



STAR-INFO

Newsletter for Sage Abra HRMS

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Headline News

SupportPlus Has A New Name

The Sage Abra SupportPlus program now has a new name: Sage Business Care. If you were a Sage Abra SupportPlus member, your plan transitions to the new Sage Business Care Silver Plan at no additional cost. You will still receive technical assistance, troubleshooting, software upgrades, quarterly tax updates, and help from the Sage Abra support team.

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Find Employee Records Faster

New Employee Find Capabilities Offer Quick Access To The information You Need

If you frequently search for employee records, whether for an individual or a group of employees with a certain common characteristic, the most recent releases of Sage Abra HRMS speeds this task. In both Sage Abra Suite Version 9 and Sage Abra SQL HRMS Version 10, enhancements were made to the Employee Find function. In this article we cover the new functionality in depth, and provide some examples of how you can use it to save time and effort.

The Employee Find capability now is available on the Navigation Pane after you access a Group, such as Employees or Training. You use it to find and select an employee before you complete tasks or processes in the application. For example, if you select Employees/View/Edit Employee, you need to search for an employee before you go to the Employee Detail pages to view or edit.

Multiple Filtering Options

The power of the new Employee Find comes from several new capabilities, including the following:

- When you begin typing a value, the system will automatically start to display all the records in the system that match. For example, you could search by a first name, such as John, and the system will display all the matching employees and allow you to quickly select the one you are looking for.
- You also can search the system based on Employee status. For example, you may want to see at a glance how many



employees are on leave of absence, or how many dependents are in the system for whom you are paying health insurance premiums. The statuses you can select from are Active, Terminated, LOA (Leave of Absence), and Other. Note: The Other status may be used for dependents or other non-employees.

- You can use several different fields in combination to narrow your search. You can use any combination of the Last Name, First Name, ID, and SSN fields to find the employee you are looking for. For example, if you are doing a search by the Last Name and First Name, the First Name search field will act as a filter, while the Last Name field will act as a go-to feature and will navigate you to the employee on the results list that matches both criteria.

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Find Employee Records Faster

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Quick Matching Of Data

If you start typing a value in a search field and there is a match, the record is highlighted in the search results. An arrow indicator appears next to the record. After you have found the record that you are searching for, you can click OK, or double-click the record to view the detail page for that employee.

If you start typing a value in a search field and there is no match, a *Not Found* message appears to the right of the search field.

Search Results Retained

With Sage Abra Suite Version 9 and Sage Abra SQL HRMS Version 10, the results of your searches are retained for future use. For example, if you search for employees on a detail page, then go to a report page to print a report, when you return to a detail page (the same or a different one), the system remembers your previous search results. The results appear so you can select the same employee (highlighted) or a different employee from the list.

Advanced Employee Find

The Advanced Employee Find is accessed by clicking the More Options button on the Employee Find page. The following additional search criteria will appear for selection when it is expanded:

- Organization Levels
- Supervisor
- Employee Type
- Salaried/Hourly
- State
- Job Title
- Last Hire Date

As with the regular Employee Find, the search results automatically are filtered based on the criteria entered in these fields. With Advanced Employee Find, it is easy to find all the employees who report to a particular manager, or all the director-level employees, or any employee who lives/works out of state.

Please give us a call for assistance in making optimum use of the new Employee Find capabilities now available in Sage Abra Suite Version 9 and Sage Abra SQL HRMS Version 10. ✨

Headline News Continued

The Sage Business Care Silver Plan includes three new benefits:

- Live-chat assistance
- Discounts on Anytime Learning courses
- Savings on Sage Summit conference registrations

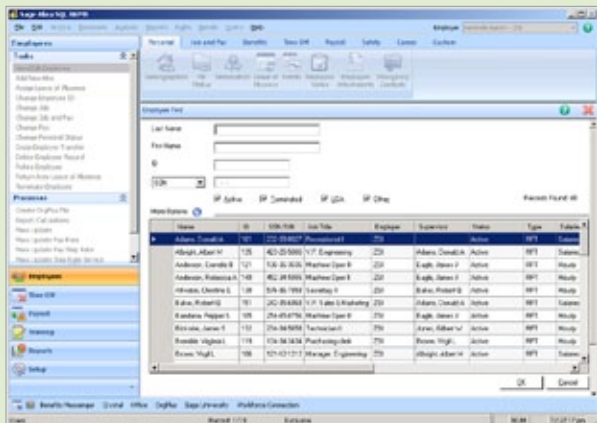
You will have access to the latest Sage Abra software release with updated functionality.

Call us to renew your plan.

New Sage Business Care Gold Plan

With the name change to Sage Business Care, Sage also is offering a new Sage Business Care Gold Plan. The Gold Plan provides unlimited access to informative webcasts and Anytime Learning courses, more substantial product and training discounts, unlimited support, and access to the new Sage Employer Resources advice portal. If you have questions or would like to upgrade to the Sage Business Care Gold Plan, please call us. ✨

ZOOM IN



The new Employee Find remembers your criteria, so you can find a group of employees, print a report, and then return to your selection.

Using Expression Builder To Refine Reports

When printing Sage Abra Suite reports, many users find they would like to filter the data in ways not available in the standard reports. It is relatively simple to change the data that prints using the Expression Builder in Visual FoxPro. Here we provide some common examples.

Expanding Criterion On Reports

Sometimes you may need to include more specific information than is available on a standard report. For example, you may want to print a report only for employees with activity within a specified date range, or you may want to include employees on Leave of Absence (LOA). Using Custom Criteria, you can select active employees by a specific date or date range on most standard reports.

To create a custom filter, after you select the report you want, navigate to:

1. Standard Criteria, Custom Criteria
2. Select Visual FoxPro Expression Builder

Three Examples

Here are just three examples of how you can modify the report results to include the information you desire. Note: Be sure to type the expression exactly as shown with all the parentheses, changing dates as appropriate.

1. All active employees as of:

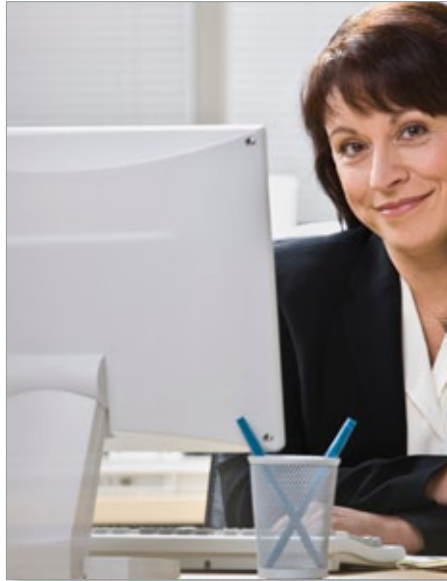
The following expression will produce a report showing all Active employees as of 03/31/2010.

```
Pe.p_orphire<={03/31/2010}and (Pe.p_active="A" or (Pe.p_active="T" and Pe.p_termindate>={03/31/2010}))
```

2. All active employees in a date range:

The following expression will produce a report showing all Active employees inside of date range 01/01/2010 to 03/31/2010.

```
Pe.p_orphire<={03/31/2010} and (Pe.p_active="A" or (Pe.p_active="T" and Pe.p_termindate>={01/01/2010}))
```



```
termindate>={01/01/2010}))
```

3. All active employees in a date range

plus employees on LOA: The following expression will produce a report showing all Active employees in date range 01/01/2010 to 03/31/2010 plus LOA employees:

```
Pe.p_orphire<={03/31/2010} and (INLIST(Pe.p_active,"A","L") or (Pe.p_active="T" and Pe.p_termindate>={01/01/2010}))
```

Note: When using custom criteria on a standard report, other fields on the standard criteria tab will not be available, except for Employer. If there is a need to add other items from the standard criteria to the employee selection, add them to the custom criteria.

Removing Terminated Employees From Standard Payroll Reports

Many payroll reports include all employees, including those that have been terminated. You can easily filter out terminated employees by setting the criteria to not include employees with 0.00 earnings. You can use any one of the year-to-date, quarter-to-date, month-to-date,

or current earnings fields to create the filter. This will work for the Employee Earnings register, Employee Deductions register, and Employee Tax Withholdings register. Select Custom Criteria, FoxPro Expression Builder. Enter the following expression to filter out all employees with no year-to-date earnings:

```
Err.ytdamount<>0.00
```

You can use the expression above and replace the field name with any of the following values to remove employees without quarter-to-date, month-to-date, or current earnings respectively: Err.qtdamount, Err.mtdamount, or Err.curramount.

Using Mass Update To Change Status To Inactive

If you prefer not to use custom criteria each time you print the Employee Earnings Report, you can instead perform a mass update to change the terminated employee's Earning Code status to Inactive and then run the report for All Active Earnings. This can be accomplished using the following steps:

1. Backup your data before performing any mass update.
2. From the Activity Center, select Payroll, Processes, and Mass Update.
3. Update File: Employee Earnings Register
4. Update Field: Earning Code Status
5. Records to Update: Empno= (enter employee's ID number)
6. New Value: "I"
7. Press **OK** to start the Mass Update process.

Please give us a call for assistance using the Expression Builder and Mass Update processes. ✨



IN THE SPOTLIGHT:

HR Actions Automated Workflow

No doubt a big portion of your time is spent processing employee forms, from hiring to performance appraisals to termination. A new Sage Endorsed Solution, HR Actions® for Sage Abra HRMS® powered by Delphia Consulting, can help you streamline the completion and approval of forms using the Web. The Web-based service allows you create web forms easily using any fields from Sage Abra HR. Let's take a closer look.

Easy-to-Use Form Builder

A wizard guides you through the process of building web forms using any field from Sage Abra HR, including custom fields. You can start with one of the sample forms provided or build a new one from scratch.

Flexible Rules-Based Routing

The HR Actions workflow engine allows you to define routing rules. Without any programming skills, you can set rules that delineate how many approvals are required and the sequence of the approval chain. Once forms are approved, one-click updates the information to Sage Abra, eliminating data entry from paper forms.

Employee Self Service

With HR Actions you can automate the collection of data from employees, such as skills, self-appraisals, and time-off requests.

Manager Self Service

Managers can initiate personnel actions such as hiring, promotions, transfers, pay changes, and termination requests for both

direct and skip-level reports. Managers are notified by e-mail of forms requiring approval and can see the status of a form or cancel it while it is being routed for approval.

Real-Time Visibility

Managers and your Human Resources department have real-time visibility of forms being routed for approval. It is easy to see who has approved forms, where bottlenecks exist, and to view the content of forms. The Human Resources department can control the flow of a form by advancing it to the next reviewer, pushing it through the approval sequence, or cancelling the form. The Human Resources department controls the final update to Sage Abra for each approved form.

Supports Complex Processes

The performance appraisal process is often complex. HR Actions can automate the most complex performance appraisal process. Forms can include instructions, competency ratings, review questions, goal setting, development plans, narrative responses, rating scales, and weighting. HR Actions supports self-appraisals, manager appraisals, and unlimited back and forth between the employee and manager before routing for additional management and HR approvals.

Detailed Audit Trail

Every form has a permanent audit trail with time-stamped information about reviewers' actions and comments, edits to the data made during routing, and the final disposition of the form.

Security

HR Actions uses advanced security and data encryption to keep your confidential employee data safe and secure.

HR Actions is compatible with current versions of Sage Abra SQL HRMS and Sage Abra Suite. Call us with your questions. ✨

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