used during installation is the same account and password that will be used by the Sage HRMS application. To test this account and password combination, refer to the Database Connection Tool instructions on page 19.

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

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

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

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

**Step 1: Install Sage HRMS on the Server**

1. At the server machine, open the Sage HRMS installation package.
   - If you are using Sage HRMS with Microsoft® SQL Server® 2005, SQL Server® 2008 (or Express Edition), SQL Server® 2012 (Standard, Express, or Enterprise Editions), and the SQL Server is installed, proceed to number 5 below.
   - If you are using Sage HRMS with Microsoft SQL Server Express Edition and need to install SQL Server Express Edition, proceed to number 2 to install SQL Server Express 2008 R2 Edition.

2. Navigate to the SQLExpress folder in the installation package, right-click on the WindowsInstallerXXX.exe file, and select to Run as administrator.

3. Select Install SQL Server Express Edition and proceed with the installation. The system checks for, and if necessary, installs prerequisites for installation (such as Windows Installer 4.5, .NET Framework 3.5, and MDAC 2.8) before it begins installing SQL Server Express 2008 R2 edition.

4. When the SQL Server Express 2008 R2 Edition installation is complete, restart your system.

5. Select the Sage HRMS folder within the installation package, right-click on the setup.exe file, and choose Run as administrator. If a grey box is displayed on the message, uncheck the box and click OK. The Sage HRMS Installer opens.

6. When the Welcome dialog box appears, click Next.

7. Review the Sage End User License Agreement in the License Agreement dialog box then select I accept the terms of the license agreement. Click Next.

8. In the Customer Information dialog box, enter your User Name and Organization. Click Next.

9. The Destination Folder dialog box shows the default destination folder where Sage HRMS Server will be installed: C:\ProgramData\Sage\SageHRMSServer (on Windows Server 2008 and 2012) or C:\Documents and Settings\All Users\Application data\Sage\SageHRMSServer (on
Windows Server 2003). Click Next to accept the default destination; otherwise click Change and select another destination.

10. Enter the required information in the SQL Setup dialog box. As you enter information, note the following:

**Server, User, Password**

- If you are using SQL Server Express, enter `<computer name>`\sagehrmsx (for example, flh5109901\sagehrmsx) for the **Server Name**, then enter sa in the **User Name** field and Sagehrms! in the **Password** field.

- If you are using SQL Server, enter the **Server Name**, **User Name**, and **Password** in the corresponding fields. The SQL Server logon must be included in the administrator group.

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

**Databases**

- Periods are not permitted in database names.

- The databases displayed are the default SQL databases that are installed. SageHRMS_Live and SageHRMS_System are both required.

- Optionally, the **Sample** databases can be installed. Sample data allows you to exercise the system using data from a simulated company that does not affect your live company data.

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

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

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

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

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

11. Click Next to establish a connection with the server.

- If you receive a message that the server name, user name, or password is invalid, verify that your entries are correct. If you are installing for SQL Server Express and you did not restart your system before installing Sage HRMS, restart your computer, and start the install again.

12. The Ready to Install the Program dialog box opens.
13. You can review your settings by clicking <Back through the previous screens. After you verify your settings are correct, click Install. The progress bar appears during the installation.

14. When the server installation is complete, the Install Completed dialog box opens.

15. Click Finish. Restart your system if you are prompted to do so.

16. After restart, from Windows Explorer, go to the destination folder where you installed the server, By default, it is C:\ProgramData\Sage\SageHRMSServer (on Windows Server 2008 and 2012) or C:\Documents and Settings\All Users\Application data\Sage\SageHRMSServer (on Windows Server 2003)

17. Set your sharing settings as follows:
   a. Right-click the SageHRMSServer folder and select Properties.
   b. Click the Sharing tab and Share the folder. You may be required to click the Advanced Sharing button to proceed depending on your system. Set the Permissions for users who access Sage HRMS over the network on the shared folder to Allow Full Control.
   c. Make sure the folder’s Share Name does not contain a space. For example, use “SageHRMSServer” as a share name instead of Sage HRMS Server.

18. Click Apply and then OK to close.

Step 2: Enable Server Protocols and the SQL Browser Service

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

To enable server protocols:

1. Open the SQL Server Configuration Manager. Depending on your Microsoft SQL Server version (2005, 2008, or 2012), this may be from the Start Menu > All Programs > Microsoft SQL Server > Configuration Tools > SQL Server Configuration Manager.

2. In the SQL Server Configuration Manager, on the left panel, expand SQL Server Network Configuration.

3. Click Protocols for YOURSERVERNAME. If you installed SQL Server Express for Sage HRMS, the server name defaults to SAGEHRMS, but another name may display if SQL Server is already installed on the machine.

4. Set the TCP/IP protocol to Enabled. For the purpose of client installs, the status of the other protocols does not matter.

5. Exit the SQL Server Configuration Manager.

To enable the SQL Browser Service:
1. From the Start Menu, select All Programs > Microsoft SQL Server > Configuration Tools > SQL Server Surface Area Configuration.

   If you are using SQL Server Express 2008 R2, you can skip ahead to number 11 below.

2. In the Configure Surface Area for localhost section (at the bottom of the window), select Surface Area Configuration for Services and Connections.

3. From the SQL Server Surface Area Configuration window, highlight Service in the left-hand panel.

4. Verify the Service name (MSSQL$SAGEHRMSX, for example) is set to Automatic (in the Startup type field) and that it is Running (in the Service status field). If it is not running, you must Start the service.

5. Highlight Remote Connections in the left-hand panel.

6. Verify that only Local and remote connections and Using TCP/IP only are selected.

7. Highlight SQL Server Browser in the left-hand panel. The Startup type will be set to Disabled and the Service status will be set to Stopped.

8. Change the Startup type to Automatic and click Apply.

9. Click Start to start the SQLBrowser service. The Startup type is Automatic and the Service status is Running.

10. Click OK and then close the SQL Server Surface Area Configuration window.

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

12. Select Services from the Services and Applications section and scroll down to the SQL Server entries.

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


**Step 3: Install the Sage HRMS Client**

For each client machine that should access Sage HRMS, do the following. Note that if you are operating Sage HRMS on the server machine, you must also install a client on that server machine. Additionally, client installs only need to be done for the first install of Sage HRMS client.
To install the Sage HRMS client:

1. At the client machine, go to the shared folder on the server (either by using a UNC path or by creating a mapped drive) and, from the Client folder, right-click the setup.exe file, and select to Run as administrator. The Windows Installer will begin.

If you are installing a client on the server machine, you can start the client installation using the shortcut Sage HRMS Client Install that is placed on the desktop during the server installation.

2. The client installation begins and searches your machine for the required components. If a required component is not found, a dialog box lists the components required to be installed.

   **Important!** Administrator privileges are required to install these components. If you are installing on Windows XP, Windows 2003 Server and you are not a member of the administrators group, you will likely encounter errors. If you are installing on a later operating system such as Windows 7, Windows 2008 Server, or Windows 2012, and you are not a member of the administrators group, you will be required to enter an administrator user account and password before you can continue.

3. Click **Install** to start installing the required components. When component installation is complete, you could be asked to restart your computer. If this is the case, restart immediately (not later).

4. When computer restart is complete, the Sage HRMS Client Install Welcome window appears. Click **Next** to continue with the client installation.

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

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

7. The Register dialog box appears. Note that registration is required only on the first client installation. Enter the **Serial Number** and **Installation Code** you obtained from Sage Customer Service or when you purchased the product. If you want to add the Sage 100 Standard ERP Link, Sage 100 Advanced ERP Link, Sage 500 ERP G/L Link, or Sage ERP X3 G/L Interface, select the associated check boxes. Click **OK**.

8. After registration is complete, click **OK** when prompted to update your files. The Sage HRMS Logon window appears when file update is complete. Follow the prompts if you are asked to restart Sage HRMS.
Step 1: Upgrade the Server

You must have administrator privileges to install this upgrade.

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

1. Back up your data.
2. At the server machine, open the Sage HRMS installation package. Browse with Windows Explorer to the Sage HRMS folder, right-click the setup.exe file and choose to Run as administrator. The Sage HRMS Installer opens.
3. Click Install Sage HRMS. The Preparing to Install window opens and the server upgrade process begins.
4. When the Welcome dialog box appears, click Next.
5. The installation starts and the progress bar displays during the installation.
6. After the server installation is complete, the Install Completed dialog box opens.
7. Click Finish. Restart your system if you are prompted.

Step 2: Upgrade the Client

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

1. At the client machine, select Start > All Programs > Sage > Sage HRMS Client > Sage HRMS Client.
2. A message appears stating that this will perform an upgrade to the Sage HRMS Client. To continue, click Yes.
3. When the client upgrade is complete, you will be prompted to restart Sage HRMS before proceeding.
If You Are Not Installing Sage HRMS Payroll

4. The Update dialog box opens after clicking Finish. Click OK to update your files.

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

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

7. Click OK when prompted to update your files.

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

If You Are Installing Sage HRMS Payroll

4. The Payroll modules dialog box opens after you click Finish. Click Yes to install the Payroll modules (you must have administrator privileges).

5. When the Payroll modules installation is complete, the Update dialog box opens. Click OK to update your files.

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

After Upgrading

Perform the following steps after upgrading Sage HRMS. If you have custom applications, you must designate their location. Do the following procedure to use the Abrawin.ini file to locate the custom applications in any specified location.

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

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

3. Open the Abrawin.ini file (now located in the \SageHRMS\Server folder) and add a [Sage HRMS] section that designates the path to the custom applications folder. For example, the following two lines added to the Abrawin.ini file will direct Sage HRMS to search the Third Party Apps folder for the custom applications installed in the folder. (Sage HRMS will search only in the root path, not in sub-folders.)

[Sage HRMS]

CustomApps = C:\Sage HRMS\Third Party Apps\
Converting from Sage Abra Suite v9.x

This section discusses the procedures for converting your HR-only Visual FoxPro database in Sage Abra Suite to SQL Server database in Sage HRMS.

These procedures basically consist of installing Sage HRMS 2014, converting your existing Sage Abra Suite Visual FoxPro data to Sage HRMS SQL Server data, and changing the data source for custom reports from Abra Data Access to Sage HRMS Data Access.

**Important!** Due to the complexity of converting your Sage Abra Suite data to Sage HRMS, it is critical that you contact Sage HRMS Customer Support or your certified Channel Partner for assistance with this process.

You must have administrator rights to install this upgrade.

**To convert from Sage Abra Suite v9.x:**

1. Install Sage HRMS. See the Installing Sage HRMS section of this guide.
   - You must install the server as well as all remote clients.
   - You can install Sage HRMS on the same server machine as your Sage Abra Suite (this is called a side-by-side).

2. When server and client installations are complete, you must now upsize your data. This converts your HR-only database from Visual FoxPro to SQL Server or SQL Server 2005 Express Edition. See Using the Upsize Wizards for FoxPro to SQL Server Conversion (next section).

3. If you are using Sage HRMS Link or custom Visual FoxPro databases (such as for third-party applications), you must now upsize your Sage HRMS Link and custom data. See Upsizing Sage HRMS Link and Custom Databases.

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

**Using the Upsize Wizards for FoxPro to SQL Server Conversion**

The Sage HRMS Data Upsizing Wizard converts an HR and Time Off-only Sage Abra Suite (Visual FoxPro) database to a SQL Server or SQL Server Express Edition database. If your system includes Sage Abra Suite Payroll, the Upsize Wizard updates the payroll data for archival purposes and the data cannot be used “as is” in Sage HRMS Payroll. Contact Sage HRMS Customer Support for assistance with converting your payroll database to Sage HRMS.
If you need to convert Sage HRMS Link databases or databases you have created for custom applications, you must also run the Data Upsizing Elf (instructions below) after you run the Data Upsizing Wizard.

### Database Structure Changes

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

- An integer type field named **ID_Col** is added to all tables that are automatically populated. The field value increments by one each time a new record is added.
- All date types are converted to date/time types.
- To avoid conflict with T-SQL, all field names that are T-SQL-reserved words (desc, rule, table, and group), are converted to fdesc, frule, ftable, and fgroup.

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

- The Custom Details tables in the custom folder (such as TKSCREEN.DBF and TKTABLES.DBF) are added to the database.
- If any errors occur during the upsize, a message is displayed when the upsize is finished.
- If the table already exists in the target database, it is dropped and upsized again.

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

<table>
<thead>
<tr>
<th>VFP Data Type</th>
<th>SQL Server Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>character</td>
<td>char</td>
</tr>
<tr>
<td>numeric</td>
<td>float</td>
</tr>
<tr>
<td>integer</td>
<td>int</td>
</tr>
<tr>
<td>date</td>
<td>date/time (All empty dates are converted to NULLs)</td>
</tr>
<tr>
<td>logical</td>
<td>bit</td>
</tr>
<tr>
<td>memo</td>
<td>text</td>
</tr>
<tr>
<td>general</td>
<td>image</td>
</tr>
</tbody>
</table>

### To Run the Data Upsizing Wizard:

1. At the server machine, from the Start menu, select **All Programs > Sage > Sage HRMS Server > Data Upsizing Wizard** to open the Data Upsizing Wizard dialog box.
2. Select **SQL Server** as the database destination.
3. In the **Database folder to upsize from field**, select the location of the database folder you want to convert.
4. In the **Temporary working folder** field, select the location of the folder to use for the intermediary files needed during the conversion. The default is `C:\Temp\UpsizeWiz`.

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

   - **Server**. This is stored in the Abrawin.ini file.
   - **Database name**. This is the Live database name stored in the Abrawin.ini file.
   - **User ID**. This is stored in the DBAccount.ini file.
   - **Password**. This is stored in the DBAccount.ini file and is displayed as asterisks.
   - Select the **Photo Settings** tab and set the location for your employee photos.

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

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

8. For Sage HRMS Link and custom databases, see the next section to run the Data Upsizing Elf.

**To run the Data Upsizing Elf:**

1. From the Start menu, select **All Programs > Sage > Sage HRMS Server > Data Upsizing Elf** to open the Data Upsizing Elf dialog box.

2. Select **FoxPro** as the Upsizing database destination.

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

4. In the **Database table(s) to upsize** field, select the database files you want to convert.

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

6. If you are upsizing Sage HRMS tables or developing custom applications and you want to use the Sage HRMS Data Layer to access the data, select **Add Sage HRMS data layer fields to upsized table**.

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

8. When upsizing is complete, click **OK**.
Upsizing Sage HRMS Link and Custom Databases

The Data Upsizing Elf converts Sage HRMS Link databases and custom Visual FoxPro databases (such as those created for custom applications). When you run the Data Upsizing Elf, the structure of the database changes as follows:

- DBF files used in custom applications you have created are converted.
- Selected files from any folder containing DBF files are converted.
- If the table already exists in the target database, it is dropped and upsized again.

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

<table>
<thead>
<tr>
<th>VFP Data Type</th>
<th>SQL Server Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>character</td>
<td>char</td>
</tr>
<tr>
<td>numeric</td>
<td>float</td>
</tr>
<tr>
<td>integer</td>
<td>int</td>
</tr>
<tr>
<td>date</td>
<td>date/time (All empty dates are converted to NULLs)</td>
</tr>
<tr>
<td>logical</td>
<td>bit</td>
</tr>
<tr>
<td>memo</td>
<td>text</td>
</tr>
<tr>
<td>general</td>
<td>image</td>
</tr>
</tbody>
</table>

Upsizing Sage Abra Suite Custom Reports

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

Before You Begin

- You must have Sage HRMS and SAP Crystal Reports ® 2008 installed.
- You must have already used the Data Upsizing Wizard to upsize your HR and Time Off data.

Changing the Data Source

1. Log on to Sage HRMS. You must also be logged on to Sage Abra Suite, because the data source in the reports you are upgrading still references the ADA (Abra Data Access).
2. From the Sage HRMS Quick Launch toolbar, click Crystal > Crystal Reports to launch SAP Crystal Reports. The Welcome to Crystal Reports dialog opens.
3. Open one of your custom reports.
4. From the SAP Crystal Reports main menu, select Database > Set Datasource Location. The Set Datasource Location dialog box opens.
Note: If Sage Abra HRMS Data Access has been created under OLE DB (ADO), select Sage Abra HRMS Data Access, and click Update. Repeat for subreports if needed. If a field name has changed, proceed to the following Field Name Changes section.

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

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

7. Double-click Make New Connection.

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

9. Click Finish. The Set Datasource Location dialog box opens.

10. In the Replace with section, click once to highlight Sage Abra HRMS Data Access.

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

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

Note: You must have the data source to change from selected in the top section and the data source to change to selected in the bottom section before you Update.

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

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

Field Name Changes

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

<table>
<thead>
<tr>
<th>Table</th>
<th>Sage HRMS field name</th>
<th>T-SQL Reserved word</th>
</tr>
</thead>
<tbody>
<tr>
<td>HBEPLAN</td>
<td>FDESC</td>
<td>DESC</td>
</tr>
<tr>
<td>SYREPORT</td>
<td>FGROUP</td>
<td>GROUP</td>
</tr>
<tr>
<td>SYSCHED</td>
<td>FDESC</td>
<td>DESC</td>
</tr>
<tr>
<td>HRTABLES</td>
<td>FDESC</td>
<td>DESC</td>
</tr>
<tr>
<td>HRTABLES</td>
<td>FRULE</td>
<td>RULE</td>
</tr>
<tr>
<td>HRTABLES</td>
<td>FTABLE</td>
<td>TABLE</td>
</tr>
<tr>
<td>TKTABLES</td>
<td>FDESC</td>
<td>DESC</td>
</tr>
</tbody>
</table>
If your report requires field name changes, when you update the data source, the Map Fields dialog box opens.

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

2. Click Map.

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

Checking for Empty Dates

In Sage HRMS, all date fields that do not have a specific date assigned to them are now NULL. If you have any reports in which you check for an empty date in a selection formula using the EMPTY() function, you need to now use the ISNULL() function. The example below shows selecting benefit records in the HBENE table.

Before:

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

After:

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

Use the Database Connection Tool to:

1. Verify an existing database connection.

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

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

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

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

6. Click Test Connections to test for valid connections to the databases. If all connections are successful, the test results display:

![SQL Connection Test Results]

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

7. Click OK to return to the Database Connection Tool dialog box and click Save to establish your database connections.

Re-registering Sage HRMS to Add a New Module or Option

If you have an existing Sage HRMS system and want to add another module or option, simply re-register Sage HRMS. (If you are adding Sage U.S. Payroll or Sage Canadian Payroll you must set up the payroll database. For more information, refer to the Sage Payroll Getting Started Guide.)
Notes:

- Changing the serial number or installation code requires a restart of Sage HRMS.
- If you add U.S. payroll to a Canadian payroll system or add Canadian payroll to a U.S. payroll system, you must change the **Country** setting to **Both** after re-registering and restarting Sage HRMS. (From the Navigation Pane, go to **Setup > System > Setup > Enterprise Setup** to change the **Country** setting.)

1. Have ready your serial number and installation code for the new items you are adding to your system. You can get this information by calling Sage HRMS Customer Service, Monday through Friday from 8:30 a.m. to 5:30 p.m. ET at 800-424-9392.

2. Launch Sage HRMS.

3. Select **Register Sage HRMS** from the Help menu.

4. The Register Sage HRMS dialog box opens.

   This dialog box shows your current serial number and installation code. If you are re-registering to add another module, option, or link, enter your new serial number and installation code. If you want to add the Sage 100 Standard ERP Link, Sage 100 Advanced ERP G/L Link, Sage 500 ERP G/L Link, or Sage ERP X3 G/L Interface, select the associated check boxes.

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

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

   **Note:** When you add a link or interface, they become accessible from the Quick Launch toolbar.

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

   Product updates and Quarterly tax updates for Sage HRMS (including Payroll) are cumulative and the updates are included with this release.

**Uninstalling Sage HRMS 2014**

To completely uninstall Sage HRMS 2014, you must uninstall the clients and the server. If your system includes Sage HRMS Payroll, there are several modules that will also be uninstalled with the process.

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

- Sage HRMS Client
• Sage HRMS Server
• Sage HRMS Payroll Bank Module
• Sage HRMS Payroll General Ledger Module
• Sage HRMS Payroll Sync
• Sage HRMS Payroll System Manager
• Sage HRMS Payroll (U.S. or Canadian) Payroll Module
• Sage HRMS Payroll (U.S. or Canadian) Tax Module

To uninstall Sage HRMS, remove the programs in the order listed. You must have administrator privileges to uninstall.

You can only use the Add/Remove Programs function to uninstall the Sage HRMS application. You cannot use setup.exe to uninstall.

1. Go to **Add/Remove Programs** (depending on your operating system).

2. Remove Sage HRMS Client. Note that when the client is uninstalled, all Sage HRMS Payroll modules are also automatically uninstalled.

3. Remove Sage HRMS Server.