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Sage HRMS

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SAGE HRMS (formerly Abra) NEWSLETTER FEBRUARY 2012

What's Inside

HR Actions For Sage HRMS

Web-based self-service system streamlines delivery of HR services

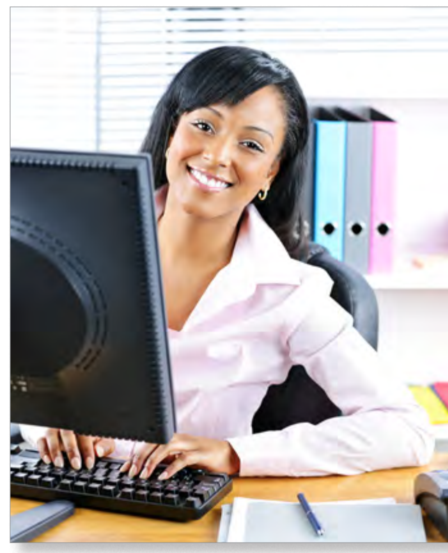
You can revolutionize the workflow of your HR and Payroll departments with the Sage endorsed solution—HR Actions® for Sage HRMS. This self-service, Web-based system streamlines delivery of HR services and makes it easy to collect and approve the data that feeds Sage HRMS.

Streamline Workflows

You can involve the entire workforce, including employees, managers and administrators, and make data entry by HR and payroll staff a thing of the past. Interactive Web-based forms replace paper forms, are easy to use, and result in submitted forms that are complete, accurate, and secure.

HR Actions can automate the collection of data directly from employees using employee-initiated forms such as skills and time-off and leave requests. Employees can complete self-appraisals and complete the final sign-off after meeting with their supervisors. Your HR and Payroll-related activities can become more efficient and consistent, while HR and payroll workers maintain complete control.

HR Actions can automate nearly every manager-initiated personnel action including hiring requests, promotions, transfers, pay changes, job changes, and termination requests. Managers can initiate forms for their direct and skip-level reports. Forms for existing employees show current values side by side with fields to enter the requested changes. Managers are notified by email of forms needing approval and can cancel or see the status of a form while it is being routed for approval.



Build Efficiency

Efficiencies are created with the ability to create, route, and approve forms via self-service. Setup is easy even for non-technical Sage HRMS users. The forms you design can be simple and error-free with easy-to-use dynamic fields. Updated forms are immediately available to the organization, accelerating HR and payroll transactional processing.

Create Consistency

The HR Actions workflow engine is designed to meet your business needs, so you don't have to change your business processes to match a fixed workflow. Without

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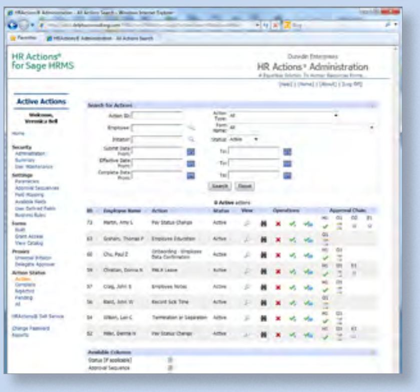
HR Actions For Sage HRMS *(continued from cover)*

ZOOM IN



The HR Actions Administration screen makes it easy to review the status of all HR forms in process and check where they are in the approval chain.

any programming, you can define business rules that determine how many approvals are required and the sequence of the approval chain. Routing rules can be based on individual forms, business units, or the type of change being requested. You can ensure all required fields are properly completed using the Sage HRMS codes and business rules. Forms display current data, and you can configure an unlimited number of approval levels for each form.

Approvers can be any number or combination of HR executives, supervisors, or an unlimited number of named role-based approvers. The Web-based workflow enforces your internal policies for required approvals. Forms are automatically routed electronically for online approval.

Monitor And Control

HR Actions gives you the ability to monitor forms throughout the entry and approval process. Managers and HR staff have real-time visibility into the forms being routed for approval. It is easy to see who has approved forms, where bottlenecks exist, and to view the content of forms wherever they are in the process. HR can control the flow of a form at any time by advancing it to the next approver, pushing it through the entire approval sequence or canceling the form. HR controls the final update of Sage HRMS for each approved form. Audit capabilities are enhanced with centralized access to information.

Forms For The Entire Employment Life Cycle

HR Actions ships with more than 30 example forms that encompass the entire employment life cycle, from pre-employment to retirement. Templates make it easy to get started; each form can be configured to your organization's needs or copied to be used as the basis for your own custom form. Forms are built using a wizard and no programming skills are required. Example forms included with HR Actions:

Pre-Employment / Onboarding

» Requisition to Hire
» New Hire
» Rehire

Employee Self-Service

» Personal Details
» Forwarding Address
» Sick Time
» FMLA/LOA Request
» Custom Details
» Goal Setting
» Performance Appraisal

Manager / HR Self-Service

» Transfer
» Promotion
» Pay Status
» Attendance Adjustment
» Corrective Action
» OSHA Incident
» FMLA/LOA
» Retirement
» Termination/COBRA
» Custom Details
» Goal Setting
» Performance Appraisal

Increase Productivity

With the elimination of paper forms, transaction throughput is increased and manual data entry is reduced. Everyone saves time as approved forms update Sage HRMS with a click of the mouse.

New HR Actions Version 10.2

HR Actions Version 10.2 is now shipping, and is compatible with Sage HRMS, (Versions 10.1 and 8.x) and Sage Abra Suite HRMS (Versions 9.x and 7.7x). This version offers new features that make it even easier to complete online forms and includes enhanced employee onboarding capabilities.

Call us with your questions or for a demonstration of HR Actions for Sage HRMS.

Headline News

Sage North America has announced a partnership with Cornerstone OnDemand, a global provider of comprehensive learning and talent management software and services. The solution is designed to help organizations empower their people and maximize the productivity of their workforce.

Tips: Synchronizing Attendance Plans With Payroll

Here we offer some tips to ensure that payroll and time-off management are synchronized.

Setting Up Attendance Plans

1. From the Navigation Pane, select Attendance/Rules/Attendance Setup. If there is more then one company, the Employer Selection dialog box will open. Double-click the employer to open the Attendance Setup dialog box.
2. If the employer operates on a fiscal year, enter the date on which the fiscal year starts. At the end of the fiscal year, time off management performs year-end carryover calculations on the same date for each employee and for all plans based on the fiscal year. For example, if the system is to perform all carryover calculations on June 30 each year, set the Fiscal Year Start to July 1.
   Note: If the plan is based on an annual or anniversary year, then the Fiscal Year Start does not have to be entered.
3. Choose the Absence Units, either Hours or Days, by which the company wants the system to accrue time. The Absence Transaction is in the same type of Absence Unit.
4. Select from zero to five decimals places for the Absence Units.
5. If the company wants Payroll to update absence transactions for employees' time sheets, check Receive Payroll Time Sheets. The time sheet earning must be linked to an absence reason code and the earnings category must be correct: V for vacation, S for illness, or W for personal.
6. If the company wants Payroll to update attendance accruals, check Link Payroll to Attendance for Accruals. All leave plans' accruals that are based on attendance plan rates in Payroll will update the plan in time-off management with accrual amounts.

7. Additionally, in the payroll rules select Payroll Setup and the employer that is being worked with. Set each appropriate leave type on the Accruals tab to Attendance Plan Rates. The rate should be set to 0.00.
8. Click OK when the set up is completed.

Verifying Payroll Setup

1. From the Navigation Pane, select Payroll/Details/Accruals.
2. Select an Employee.
3. On the Vacation, Personal, and Illness accruals select *Attendance Plan Rates* for the *Accrual Type*. This must be selected on every employee page.

» To verify the accrual type for all employees, modify the Employee Quick Look report located in the Payroll folder in Crystal Reports®. Add the fields **p_illind** (illness indicator), **p_perind** (personal indicator), and **p_vacind** (vacation indicator) to the record line. Print or preview the report and verify all employees have an "A" have Attendance Plan Rates selected for the Accrual Type. A = Attendance Plan Rate, H = Hours Worked, and P = Pay Period. A blank indicates no value has been selected. To correct a blank, deselect and reselect the Accrual Type for the employee.

Attendance Pages

1. From the Navigation Pane, select Attendance/Details/Attendance Summary.
2. Select an employee.
3. Make a note of the As Of Date for the plans being used.
4. From the Navigation Pane, select Payroll/Rules/Pay Group Setup. Detail the pay group being used and make a note of the Last Pay Period End Date.
5. The *Last Pay Period End Date* and the *As of Date* must be identical.
6. To match the two dates, from the Navigation Pane, select Attendance/Details/Attendance Summary. Click *Accrue Time* and enter the Last Pay Period End Date noted earlier. Click OK.
7. This may also be done for selected or all employees under the Accrue Time process.
8. From the Navigation Pane, select Attendance/Processes/Synchronize Accruals.
9. Select the employer and select *Update Payroll with Attendance*.

The balances on the employee's Accruals detail will now match the balances on the employee's Attendance Summary panel and will synchronized for any subsequent payroll.

CRM Corner: Is CRM Worth a 2nd Opinion?

By M. Danny Estrada, Net@Work CRM Practice Director

On the first day of the New Year I ended up in the Northeast to spend all day with a client that came to us last year from another reseller. We have a significant number of these customers and we hear from companies like this several times every month. One of the reasons many people come to work with us if for the expertise we carry in not just ERP but also areas like CRM (Customer Relationship Management). Sage has a range of options for CRM products and they are all integrated to various ERP applications. In addition, there are also some options for 3rd party integrations between various Sage products that have been around for years.

I decided to write this section for the CRM Corner because there were a number of things that we see regularly when discussing CRM with clients that did not use us for their original implementation. As with any application there are nuances with each dealer and their approach to implementing a particular technology and we are not looking to challenge or evaluate the creative license or methodology a firm uses when configuring or setting up an application like CRM. What we do understand is that there are two distinct bodies of knowledge when it comes to the consulting and implementation of an ERP system and the undertakings of deploying a CRM system efficiently and effectively. And, going back on more than 10 years of track record with bringing on these types of clients, we have consistently seen a number of areas of concern when it comes to how CRM has been implemented and the information that has been communicated to many organizations trying to have a complete front and back end that complement each other nicely.

The first thing to understand is that the approach to implementing ERP and CRM are drastically different. When deploying an accounting solution it's not like you get a second shot at configuring the GL or deciding that you need Project Accounting after you find out your chosen system isn't particularly robust in that area. The nature of CRM is that it is highly flexible and in many cases you don't need to have all of the answers on day one. In fact, one of the best practices is to get a foundation set and then modify the solution to meet market demands over time. Many CRM shops use the phrase, "Rapid implementation and gradual customization." When it comes to customization the CRM tools are very adept at handling modifications without hampering upgrades or needing source code.

The other great pitfall we have seen in the way of implementation relates to the experience of the consulting partner with the particular CRM application that integrates with the ERP systems they support. In many cases there are limited resources and ERP consultants take on CRM like they would another module of the ERP system. There is inherently nothing wrong with this other than the fact that in many regards the CRM capabilities are just as robust and expansive as what you would find in an ERP system. For this reason we find that in most cases it is extremely challenging to be an "expert" at both ERP and CRM. The bigger challenge is that in many cases the consulting firm does not communicate their lack of expertise to the client.

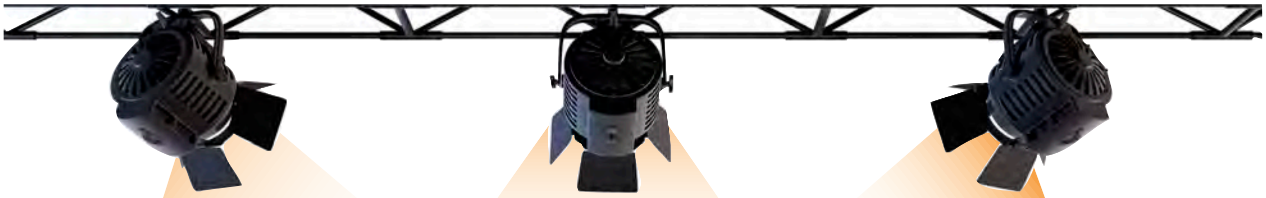
We have found in many implementations that there are challenges related to data migration, core functionality, integration and customizations or workflows that are possible within the CRM framework. As a consultant it is difficult for many small firms to admit that they are not experts in this area and many times we find out that customers have been told that functionality or capabilities do not exist in CRM. The response by many of these clients is that they were told that the company deploying CRM was "certified" on the particular application they chose for CRM. As those of us in the industry know too well there is a vast difference between certification and competency.

At the end of the day most organizations are looking to get the most out of their systems to increase productivity and efficiency of their people. We truly understand this and this is why we like to perform forensics and analysis for all of our clients that come to us from another partner so that we can quickly assess and provide recommendations or at least validate the work that has been done. If you have previously tried to deploy CRM or would like to understand how we can help you improve your bottom line with an integrated system (even if the front or back end are not from Sage) then give us a call and we can give you a second opinion.

Upcoming Webinars

Sage HRMS (Abra) Update:
New Versions Review and Upgrade Timing
netatwork.com/HRMSWebinars

Employee Recruiting Made Easy
Cyber Recruiter for Sage HRMS
netatwork.com/HRMSWebinars



IN THE SPOTLIGHT:

Cyber Recruiter Helps You Find, Track, And Manage Applicants

The investment in an employee starts even before the actual hiring, and the costs of finding a new employee go way beyond posting a job opening. Cyber Recruiter® for Sage HRMS powered by Visibility Software is a Sage Endorsed Solution. It helps hiring managers and recruiters manage and communicate during the entire recruiting process to fill open positions quickly and efficiently.

Cyber Recruiter can help you easily find, track, and manage applicants while reducing the burden on recruiting and hiring managers. Highly configurable, paperless, and process-oriented, Cyber Recruiter streamlines procedures to attract and retain talented workers. This in-house, Web-based tool supports multiple browsers, including Internet Explorer, Safari, and Firefox.

Cyber Recruiter Benefits

» **Up-To-Date Postings:** Post open positions to your company's career page and upload them to leading online job boards like Monster.com and Careerbuilder.com automatically.

» **Intelligent Search Capability:** Locate appropriate candidates using a flexible and powerful resumé search functionality.

» **Efficient Scheduling**: Simplify interview scheduling with built-in mechanisms for gathering candidate-related feedback in a timely, process-oriented manner.

» **Automated Email Responses:** Stay on top of every aspect of your recruiting process.

» **Comprehensive Content Management:** Empower users to manage content and easily configure layout and display.

» **Customizable:** Match the career page to your existing website's look.

» **Seamless Integration:** Integrate an online application with your corporate website to gather vital applicant information, such as position-specific screening questions.

» **Advanced Interface:** Interface with background screening companies as well as with your Sage HRMS solution.

» **Robust Reporting:** Leverage powerful applicant and requisition reporting capabilities that include both standard reports and an ad hoc web-based reporting tool.

» **Employee Access:** Enable employees to quickly update their resumé information and track employee referrals.

Product Options

Business needs vary, so Sage offers different product levels. You can choose the product level that best fits your needs.

» **Express:** A full-service applicant tracking solution.

» **Professional:** Adds advanced features like employee referral tracking, report writer tool, and hiring manager access.

» **Enterprise:** Manage subsidiaries in multiple-entity organizations effortlessly.

Credit For eRecruiter Users

If you were previously using eRecruiter for Sage HRMS, you are eligible for a credit towards your investment in Cyber Recruiter equal to the value of Cyber Recruiter Express. Any support balance for eRecruiter may be applied to Cyber Recruiter as well.

Give us a call with your questions.

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