Sage HRMS 2014

Sage Employee Self Service

Installation and Setup Guide

October 2013

This is a publication of Sage Software, Inc.

Document version: April 17, 2014

Table of Contents

Overview

Important! Before beginning this installation, read the *Sage Employee Self Service Pre-Installation Guide*. This product should be installed only by a **certified** Channel Partner or member of the Sage Professional Services Group.

This guide is provided to help you install and set up Sage Employee Self Service (Sage ESS). It includes the following topics:

- Install Sage Employee Self Service
- Upgrade Sage Employee Self Service to version 2014
- Sage Employee Self Service System Maintenance
- Set Up Sage Employee Self Service

Critical Information for Security

Important!

It is of critical importance for the security of company and employee data that the Master password is set to a **strong** password after the installation of Sage Employee Self Service. A strong password is one that is hard to detect both by humans and by a computer program. Two things make a password stronger: (1) a larger number of characters, and (2) mixing numeric digits, upper and lower case letters and special characters ($, #, etc.).

For instructions to change your Master password, see Help in Sage HRMS or Sage Employee Self Service, or contact Sage Customer Support at 1-800-829-0170. (U.S.) or 1-800-330-2607 (Canada).

Installing Sage Employee Self Service on a New Server

Follow these instructions and cautions if you are installing Sage Employee Self Service for the first time.

Before You Begin

- You must install Sage HRMS before you install Sage Employee Self Service. Refer to the *Sage HRMS Installation Guide* for instructions.
- If you are loading Sage Employee Self Service from a network drive, we recommend that the files are copied to a local drive or that the network connection be initialized during startup.
- Do not install Sage Employee Self Service on a Windows Server that is an Active Directory or Domain Controller. Microsoft does not recommend this course of action and Sage does not support this configuration.
- You must back up your Sage HRMS system using your external backup procedures. Make sure everyone has exited Sage HRMS before beginning the backup and installation.
- You must have Administrator access (Local Administrator access is preferred) and access to the Sage HRMS data to perform the Sage Employee Self Service installation.
- Your Sage HRMS database must be accessible through a local or UNC path (Windows share) from your Sage Employee Self Service server.
- If you are installing Sage Employee Self Service on a Windows 2008 server, you must disable User Account Control (UAC) before you install. When installation is complete, remember to re-enable it.
- Currently, Sage Employee Self Service can be used on the same server as Microsoft Windows SharePoint Services 2.0. However, Sage does not recommend this and cannot assist customers with issues that may result from this type of installation. Customers who pursue this type of installation must install SharePoint Services 2.0 on a site other than the default website. Sage Employee Self Service will be installed to use the default website. Adding SharePoint Services to the default website will prevent access to an installed version of Sage Employee Self Service.

  To troubleshoot installation issues, visit:

  www.microsoft.com/resources/documentation/wss/2/all/adminguide/en-us/stsi01.mspx
- When you enter text in fields on the installation pages (such as the 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 special characters (#, -, @ or punctuation marks).
- For supervisors who have more than 500 direct/indirect reports, a "Request timed out" error may occur, which causes their direct reports to not display. Complete the following steps to resolve the error:

In IIS v6.0:

1. Launch Internet Information Services (IIS) Manager.
2. Right-click **Websites** and select **Properties**.
3. Change the **Connection timeout:** field to **315** seconds and click **Apply**. The Description field containing Default Website should automatically update. Click OK.
4. After changing the settings for the Websites, the World Wide Web will need to be restarted.
5. Launch **Administrative Tools > Services** and right-click World Wide Web and select Restart.

In IIS v7.0:

1. Launch Internet Information Services (IIS) Manager.
2. Click **Sites** then click **Set Website Defaults** to open the Website Defaults dialog box.
3. Expand the Connection Limits node and set the **Connection Time-outs** field to **315**.
4. Restart the World Wide Web service.

Installing Sage Employee Self Service

Note: If you are installing Sage Employee Self Service on a Windows 2008 or 2012 server, you must disable User Account Control (UAC) before you install. When installation is complete, remember to re-enable it.

1. Open the Sage Employee Self Service v2014 installation package. Double-click the **setup.exe** file. The Welcome dialog box opens. Click **Next**.
2. In the License Agreement dialog box, read the License Agreement. Select **I accept the terms of the license agreemen**t and click **Next**.
3. In the Customer Information dialog box, enter your **User Name**, **Organization**, **Serial Number**, and **Install Code** and then click **Next**.
4. In the Destination Folder dialog box, select the path and directory where you want Sage Employee Self Service and components installed (local drives only). The server can be the same as the Sage HRMS server, but this is not a requirement. Click **Next**.
5. In the Sage HRMS SQL Server Setup dialog box, specify the server configuration for the Sage HRMS database. Enter the **Server Name**, **User Name**, **Password**, and **Database**. Click **Next**.
6. In the Sage Employee Self Service Web Alias dialog box, the Name/Alias defaults to **selfservice**. This is the **Name/Alias** that is used when you access Sage Employee Self Service from your web browser. If you want **selfservice** as your **Name/Alias**, click **Next** to accept this name. Otherwise, enter the appropriate **Name/Alias** and click **Next**.

7. In the Email Configuration dialog box, you must select **Enable Emails (SMTP)** to install Sage Employee Self Service. If you do not want Sage ESS to send emails automatically, you can disable this setting on the System Maintenance page later. If you choose to maintain this setting, you must configure your SMTP server before you can enable email delivery. Click **Next**.

8. In the SQL Server Setup dialog box, indicate whether you are using SQL Server 2005 or SQL Server 2005 Express Edition, or SQL Server 2008 (the default database embedded with Sage Employee Self Service). Enter **Server Name**, **User Name**, **Password**, and **Database**. If you are using SQL Server, you must provide a SQL Server logon that has been given dbo (database owner) permissions. Click **Next**.

9. In the Ready to Install the Program dialog box, click **Install** to proceed with the installation.

10. The system displays Installation dialog boxes indicating the progress of the installation.

11. When the InstallShield Wizard Completed dialog box displays, click **Finish**.

12. When installation is complete, click **Yes** to restart your computer.

Note: If you installed on a Windows 2008 or 2012 Server, remember to re-enable User Account Control (UAC).

---

13. After your computer restarts, select **Start > All Programs > Sage Employee Self Service > System Maintenance** to open the **System Maintenance** page. (For details on the System Maintenance page, go to page 13.)

14. Review the information on the **Configuration and Settings** tab and then click **Save**.

15. Click the **SQL Maintenance** tab and verify the path for your Sage Employee Self Service database backup file.

16. Click **Backup** and confirm the action to start the process. An indicator shows the process as it runs and a message displays when it is finished.

17. Click the **Duplicate Key Report** tab and **Run Report** button. This verifies that you can access the Sage HRMS data location and that the user account to access Sage HRMS data is correct. If there are errors in the database, give the report to the person responsible for maintaining the data so they can fix the errors. Refer to Duplicate Key Report on page 17 for more information.

18. Close the System Maintenance page.

19. If you installed Sage Employee Self Service on a Windows 2008 64 bit server, do the following procedure to avoid an "**Access to the temp directory is denied…**"error message (otherwise, skip to the next step).

    The following steps show how to set the Application Pool Identity to use an administrator account when running Sage Employee Self Service on a Windows 2008 or 2012 64 bit server:

    a. On the Sage Employee Self Service server, select **Start > Administrative Tools > IIS Manager**. In **Connections**, select **<servername>Application Pools**.

    b. In **Application Pools**, select **AbraAWCAppPool**.

c. In **Actions**, select **Edt Application Pool > Advanced Settings…**

d. In **Advanced Settings**, select **Process Model > Identity.**

e. In the **Application Pool Identity** dialog box, select **Custom account** and set it to **<servername>\user**, where **user** is a user with an administrator account

20. Launch Microsoft Internet Explorer on any client workstation connected to the server (but not the server itself) and enter the following URL in the **Address** field:

    http://<YourServer>/<ConfiguredVirtualDirectoryName>

    For example: **http://localhost/selfservice**

    If you already have a domain name for external access and intend to use https, enter:

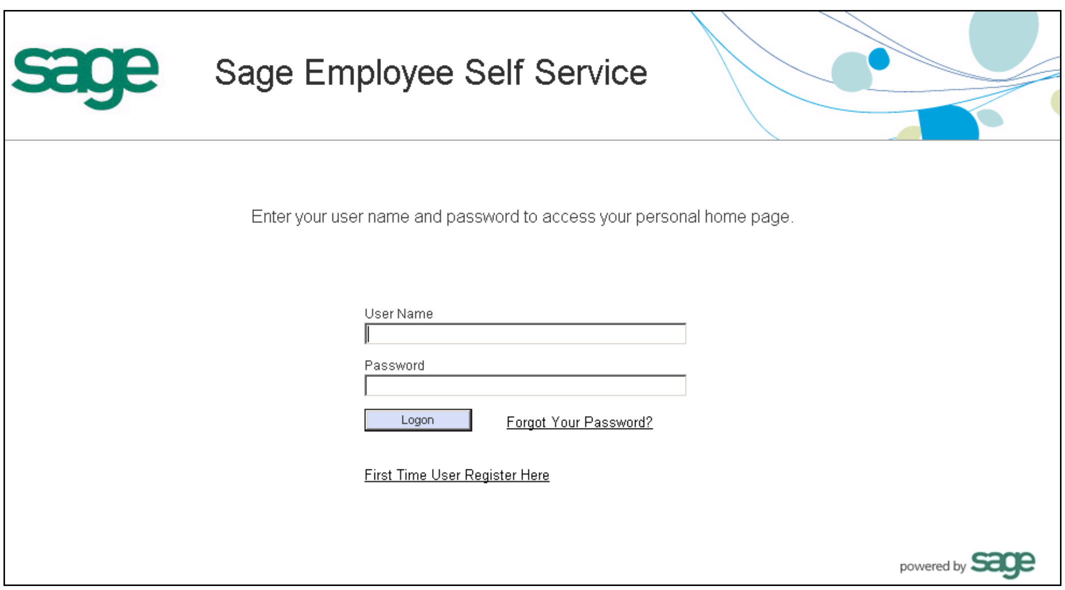
    https://<Server.Domain.TopLevelDomain>/<ConfiguredVirtualDirectoryName>

Notes:

- The <ConfiguredVirtualDirectoryName> is the **Name/Alias** you entered in step 12 above.
- You must enter the URL exactly as the Sage HRMS client calls it, as this is what is stored in Sage HRMS to allow access to Sage Employee Self Service. The system stores the Sage Employee Self Service URL in the SYENTER system table as **E_AWCURL**

---

21. The Sage Employee Self Service logon page opens. The following figure shows the logon page for a system that is **not** using Active Directory Authentication for logons (set on the System Maintenance page).



22. You must complete this setup step **immediately** after you install or upgrade to Sage ESS 2014.

a. Log on as the MASTER user. That is, enter **MASTER** for User Name and **MASTER** for Password.

b. Select **System Administrator > Roles and Logon > Logon Setup** to open the Logon Setup page.

c. At the bottom of the page, select five security questions you want to present to a user when they attempt to create a new logon. When an employee creates a new logon, they must select one of the five security questions and provide a security answer. The question is then presented when the employee attempts to change or reset their password. If the answer does not match the answer they created, they are returned to the Employee Logon page with a message that the Logon information could not be verified.

d. Click **Save** to set the security questions.

23. Installation is now complete and you are ready to start using Sage Employee Self Service. Refer to "Setting Up Sage Employee Self Service" on page 22.

Upgrading Sage Employee Self Service

Before You Begin

- Verify that Sage HRMS has been installed and is working correctly.
- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access the Sage HRMS data.
- If you are using Sage Employee Self Service/Open Enrollment, make sure all enrollment periods are closed, and that all users have exited and logged off from Sage HRMS and Sage Employee Self Service before beginning the backup and upgrade.
- When the upgrade is complete, you will be instructed to restart your computer. Therefore, before you begin the upgrade, we recommend you make the necessary preparations for this required restart.

Upgrading Sage Employee Self Service

1. Using your external backup procedures, do a backup of the Sage HRMS and Sage ESS databases to a media device that is **external** to your Sage HRMS and Sage ESS servers.
    a. Log on to the Sage ESS server and select **Programs > Sage Employee Self Service > System Maintenance** to open the Sage ESS System Maintenance page.
    b. On the **Configuration and Settings** tab, in the Sage Employee Self Service section, select the **Locked** check box.
    c. Click **Save**.
    d. Go to the **SQL Maintenance** tab, verify the Backup File Path is correct, then click **Backup**, and confirm the action to start the process.
    e. When the backup is finished, go to the **Configuration and Settings** tab and clear the **Locked** check box.
2. Prepare to upgrade Sage ESS by closing all Windows applications you have running.
3. Open the Sage ESS 2014 installation package and double-click **setup.exe**. The Installation dialog box opens.
4. Select Sage Employee Self Service and then select Install Sage Employee Self Service.
5. The installation program detects that a previous version of Sage Employee Self Service has been installed. Click **Next**.
6. On the Sage HRMS Database Type dialog box, select the **SQL Server** database type and click **Next**.

7. On the Sage HRMS SQL Server Setup dialog box, enter **Server Name, User Name**, **Password**, and **Database**. If you are using a SQL database, you must provide a SQL Server logon that has been given dbo (database owner) permissions. Click **Next**.
8. On the Ready to Install the Program dialog box, click **Install** to proceed with the installation.
9. The system displays Installation dialog boxes indicating the progress of the installation. When the InstallShield Wizard Completed dialog box displays, click **Finish**.
10. When the upgrade is complete, click **Yes** to restart your computer.
11. After your Sage Employee Self Service server restarts, from the Start menu select **All Programs > Sage Employee Self Service > System Maintenance** to open the System Maintenance page. Click the **SQL Maintenance** tab and verify or enter the location and name of your Sage Employee Self Service database backup file.
12. Click **Backup** and confirm the action to start the process. An indicator shows the process as it runs and a message displays when it is complete.
13. Click the **Configuration and Settings** tab and click **Save**. Exit System Maintenance.
14. You must complete this setup step immediately after you install or upgrade to Sage ESS version 2014.
    a. Log on to Sage ESS as the MASTER user. That is, enter **MASTER** for **User Name** and **MASTER** for **Password**.
    15. Select **System Administrator > Roles and Logon > Logon Setup** to open the Logon Setup page.
    16. At the bottom of the page, select five security questions you want to present to a user when they attempt to create a new logon. When an employee creates a new logon, they must select one of the five security questions and provide a security answer. The question is then presented when the employee attempts to change or reset their password. If the answer does not match the answer they created, they are returned to the Employee Logon page with a message that the Logon information could not be verified.
    17. Click **Save** to set the security questions.
18. The upgrade is now complete and you are ready to start using Sage Employee Self Service.

Sage Employee Self Service System Maintenance

After you have installed Sage Employee Self Service, use the System Maintenance page to configure your system, diagnose and troubleshoot errors, and check for invalid Sage Employee Self Service logons.

The System Maintenance page resides in a secure location on the server where Sage Employee Self Service is installed. To open the page, you must have access to this local computer.

From the Start menu on your Sage Employee Self Service server, select **All Programs > Sage Employee Self Service > System Maintenance**. Click the tabs on the page to do the following:

- Set configuration and default settings
- Perform SQL maintenance
- Review server errors
- Review benefit calculation errors
- Create keys to link Sage Source
- Run the Duplicate Key report
- Remove invalid logons
- Configure Web security

Note: If errors occur, they display in the blank area at the top of each page. If the entire message does not fit in the area, rest the pointer over the message to see it in its entirety.

Configuration and Settings

This tab is used to review or modify system information such as the SQL database connection, Sage HRMS data location, and your install code, serial number and product licensing. These are system-specific settings that must be configured in order for Sage Employee Self Service to function. The configuration values are set during the installation of Sage Employee Self Service, but you can modify them on this tab.

When you click **Save** to save your changes, the utility validates information on this tab and returns error messages when you enter invalid information.

Important! You cannot save any information in the System Maintenance utility or proceed with any other system maintenance functions until you resolve all validation errors.

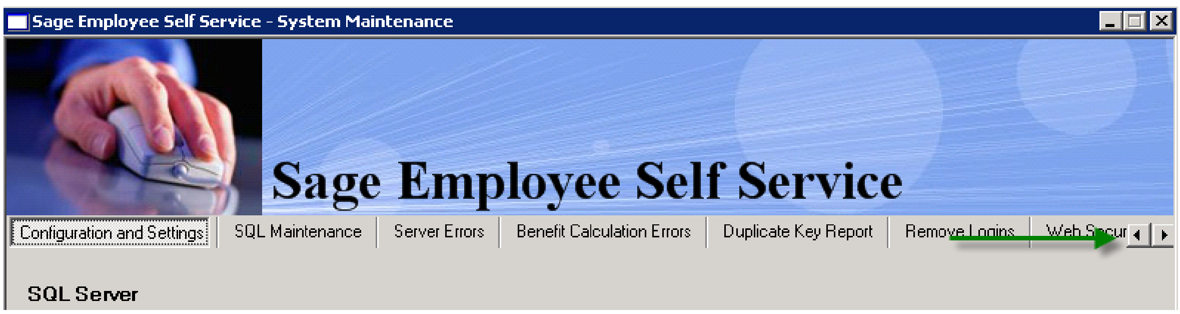
SQL Server

If you are using SQL Server Express Edition as your Sage Employee Self Service database, do not change any of the information in the SQL Server section.

- **Server Name:** Name of the SQL server where the Sage Employee Self Service database is located.
- **Database Name:** Name of the Sage Employee Self Service database. If you change the name of the database, enter the new name here. For example, you might have restored a backed up database and renamed it.
- **User Name and Password:** A valid SQL server user name and password is required to access the SQL server (this is the user name and password defined on page 12).The user account must have dbo (database owner) permissions to access the database on the SQL server.

Keys

Use the arrows on the right side of the tab bar to navigate to the **Keys** tab.



- **Generate Keys:** This button provides you with the ability to generate keys (secure codes to link systems) for single sign-on service for your employees, exclusively for use with Sage Source.

Email

- **Enabled:** This option is selected after installing Sage Employee Self Service. Leave **Enabled** selected if you want Sage Employee Self Service users to receive an email whenever a notification is sent to the Message Center. If the customer does not need email or does not have the SMTP service configured yet, clear the check box.
- **SMTP Server:** Email server used by Sage Employee Self Service. SMTP should always be installed on the local server and be configured to forward email. The SMTP server name must always remain localhost or <Local Server Name> unless directed by Sage HRMS Customer Support.

Sage HRMS

This indicates the Sage HRMS database type to which you are connecting. Select **SQL Server** to display the following:

- **Server Name:** Name of the SQL server where the Sage HRMS database is located.
- **Database Name:** Name of the Sage HRMS database. If you change the name of the database, enter the new name here. For example, you might have restored a backed up database and renamed it.

- **User Name and Password**: A valid SQL server user name and password is required to access the Sage HRMS database. The SQL Server logon must have dbo (database owner) permissions.

Sage Employee Self Service

- **Locked:** Select this check box to lock Sage Employee Self Service, which will log off any employee currently logged on and prevent other employees from logging on. This allows you to perform tasks such as backing up and restoring the Sage Employee Self Service database.

Warning: If anyone using Sage Employee Self Service makes changes between the time the Sage HRMS and Sage ESS databases are backed up and the time the databases are restored, all changes are lost (including notifications, employee requests, and pending changes) when you restore the database (because the data was not yet posted to Sage HRMS). This means that anyone who made a change must re-enter his or her changes. To avoid this situation, lock the Sage ESS database before you do a backup and then unlock it only when you are sure you do not have to restore the database.

- **Session Timeout:** Duration of inactivity (in minutes) before someone is automatically logged off from Sage Employee Self Service. Enter a value between **0** and **999**.
- **Serial Number and Installation Code:** Information used to determine the employee license count and which Sage Employee Self Service modules are installed and available. Customer Service provides this number. The Installed Components and User Licenses reflect the current configuration and change accordingly if you enter a new serial number and installation code to add new components or more user licenses.
- **Save:** The system validates the configuration and settings and returns a message if there are invalid entries.
- **Reset:** Returns all fields to the default values.
- **Reset Master Password:** Changes the Master Password back to the default value of master. You receive a message reminding you to change the password to something other than master the next time you log on.

SQL Maintenance

This page is used to back up or restore your Sage Employee Self Service database.

Note the following before you begin:

- In order for the Sage Employee Self Service and Sage HRMS databases to stay synchronized, whenever you back up or restore your Sage Employee Self Service database, you must also do the same operation in Sage HRMS.

Warning: If anyone using Sage Employee Self Service makes any changes between the time the Sage HRMS and Sage Employee Self Service databases are backed up and the time the databases are restored, all changes are lost (including notifications, employee requests, and pending changes) when you restore the database (because the data was not yet posted to

Sage HRMS). This means that anyone who made a change must re-enter his or her changes. To avoid this situation, lock the Sage Employee Self Service database before you do a backup and then unlock it only when you are sure you do not have to restore the database.

- The \Sage Software\Employee Self Service\CustomFiles folder on the Web server is not backed up during the backup procedure. This is the folder where custom style sheets and custom graphics are uploaded when you perform the Sage Employee Self Service Load to Server operation. If you have uploaded files, you should do a separate, manual backup of this folder whenever you back up your database.

Also, if you saved any custom files in the \Sage Software\Employee Self Service\Web folder (such as in Web\CSS or Web\Images), do a manual backup of these folders.

- **Backup File Path:** This is the location and name of your Sage Employee Self Service database backup file. Confirm that it is correct.
- **Backup:** Click **Backup** and confirm the action to start the process. An indicator shows the process as it runs and a message displays when it is finished.
- **Restore:** Click **Restore** and confirm the action to start the process. An indicator shows the process as it runs and a message displays when it is finished.

Note: If you restore a database that was backed up in a previous version of Sage Employee Self Service, the system automatically upgrades the database to the latest installed version during the restore process.

- **Upgrade Database:** Do not use this unless directed by Sage Customer Support.
- **Key Update:** Do not use this unless directed by Sage Customer Support.
- **Apply Fix File:** Do not use this unless directed by Sage Customer Support.

Server Errors

This page displays a message for each critical Sage Employee Self Service error. The messages contain the following information:

- The error message
- The user that caused the error
- Client information
- Server information
- Complete stack trace and SQL if applicable

To read a message, highlight the error in the top section and highlight an item in the middle section. The information displays in the bottom section. Be prepared to send this to Sage Customer Support if you are working with them to troubleshoot an issue.

After you select a SQL error on the **Server Errors** tab, you can view a description of the error. You can also select any of the following items for additional information on the error:

- Environment
- Message
- Source
- Stacktrace
- Targetsite

Because error messages written to the server's event log may contain user data, for security purposes you can use the **Abbreviate Logged SQL Errors** option. When you select the check box, the system will "crop" server error messages, abbreviating them to the first few characters. However, because this is likely to strip off information that could help determine the cause of the error, you can also clear the check box to log the full server error.

You can also click **Open File** and navigate to the error log on the server (**\Sage Software\Employee Self Service\Log**) to open the error file. Note that when a server error occurs in Sage Employee Self Service, the employee sees a high level description of the error and has the ability to send the error to the technical administrator.

Benefit Calculation Errors

The system keeps a daily log of all benefit calculation errors and provides the ability to access the log files on this page. You can click a file to see the expressions that caused the calculation error. However, this information does not provide the location in Sage HRMS where the errors occur.

The error log is also available on the server at **\Sage Software\Sage Employee Self Service\Log**.

Duplicate Key Report

Use this page to run a report to display all Sage HRMS records that have identical keys. When someone working in Sage Employee Self Service attempts to open a page with records that contain duplicate keys, the system generates the message "No records could be displayed. Contact your Human Resources department for assistance." For the reason, you should run this report and delete all duplicate records before allowing anyone to log on to Sage Employee Self Service for the first time.

Tip: You should run this report every couple of months at a time when the Sage HRMS database is not heavily used.

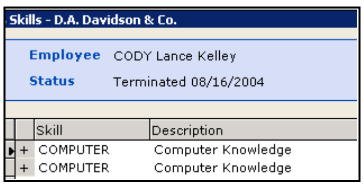
The duplicate key report examines Sage HRMS tables used by Sage Employee Self Service and displays each table where duplicate keys are found, a list of the columns that make up the key (the combination of all data in these columns should be unique), and a list of column value combinations (keys) that have multiple matching records in the table. Refer to page **Error! Bookmark not defined.** for a list of the keys in Sage HRMS tables used by Sage Employee Self Service.

The following figure shows that the Terminated Employee Personnel table has duplicate records and requires maintenance.

You can resolve these conflicts through the Sage HRMS client by changing information in fields for the records listed or you can correct duplicate records directly in the SQL tables.

Note: If you do not have access to Microsoft SQL Server or do not have experience in modifying tables, contact Sage Customer Support for assistance.

For tables that contain records that are connected to individual employees, an additional column with the employee name is shown in the duplicate record listing. For example, the preceding figure shows that empno 3055 has a duplicate record. The following Skills page for empno 3055 in the Sage HRMS client shows two COMPUTER skill codes. To fix the duplicate record for this employee, delete one of the records.



To save or print the report as an .RTF file, click **Export.**

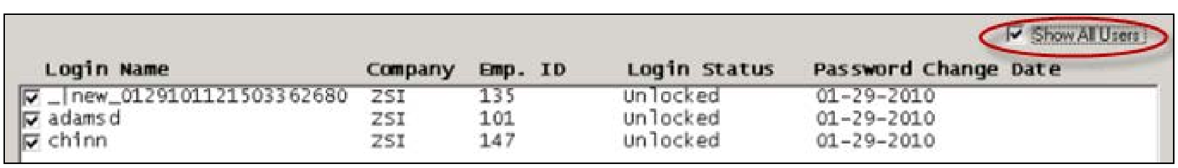
Remove Logins

This page displays logins that are no longer associated with Sage HRMS employees. Select a **Login Name** and click **Remove Logins** to remove it from the Sage Employee Self Service Users database (tUSERS). An employee user license becomes available for each invalid login name that is removed.

Note: If a login is assigned as a hiring manager or supervisor for a requisition in Sage eRecruiter, you must remove the login from the requisition in order to delete it from the ESS Users database.

You can also use this page to see all users (with valid or invalid logons) in the Sage HRMS Employee database. Follow the steps below.

1. Double-click the image in the upper left corner of the window to reveal the **Show All Users** check box.



19. Select the **Show All Users** check box to display all employees.

20. With all employees displayed, you can proceed to select and remove all employees from the Sage Employee Self Service Users database (tUSERS). This function is useful if you are moving customer data from a test environment to a live environment.

> **Warning:** Selecting **Show All Users** and clicking **Remove Logons** irrevocably deletes all employee, manager, and administrator data in Sage Employee Self Service, including notifications, pending benefit elections, and time-off requests. You should never remove logons without first creating a backup of your Sage Employee Self Service database.

Web Security

This page is used to configure the URLs and Client IP addresses that can create a session using the internal and external entry points to Sage Employee Self Service. Use this page to restrict internal and external users' access to your Sage Employee Self Service system. (See below for Recommended Setup.)

1. From the **Start Page** drop-down list, select the page that should open when the user logs on:

    - **Employee / Administrator** - Select this to open the internal start page (the ESS Logon page).

    - **View Consumer** – If you are using the Dynamic Information Sharing capability, select this to open a page created with View Builder.

2. In the http(s)// field, enter the server/DNS name of all servers you want to allow when requesting the selected start page. Click **Add** to add the name to the list (if the list is empty, there are no restrictions). Note that the following characters are not permitted as part of a server name:

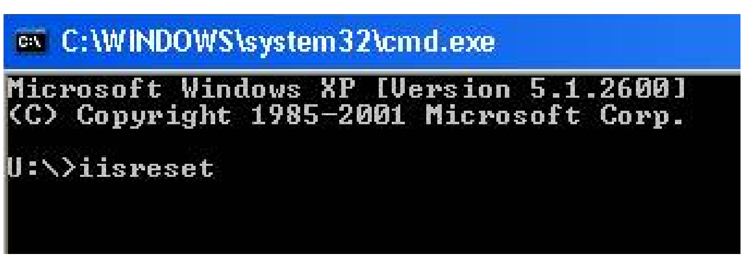
    `~!@#$%^&()=|\{}[];\'"<>,/

3. In the **IP** field, enter four sets of numbers that make up a Client IP address. Click **Add** to add the number as an allowable address when requesting the selected start page (if the list is empty, there are no restrictions). For each IP box, enter up to three characters. Note that only the following characters are allowed:

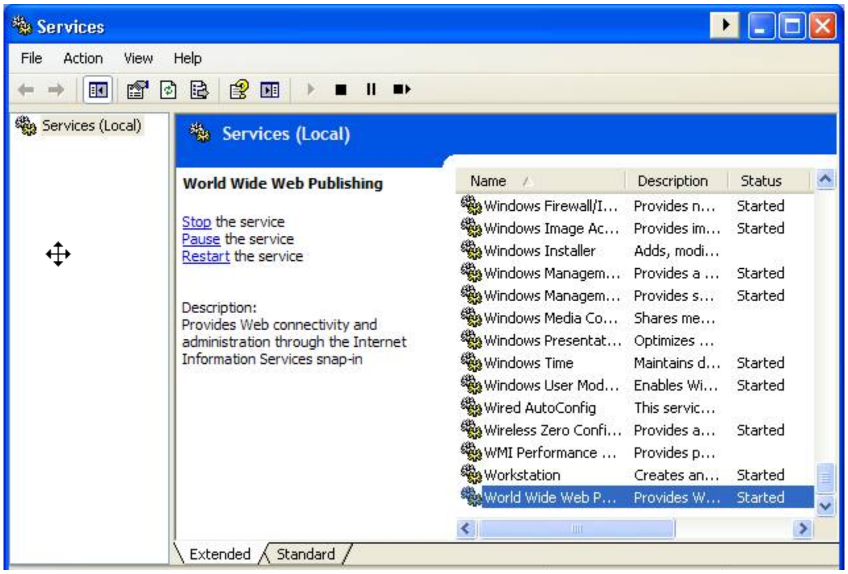
    1 2 3 4 5 6 7 8 9 0 * ?

4. Restart IIS. This is required whenever you make a change to Web Security. Follow the steps below to restart IIS.

    a. From an MS-DOS prompt, type **iisreset** and press **Enter**.



b. When the Services page opens, right-click **World Wide Web Publishing Service** and select **Restart**.



Recommended Setup

Limit the **Employee / Administrator** page (internal entry point) to a **DNS** or **wins** name of the server that is designated for Sage Employee Self Service / internal use. Optionally, if employee access over the Internet is not desired, limit the **Client IP** addresses to only those that match the company **Intranet**.

The **External Applicant** page (external entry point) can optionally be restricted to the **DNS** name of the server that is used for eRecruiter applicant access.

Limit the **View Consumer** page (internal entry point) to a **DNS** or **wins** name of the server that is designated for Sage Employee Self Service / internal use. Optionally, if View access over the Internet is not desired (that is, you will only be distributing View output as Microsoft Excel Web Query (*.iqy) files), limit the **Client IP** addresses to only those that match the company Intranet.

Scheduled Backup and Restore

InstallHelper.exe is a command line tool that is used to create scheduled backups of your Sage Employee Self Service data for both SQL Server and SQL Server 2005 Express Edition. It is located in the \Bin folder on the Sage Employee Self Service server (**\Sage Software\Employee Self Service\Web\Bin**).

This tool performs a backup or restore of Sage Employee Self Service data, along with error handling, logging, and automatic "remapping" of the database media paths when databases are restored to a different database or server.

To create a scheduled backup, use the **at** command. Refer to Microsoft Knowledge Base Article "How To Use the AT Command to Schedule Tasks" at:

http://support.microsoft.com/default.aspx?scid=kb;en-us;Q313565

The command line parameters relevant for a backup or restore are:

- /backup="<SQLBackupFileAndPath>"
- This creates a backup of the currently configured Sage Employee Self Service database in the specified file.
- /restore="<SQLBackupFileAndPath>"

This restores the specified file to the currently configured Sage Employee Self Service database. In both cases, the file and path supplied are on the SQL Server or SQL Server 2005 Express Edition.

Setting Up Sage Employee Self Service

This section guides you through the setup tasks necessary for Sage HRMS and Sage Employee Self Service. The extent of your setup depends on the modules you are using in Sage HRMS, the modules you installed for Sage Employee Self Service (Sage ESS, Benefits Enrollment, and Sage eRecruiter), and the way in which you are going to use these modules. Review each step in its entirety to determine if it applies to your usage requirements.

When you finish these steps, employees and administrators can create their logons and use Sage Employee Self Service for employee self-service and recruiting. When the employer is ready to set up Sage Employee Self Service for benefits enrollment or life events, refer to the Sage Employee Self Service *Benefits Planning Guide*.

Setting Up Sage HRMS for Sage ESS

Use the following instructions to prepare Sage HRMS for integration with Sage ESS.

Assigning Secondary Supervisors

In Sage HRMS, complete this step if you want to use the Supervisor role in Sage Employee Self Service.

When a secondary supervisor is assigned for an employee, he is considered the employee's Supervisor in Sage Employee Self Service. Thus, Sage Employee Self Service allows for a Manager and a Supervisor.

The person assigned as an employee's secondary supervisor in Sage HRMS (**Secondary Supervisor** field on the Current Job page) is used in Sage Employee Self Service as the person who is responsible for the day-to-day tasks performed by an individual employee. While they lack the level of authority of a manager, they have an oversight responsibility for the employees with whom they work. A supervisor might be responsible for tracking and approving employee time off requests.

If you want to use the Supervisor role in Sage Employee Self Service (commonly used for approving employees' time off requests), you must fill in this field for each employee in each employer in which you want to use the role.

1. In Sage HRMS from the Navigation Pane, select **Employees > View/Edit Employee** and select an employee. Then, click the **Job and Pay** tab and the **Current Job** icon. Click the **Organization** tab.
2. Click the **Find** button in the **Secondary Supervisor** field and select the employee to assign as the employee's secondary supervisor.

3. Repeat step 2 for all employees who should have secondary supervisors assigned to them.

4. Save your changes.

Updating Email Addresses

In Sage HRMS, do this step if you want Sage Employee Self Service to send emails to employees, managers, supervisors, administrators, recruiters, and hiring managers to notify them of actions taken.

Employee Self Service can send emails and post notifications when an action (such as request for approval, benefit update, time off request, interview invitation) has been taken. If you set up the system to send emails, you should verify that email addresses have been entered for your Sage HRMS employees. You can use the Update Email Addresses process to verify that all your employees have email addresses.

For detailed instructions:

1. In Sage HRMS from the Navigation Pane, select **Employees > Update Email Addresses**.

2. Click to open context-sensitive Help and follow the instructions. When the process is complete, all employees have email addresses as defined by the process.

Reviewing Attendance Plan Setup

In Sage HRMS, do this step if you want employees to be able to submit time off requests.

Sage Employee Self Service lets employees submit time off requests, which are approved and then transmitted to the employee's Sage HRMS attendance plans. In order for the Time Off Request function to work correctly and without errors, you must verify that each attendance plan has been set up with unique absence reason codes. That is, you cannot have more than one plan with the same absence reason codes.

Preparing Data to Use in Sage eRecruiter

If you use Sage eRecruiter, you must make sure the company data in Sage HRMS is updated appropriately for use with the recruiter module in Sage Employee Self Service. Please complete the following tasks in Sage HRMS before you start using Sage eRecruiter. Otherwise, skip this section.

Assigning Hiring Managers

Employees assigned as hiring managers are involved in the hiring process in Sage eRecruiter. This includes creating job requisitions, reviewing resumes, interviewing applicants, and approving applicants for hire.

There are several types of individuals who use Sage eRecruiter. They are recruiters, applicants (both internal to the company and external from outside the company), hiring managers, and hiring assistants. You assign hiring managers within Sage HRMS, and recruiters and hiring assistants within eRecruiter. You do not need to assign applicants, because anyone who logs on to eRecruiter can be an applicant.

1. In Sage HRMS from the Navigation Pane, select **Employees > View/Edit Employee** and select an employee. Then, click the **Job and Pay** tab and the **Current Job** icon. Click the **Organization** tab.

2. Select the **Hiring Manager** check box to assign the selected employee to the role of hiring manager. As a default, the system assigns the hiring manager role to any employee who is a supervisor.

3. Repeat steps 1 and 2 for all employees who should be hiring managers for eRecruiter.

4. Save your changes.

Reviewing and Updating Job-Related Information

Job-related information is used when setting up a job code.

1. In Sage HRMS from the Navigation Pane, select **Setup > Employees > Jobs**.

2. Review each of the following job-related code tables and edit as necessary.

- Direct/Indirect codes
- EEO Job Groups (US only)
- Job Classification codes (Canada only)
- Job Family codes
- Job Status codes
- Pay Equity Job Group codes
- Salary Grades
- Step rates

3. Save your changes.

Reviewing and Updating Job Codes

Each requisition you create in eRecruiter refers to a specific job for which applicants can apply. Before you can attach a job to a requisition, you must make sure that the information about the job is correct. After you have reviewed and updated the job-related information (in the previous step), you are ready to review and update job codes.

1. In Sage HRMS from the Navigation Pane, select **Setup > Employees > Job Codes**.

2. Review job code information on the following tabs and then add and edit as necessary. Click ? for information on each field on the Job Code page.

a. **Definition** tab

b. **Salary** tab

c. **Description** tab (verify the description is complete and up to date, as it is used when jobs are posted in eRecruiter)

3. Save your changes.

Preparing Code Tables for Import

Sage eRecruiter uses some of the same code tables as those in Sage HRMS. When you start using Sage eRecruiter, you will be able to import these code tables into Sage eRecruiter so you do not have to re-enter the information.

1. In Sage HRMS from the Navigation Pane, select **Setup > Employees** and select the code table.
2. Review and update as necessary the data in the following code tables so they will be ready to import into Sage eRecruiter. Note that most of them have default data in them such as Ethnic ID Codes, while others are user-defined such as Skill Codes. Click for information on each table and make the necessary changes.

- Aboriginal Codes (Canada only)
- Census Metro Area Codes (Canada only)
- Disability Codes (Canada only)
- Ethnic ID Codes (US only)
- Industrial Sector Codes (Canada only)
- Shift Differential Codes
- Skill Codes
- Visible Minority Codes (Canada only)

3. Save your changes.

Setting Up Sage Employee Self Service

Use the following instructions to set up Sage Employee Self Service

Setting Up Pages

Each Sage Employee Self Service page available to the employee and manager can be tailored to meet the needs of each employer or for the entire enterprise. When you define page settings, you build the automated process that passes information and tasks from one person to another for some kind of action. These actions can be the ability to view a page, change, or add data on a page, receive a notification of a change or addition, and approve or reject a change or addition.

Before you set up pages, you must determine whether you want the settings to apply to a specific employer or to the entire enterprise such as all employers in your system. Page settings for a specific employer only apply to that employer; page settings for the enterprise apply to all employers in your Sage Employee Self Service system.

For each employer (or the entire Enterprise), you can set the following for each page:

- **Access type:** Determines whether the page can be updated, whether updates need approval and whether notifications need to be sent to specific administrators.
- **Approval role:** If updates to the page need approval, this is the role that must approve the updates. The person assigned to the approval role must approve the updates before the data is saved to Sage HRMS.
- **Notify role:** When employees update the page, this is the role notified of the update. You can select up to two notify roles.
- **Custom Content**: On each page, you can add additional custom content. This includes web links (navigation to a specific website from the page), file links (navigation to specific documents from the page), a View URL (created using the View Builder), and custom text (user-defined text to communicate page-specific information to the employee).

For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **System Settings > Employer Setup** and click the **Page Setup** tab.
3. Click and follow the instructions for Page Setup.

Defining Display, Message Center, and Email Settings

In Sage Employee Self Service, perform this step to set up message center and email information, as well as how various fields are displayed to the user.

Use the **Settings** tab on the Employer Setup page to set up reminders that are posted to the Message Center when an employee’s birthday, performance review or employment anniversary is upcoming. Also, define settings for displaying the **Smoker** field, Employer Benefits Contribution information, Salary Grades, and Step Rates.

You can set this information for a specific employer or for the Enterprise. For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **System Settings > Employer Setup** and click the **Settings** tab.
3. Click and follow the instructions for **Settings.**

Defining Custom Content

In Sage Employee Self Service, perform this step to add custom content to pages. For example, you might want to add a hyperlink on a Benefit page that will take the user to a Benefits Guide document. You can add text references, file links, a View URL (created using the View Builder), and web links.

You can set this information for a specific employer or for the Enterprise. For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).

2. From the Administrator menu, select **System Settings > Employer Setup** and click the **Custom Content** tab.

3. Click and follow the instructions for **Custom Content.**

Defining Global Approvers and Global Application Questions

In Sage Employee Self Service, perform this step if you are using Sage eRecruiter. This page enables you to set up either a recruiter or a hiring manager as a person who must approve all requisitions. You can also define applicant questions that you want to appear on all job applications.

You can set this information for a specific employer or for the Enterprise. For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).

2. From the Administrator menu, select **System Settings > Employer Setup** and click the **eRecruiter** tab.

3. Click and follow the instructions for **eRecruiter**.

Assigning Roles

In Sage Employee Self Service, perform this step to assign roles to employees. Each individual using Sage Employee Self Service has one or more roles that define their access rights, approval authority and notification settings.

Administrator Roles

Unlike employees who use the system for normal self-service functionality, individuals who perform administration for an employer's human resources, training, or benefits departments need additional rights and authority to perform their duties in Sage Employee Self Service.

Each administrator role enables an HR, Benefit, or Training Administrator to act on approval requests and receive notifications. When you assign these administrator roles, you assign employees to administrator roles as well as determine the employers for which the administrator has authority to approve requests and receive notifications.

Benefit administrators can also set up benefit functionality, open enrollment, and life events. For example, a benefit administrator can determine the parameters for an open enrollment period, including the length of the open enrollment period and in which benefit plans the employee can enroll.

Recruiter Roles

If you are using Sage eRecruiter, you must also assign employees to the Recruiter role. Recruiters perform all recruiting functions, such as creating job requisitions, tracking applicants, posting jobs, writing letters, acknowledging receipt of resumes, scheduling interviews, and sending job offers.

View Builder Roles

View Builder is a Sage Employee Self Service feature that allows an employee to create a View (similar to a template) that generates data output. This allows employees who are regular Sage ESS users (such as Human Resources Generalists) to share data with employees who may not use Sage ESS (such as upper-management). After creating a View, it can be distributed as a URL link in an email message or saved as a Microsoft Excel Web Query file (***.iqy**).

Sage Employee Self Service includes two system-defined roles for View Builder users:

- **View Creator** - You must assign this role to any employee you want to have access to the View Builder. When you assign an employee the View Creator role, the employee will be able to view all data in all employers you assign them to. In addition to the **View Builder** menu item, the employee will have access to the **System Settings > Employer Setup**, **Create Custom Menu**, **User-defined Fields**, **Custom Content > Create Web Links** and **Create File Links on the System Administration** menus when you assign this role.
- **Executive Viewer** - This role allows an employee to view all of the data in the company they are assigned to. To create a View for an employee assigned this role, select Executive Viewer in the **Access Level** field on the Format View page of the View Builder page.

You can also create a custom View Builder role. This is available for companies who may need to have more levels of access to views for various sets of employees. From the Administrator menu, select **Roles and Logon > View Builder Roles** to create custom roles.

For detailed instructions on assigning admin and view builder roles:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **Roles and Logon > Assign Admin Roles**, click and follow the instructions.

Setting Up Logon Parameters

In Sage Employee Self Service, perform this step to define the rules by which employees are permitted to log on.

When an employee attempts to create a new logon, they are required to enter the information you select in this step.

Your selections must ensure that the information the employee enters is unique. You must select at least one initial logon field, but to uniquely identify employees, you might need to select more than one field. For example, if a company has more than one Robert Smith, you would need to require more than just first and last name for the employee to create a logon. In this case, you could require first name, last name, and social security number.

Note: The Social Security Number (or Social Insurance Number) does not display when entered on the Create New Logon page or the Change or Reset Password page. Instead, it is masked the same as a password.

These rules apply to all employees in all employers in your system and include:

- Information an employee must provide to set up a logon and access the system
- What types of employees (status) are permitted to log on
- Employee logon history
- Password properties, for example, length or expiration
- When an employee can be locked out
- Security questions to ensure the employee provides the correct answer for a password change or reset

For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **Roles and Logon > Logon Setup**, click and follow the instructions.

Setting Up Applicant Logon Parameters

If you are using Sage eRecruiter, you must set up separate logon parameters for external applicants who log on to Sage eRecruiter from outside the Sage HRMS system. The password is the entry point to Sage eRecruiter for applicants who access the system from a company's job listing web page or from a job board's web pages.

For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **Roles and Logon > Applicant Logon**, click and follow the instructions.

Defining System Settings

In Sage Employee Self Service, perform this step to define settings for all employers.

The System Setup page is used to establish various parameters for your Sage Employee Self Service system. When you define settings on this page, they are defined for all Sage HRMS employers (similar to Enterprise Setup in Sage HRMS). The following parameters can be set on this page:

- **Archive Messages:** Determines whether or not approved requests are archived.

- **Display All Training Courses:** Determines if all courses or only the employee's required courses are available to the employee to enroll in.
- **View Indirect Reports:** Determines whether managers can see information for their indirect reports.
- **Search Phone List By:** Sets the organization level by which an employee can search through the employee phone list.
- **Display Pay History Before Pay Day:** Indicates if your employees can view their pay history data before their pay day.
- **Display Pay History From:** This date determines how much pay history information (hours, gross pay, deductions, taxes, and net pay) is shown on the employee's Pay History page.
- **Display Employment History From:** Determines how much compensation, job, and performance history information is shown to the employee.
- **Retain Audit Trail From:** Determines how many audit trail history records should be kept in the system.
- **Technical Admin Email Address:** Specifies to whom unexpected error messages are sent.
- **System Emails Sent From:** Enter the email address in your company that you want to display in the **From** field of system generated email messages. The system does not verify that the email address is valid. ESS uses this email address for various purposes. For example, ESS populates the **From** field of the email message with this address if it cannot validate an address to be used as the From email address.

  SMTP (Simple Mail Transfer Protocol) must be set up and configured in order to send emails.
- **Display Available Fields:** Select how you want fields to display in the **Available Fields** list on the Select Data page of the View Builder:
  - **Grouped** - To display the list of fields in related groups. For example, job and pay-related fields such as Unit Pay Rate, Hours/Units, and Annual Pay display under the Job and Pay group. This allows you to expand a group to make individual selections or select a group to automatically select all fields in the group.

    or
  - **Alphabetically** - To display the list of fields in alphabetical order without groups.
- **View Server Application URL:** If the View Builder and the View Consumer access the system by different URLs, you can specify which URL will be used for the View Builder's Copy To Clipboard function. If you leave this field blank, the View Builder will use the same URL that is being used for the ESS application. If you want a different URL to be used, enter it here. This same View Server Application URL setting will be used for the Generate IQY File check box.

- **Remove Applicant Records After:** If you are using Sage eRecruiter, specifies the length of time to retain applicant records.

- **Enable Requisition ID Override:** If you are using Sage eRecruiter, permits the user to create a requisition ID number manually.
- **Enable Resume Search For:** If you are using Sage eRecruiter, determines whether recruiters and/or hiring managers can perform full-text searching through applicant resumes while using the Candidate Search function in Sage eRecruiter.

  Note: The Resume Search function is based on an open standard that requires the appropriate IFilter plug-in to be installed for each type of file that is to be searched (such as doc, txt, rtf).

  In most cases, the appropriate IFilter is already installed. When Sage eRecruiter is installed, the following file types are installed by default: documents created with Microsoft Office applications (such as, rich text, Word, PowerPoint, Visio, Excel, Publisher), email messages (MIME), HTML, plain text, Null IFilter (file meta-data only), MAPI protocol handler, and Outlook Express protocol handler. However, because there are hundreds of filters created by different vendors for various file types to support the open standard, you are responsible for ensuring that the right filter is installed for each resume file type the company accepts from applicants.

- **External recruiting website URL**: If you are using Sage eRecruiter, persons from outside the company use this URL address to enter Sage eRecruiter. It is the URL for the company's recruiting web page that may or may not be implemented as part of Sage eRecruiter.

  If the company has implemented an external website, this address will be included in messages to external applicants. You must enter a valid protocol, domain, and page reference for the external page.

For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **System Settings > System Setup** to open the page. Click and follow the instructions.

Defining Time Off

In Sage Employee Self Service, perform this step to define how employee time off functions.

The Time Off Setup page is used to define the way in which employee time off functions for each of your Sage HRMS employers. For example, you can choose whether the system sends a notification when an employee deletes a request or define a specific number of hours an employee is allowed to exceed their available balance. You must define Time Off settings for each employer in your system.

For detailed instructions:

1. In Sage Employee Self Service, log on as the Master User (user name **master**, password **master**).
2. From the Administrator menu, select **System Settings > Time Off Setup**, click and follow the instructions.

Customizing Sage Employee Self Service (optional)

In order for employers to represent the self-service application as an internal function, Sage Employee Self Service lets you customize the user interface. The list below shows the various ways in which you can customize your system. Open the referenced Help files for detailed instructions.

Adding a Custom Message on the Logon Page

The Customize Logon Page lets you select custom features for the logon page. Prior to customizing the logon page, you must create and upload any stylesheets or graphics to be used on the logon page.

Search for **customize logon page** in Help for instructions.

Adding a Company Logo and Name

The Customize Employer page lets you select custom stylesheets and graphics for each employer in Sage Employee Self Service. This enables you to display a company logo and name prominently on all screens and change graphics and color schemes to be consistent with a company's branding.

Prior to customizing the styles and graphics for an employer, you must create and upload any stylesheets or graphics to be used for the employer.

Search for **customize employer** in Help for instructions.

Adding Links to External Intranet or Internet Sites

The Create Web Links page lets you create a link to a web page to help employees as they use Sage Employee Self Service. For example, you might want them to be able to view your company's intranet access a View URL (created using the View Builder).

Search for **create web links** in Help for instructions.

Posting Company Documents

The Create File Links page lets you create a link to a document (such as a company directory, handbook, or organization chart) to help employees as they use Sage Employee Self Service. For example, you might want to give them the ability to view or print your company's handbook.

Search for **create file links** in Help for instructions.

Adding a New Menu Item

The Create Custom Menu page lets you add new menu items to the existing menu for Sage Employee Self Service. For example, if your company has a Company Handbook, you can give your employees quick access to it by adding a menu item to the Employee menu.

Search for **create custom menu** in Help for instructions.

Adding Text to Pages

The Create Text References page lets you enter and format text you might want to add to a page to give employees more information about how to use the page. For example, you might want to give employees more information about the benefits listed on their Current Benefit page.

Search for **create text references** in Help for instructions.

Displaying User-Defined Fields

You can select up to eight user-defined fields from Sage HR and Sage HRMS Payroll to add to the Personal Profile page.

Search for **user-defined fields** in Help for instructions.

Sage HRMS Tables and Keys used by Sage Employee Self Service

This is a list of all the Sage HRMS tables that are used by Sage Employee Self Service. The values in each of these key columns must be unique. For information on running a Duplicate Key report, see "Duplicate Key Report" (page 17).

When importing data from a third-party system to Sage HRMS, these key columns must be populated and no two records in these tables should have identical values. If there are any duplicate records, they must be removed so that Sage Employee Self Service can correctly read the data

Table		Key Columns
Attendance Benefit Plan Definition	HATPLAN	P_COMPANY - Company Code P_ID - Plan ID P_RULE - Rule Record
Employee Attendance Summary	HATSUM	T_COMPANY - Company Code T_EMPNO - Employee ID T_ID - Plan ID Code
Benefit Rate Setup	HBEDEF	D_COMPANY - Company Code D_ID - Rate Table Code D_RULE - Rule Record
Beneficiary Enrollments	HBENBEN	B_BENECODE - Benefit Plan Code B_BENEID - Insurance or Savings B_COMPANY - Company Code B_DEPID - Dependent ID Number B_EMPNO - Employee ID
Employee Benefit	HBENE	B_BENECODE - Benefit Code B_BENEID - Benefit Type Code (I/S/N/V) B_COMPANY - Company Code B_EMPNO - Employee ID B_CHGEFF - Change Effective Date
Benefit Plan Table	HBEPLAN	BT_BENEID - Benefit Type Code (I/S) BT_COMPANY - Company Code CODE - Benefit Code
Benefit Rate	HBERES	R_COMPANY - Company Code R_ID - Rate Table ID R_ORDER - Order
Dependent Benefits	HDEPBEN	D_BENECODE - Benefit Plan Code D_COMPANY - Company Code D_DEPID - Dependent ID Number D_EMPNO - Employee ID
Employee Dependent	HDEPEND	D_COMPANY - Company Code D_EMPNO - Employee ID D_DEPID - Dependent ID Number

Table		Key Columns
Employee Education History	HEDU	E_COMPANY - Company Code E_EMPNO - Employee ID E_GRADYR - Year of Graduation E_MAJOR - Major for Studies
Employee Emergency Contact	HEMERG	E_COMPANY - Company Code E_EMPNO - Employee ID
Employee Event	HEVENTS	E_CODE - Event Code E_COMPANY - Company Code E_EFFDATE - Effective Date E_EMPNO - Employee ID
Employee Notes	HRENOTES	N_COMPANY - Company Code N_DCOMMENT - Employee Note Entry Date N_EMPNO - Employee ID N_TYPE - Employee Note Type Code
Employee Personnel	HRPERSNL	P_COMPANY - Company Code P_EMPNO - Employee ID
HR and Payroll Code Table	HRTABLES	CODE – Code COMPANY - Company Code FRULE - Rule indicator FTABLE - Table ID
Employee Skill	HSKILLS	S_COMPANY - Company Code S_EMPNO - Employee ID S_SKILL - Skill Code
Employee Wellness	HWELL	W_COMPANY - Company Code W_EMPNO - Employee ID
Course Catalog	NCATCOUR	COMPANY - Company Code COURSE - Course Code
Instructor Catalog	NCATINST	COMPANY - Company Code INSTRCODE - Instructor Code P_COMPANY - Employer Code of Employee Record P_EMPNO - Employee ID of Employee Record
Training Location Catalog	NCATLOCA	COMPANY - Company Code LOCATION - Location Code
Class Information	NCLAINFO	COMPANY - Company Code COURSE - Course Code STARTDATE - Date Class Begins
Employee Certifications	NEMPCERT	CERTCODE - Certification Code COMPANY - Company Code EMPNO - Employee ID
Employee Required Courses	NEMPREQU	COMPANY - Company Code COURSE - Course Code EMPNO - Employee ID
Benefit Rate Setup for Open Enrollment	OEBEDEF	D_COMPANY - Company Code D_ID - Rate Table Code D_RULE - Rule Record

Table		Key Columns
Benefit Plan Table for Open Enrollment	OEBEPLAN	BT_BENEID - Benefit Type Code (I/S) BT_COMPANY - Company Code CODE - Benefit Code
Benefit Rate for Open Enrollment	OEBERES	R_COMPANY - Company Code R_ID - Rate Table ID R_ORDER - Order
Employer Setup	SYEMPLOY	E_COMPANY - Company Code
Enterprise Setup	SYENTER	E_FEDTAXID - Federal Tax Identifier