

# Sage HRMS Q1 2023 release and Roadmap readout

March 16<sup>th</sup>, 2023

Sage



# Today's Agenda

## Recent Releases and Strategic Roadmap

Joyce Tharp

## March Release Demonstration

Mark Auchtung

## Why does the premium version of Sage HRMS matter?

Danny Martinez

## Sage HRMS Integrations

Danny Martinez

## Education and Training Update

Lynn Clee

# Our Speakers



**David Beard**  
Sage CRM  
Principal



**Joyce Tharp**  
Sage HRMS Product  
Manager



**Mark Auchtung**  
Research and  
Development  
Manager



**Danny Martinez**  
Sage HRMS Field  
Sales Engineer



**Lynn Clee**  
Senior HRMS  
Trainer

# Safe Harbor Disclaimer

Statements regarding our product development initiatives, including new products and future product upgrades, updates, or enhancements represent our current intentions but may be modified, delayed, or abandoned without prior notice and there is no assurance that such offerings, upgrades, updates, or functionality will become available unless and until they have been made generally available to our customers.

# Product name “versions”

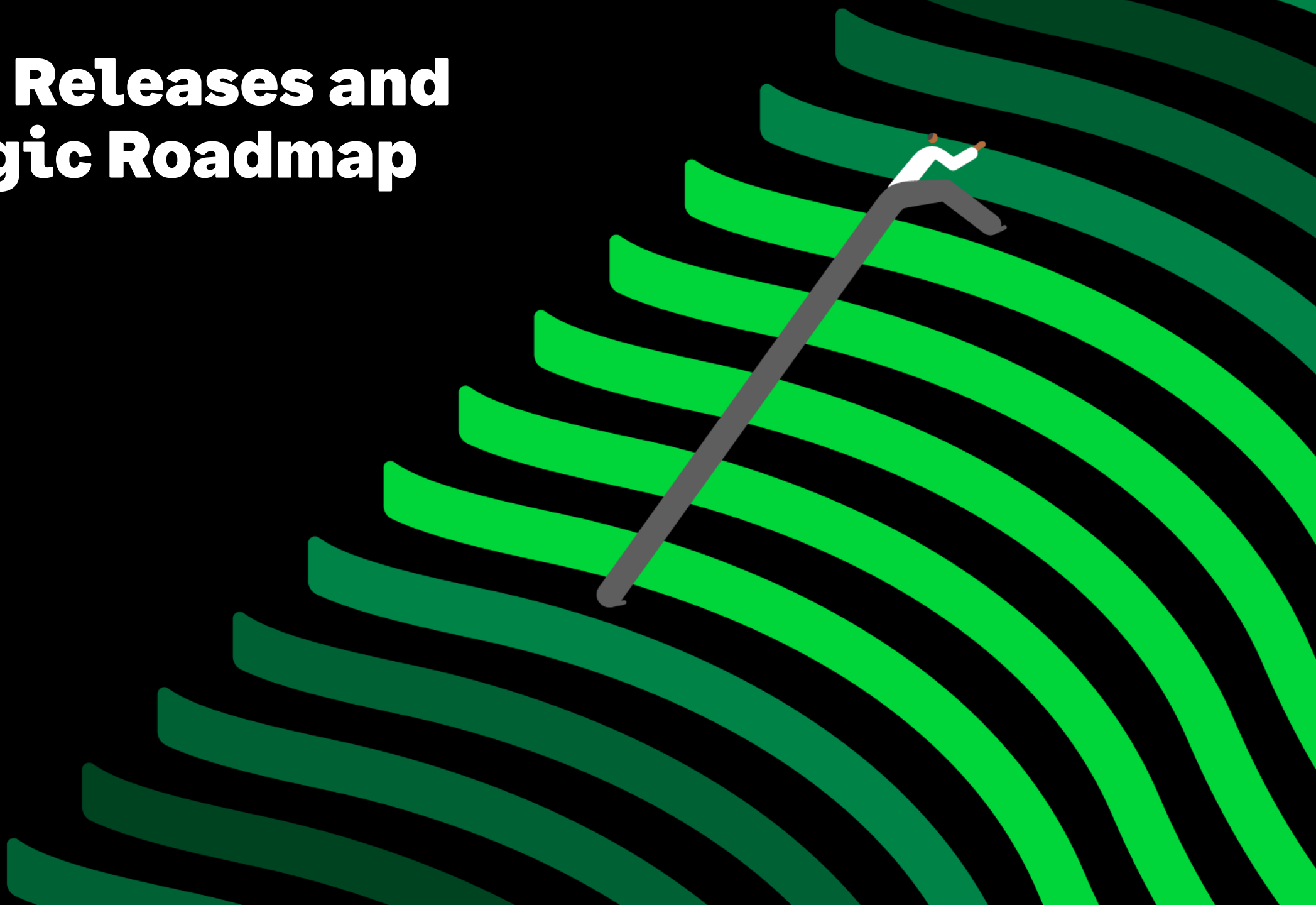
You may have heard Sage HRMS referred to as subscription, non-subscription/perpetual version. With the Q1 2022 release in March 2022, the version names of Sage HRMS have changed.

The **premium version (previously subscription)** will contain legislative updates, fixes, and new features and enhancements. Beginning with the March 30<sup>th</sup> release, we will have the premium desktop version and the premium web version.

The **existing version or non-premium (previously non-subscription or perpetual)** will only contain legislative updates and fixes. The existing/non-premium version will **not** receive features or enhancements.

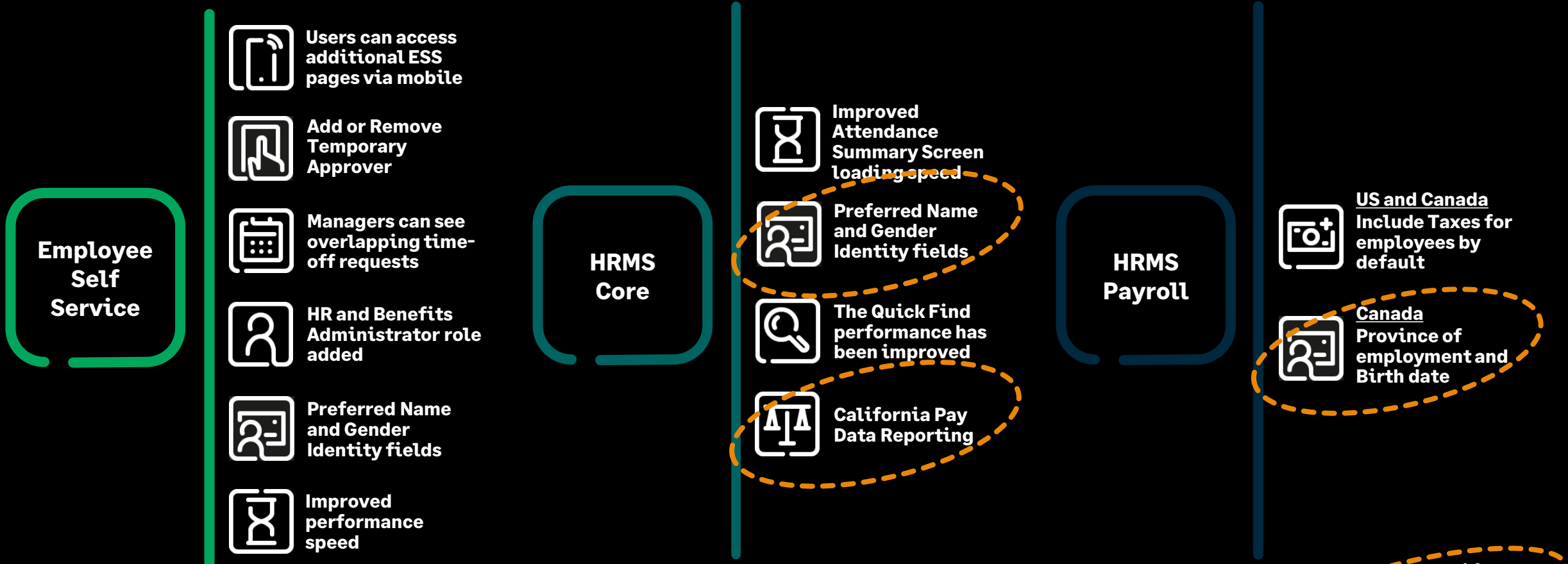


# Recent Releases and Strategic Roadmap



# Highlights | Q1 2022

## Enhancing and modernizing Employee Self Service (ESS) mobile experience



# Highlights | Q2 2022

Expanding ESS capabilities so you can access them from your mobile phone

## Employee Self Service



Email address for Multi-factor authentication



Employees can add attachments



Previous employer pages



Leave of Absence attachments



Display of information on the summary grids was expanded

## HRMS Core



Employee Insurance Benefits and Savings Benefits screens now display the Description column



Gender Identity drop-down options



The name display was expanded to include the Preferred name



Illinois Equal Pay Act Reporting

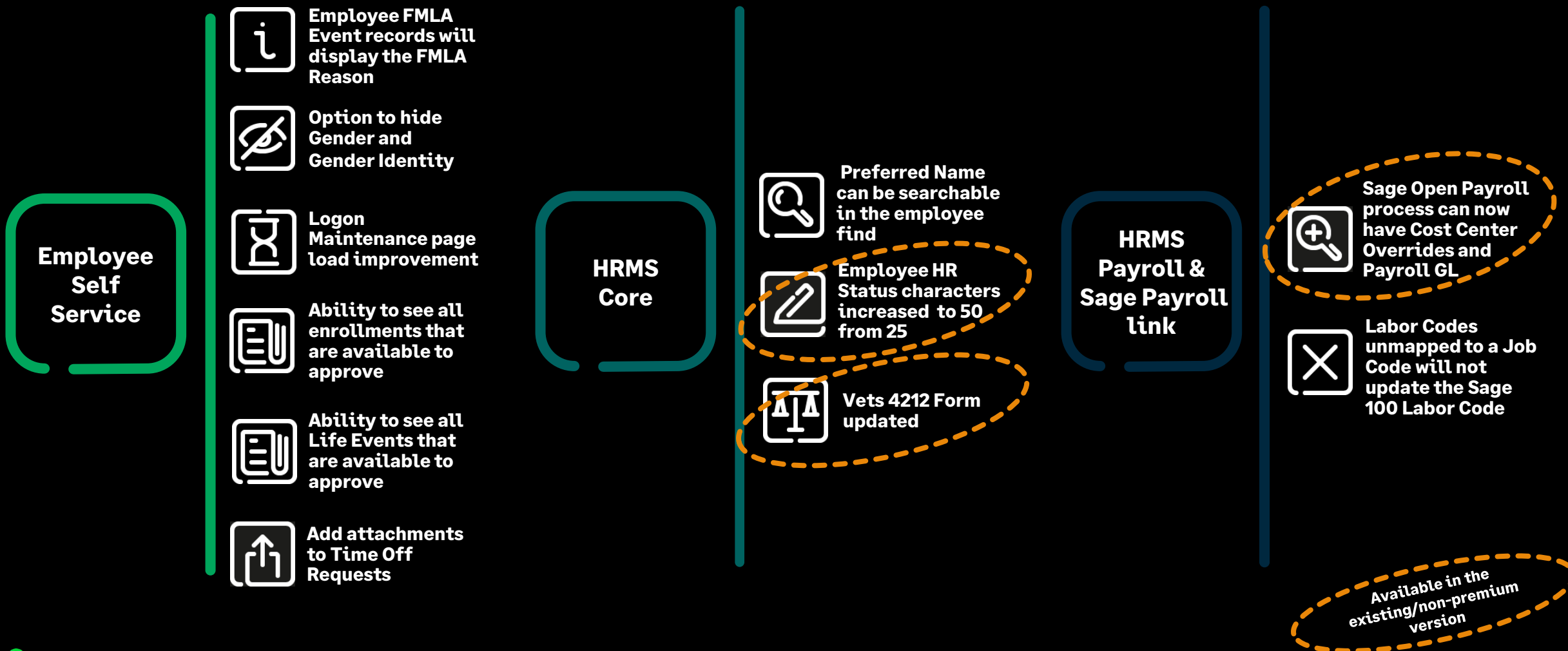
Available in the existing/non-premium version



# Highlights | Q3 and Q4 2022



Improvements that help you to increase efficiency and productivity



# 2023 | Roadmap

## focus areas

### Modernization, Simplification & Ease of Use

Continued modernization in HRMS Employee Self Service (ESS) to improve all users' experience (Administrator, Employees, and Managers) to allow them to perform tasks in less time, with less effort.

### Product Capabilities

- Compliance, technical and branding updates:
  - Sage Logo update to new Sage branding in the premium web version
- Select enhancements for:
  - HR,
  - Time Off
  - Payroll Links

### Web Application Accessibility

- Add and Maintain Employees and Time Off in the Web
- Setup and manage Benefit, OE, and Time Off plans in the Web
- Employer data and HR setup
- Payroll Web UIs, Sage 100 & Sage 300 Integrations in the web:
  - Select enhancements to Sage 100 & Sage 300 payroll links
- Training Module in the Web
- Select Standard Crystal Reports available in the web

# 2024 | Roadmap

## focus areas

### Modernization, Simplification & Ease of Use

Continued modernization in the premium web version based on our customers' feedback.

### Product Capabilities

- Compliance, technical and branding updates
- Select enhancements for:
  - HR,
  - Time Off
  - Payroll Links

### Web Application Accessibility

- Incorporate US Payroll and Canada Payroll UIs
- Enhance Database structure
- Standard Crystal Reports available in the web

### Enhance Payroll, ISVs and APIs

New APIs for integration with the HRMS/ESS web solution.

### Native Mobile App

- Mobile app for Employee Self Service (ESS)
- Mobile app available for HRMS

# 2025 | Roadmap

## focus areas

### Modernization, Simplification & Ease of Use

Continued modernization in the premium web version based on our customers' feedback.

### Product Capabilities

- Compliance, technical and branding updates
- View Builder enhancements
- Training module additional functionality
- Add payment methods for the premium version

### Web Application Accessibility

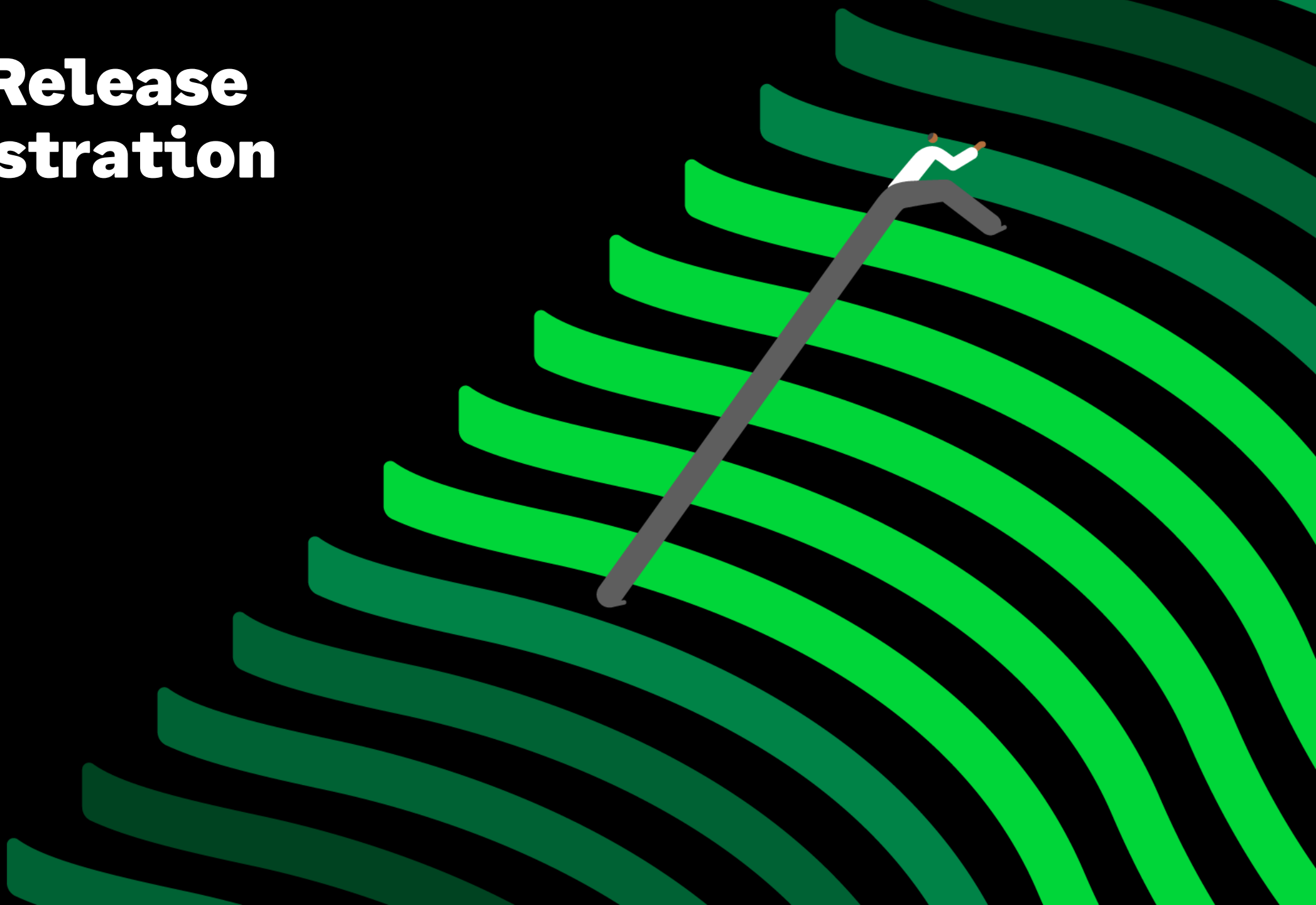
- Create a Demo or Trial environment that can be accessed by existing or potential customers
- Enhance the Dashboard in the premium web version with charts and graphs ability

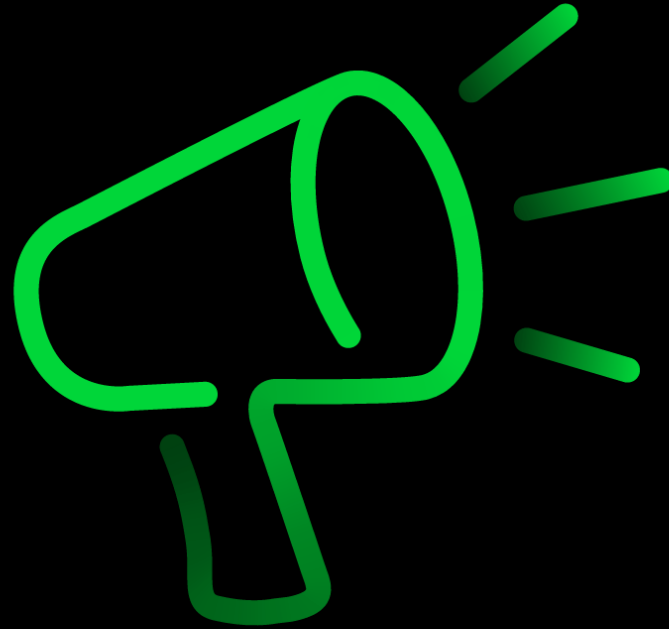
### Native Mobile App

- Mobile app Open Enrollment
- Mobile app Admin features
- Continued enhancements to mobile user experience

**This is not the end, it is just the end of the beginning!**

# March Release Demonstration





**Sage HRMS on the web is here.  
Demo time!**

# When is the release date?



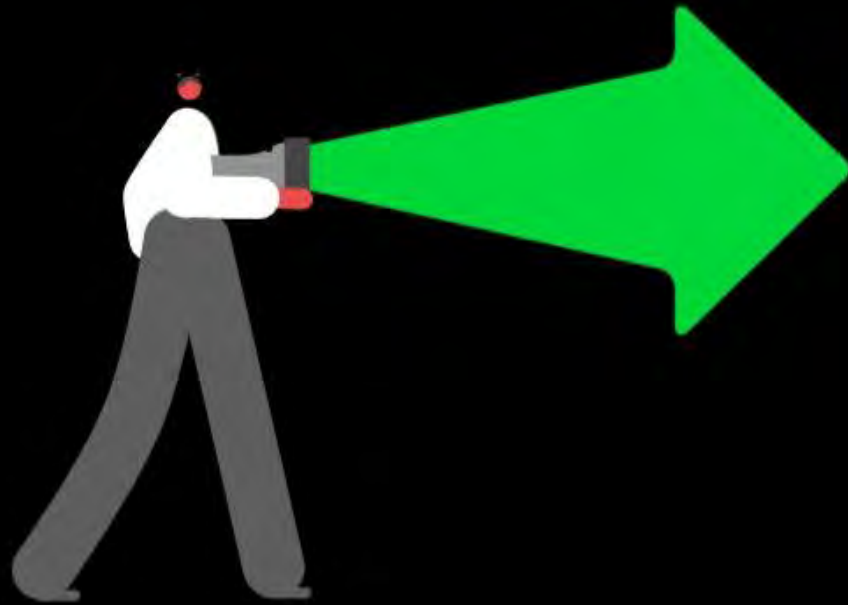
March **30<sup>th</sup>**, 2023

**Why does the  
premium version of  
Sage HRMS matter?**





# Why does the premium version of Sage HRMS matter?



Sage HRMS offers many features and enhancements that **improve your user experience**, offers **richer integration** to accounts & payroll, **meets wider compliance** needs, and improved technical underpinnings.

It matters because the **premium version of Sage HRMS** is a product that **Sage is focusing its development upon**, making investments in new functionality, enhancements, and technologies to improve its longevity and scalability.

Our heritage isn't only about software – it's about how we serve our customers. Sage customer experience starts with our **commitment to delivering personalized and professional service at every stage** – and continues as your business grows and its needs change.

# Benefits of migrating to the premium version of Sage HRMS



## Better user experience, saving time and efforts

Complete re-design of the Employee Service Portal and Benefits Enrollment experience.

Access to ESS via mobile phone, improving your workforce satisfaction and accelerating HR processes.



## Access anytime, anywhere

The upcoming March 2023 web release for the premium HRMS Core module.

Users can now access ESS and HRMS conveniently and securely over the web at any time and at any place.



## Extensive and exclusive roadmap

All future enhancements and new features will be delivered in the premium version.

Complete Sage HRMS web interface including:

- HRMS Payroll
- HRMS Training
- 100/300 Integrations

New APIs,  
Native mobile app  
Continuous modernization and enhancement of HRMS products.

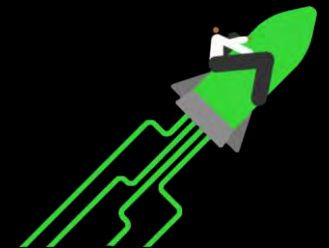


## Multi-year loyalty discount

Multi-year loyalty discount for moving to the premium version.

Current Loyalty discount along with prorated M&S credit for on-plan customers.

Tier upgrades and add-ons are more cost-effective. No more perpetual license and M&S

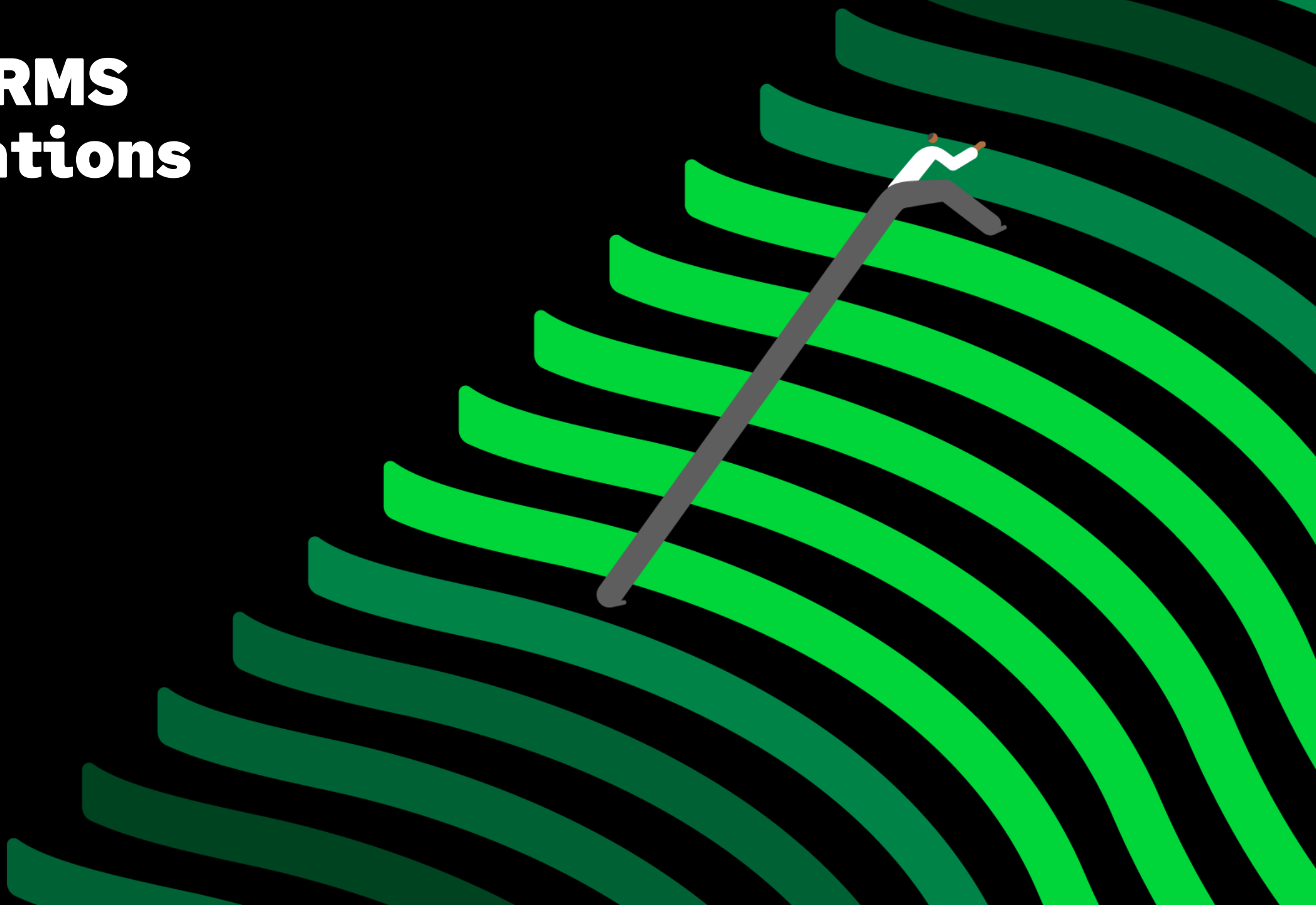


## Fast, easy migration

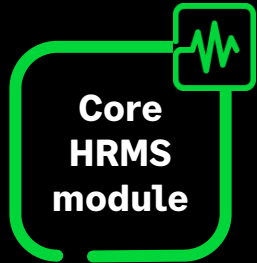
Easy transition within the HRMS interface to "Activate" subscription. Your data remains the same.

Auto-renewal with email notifications for annual subscription using form of payment on account.

# Sage HRMS Integrations



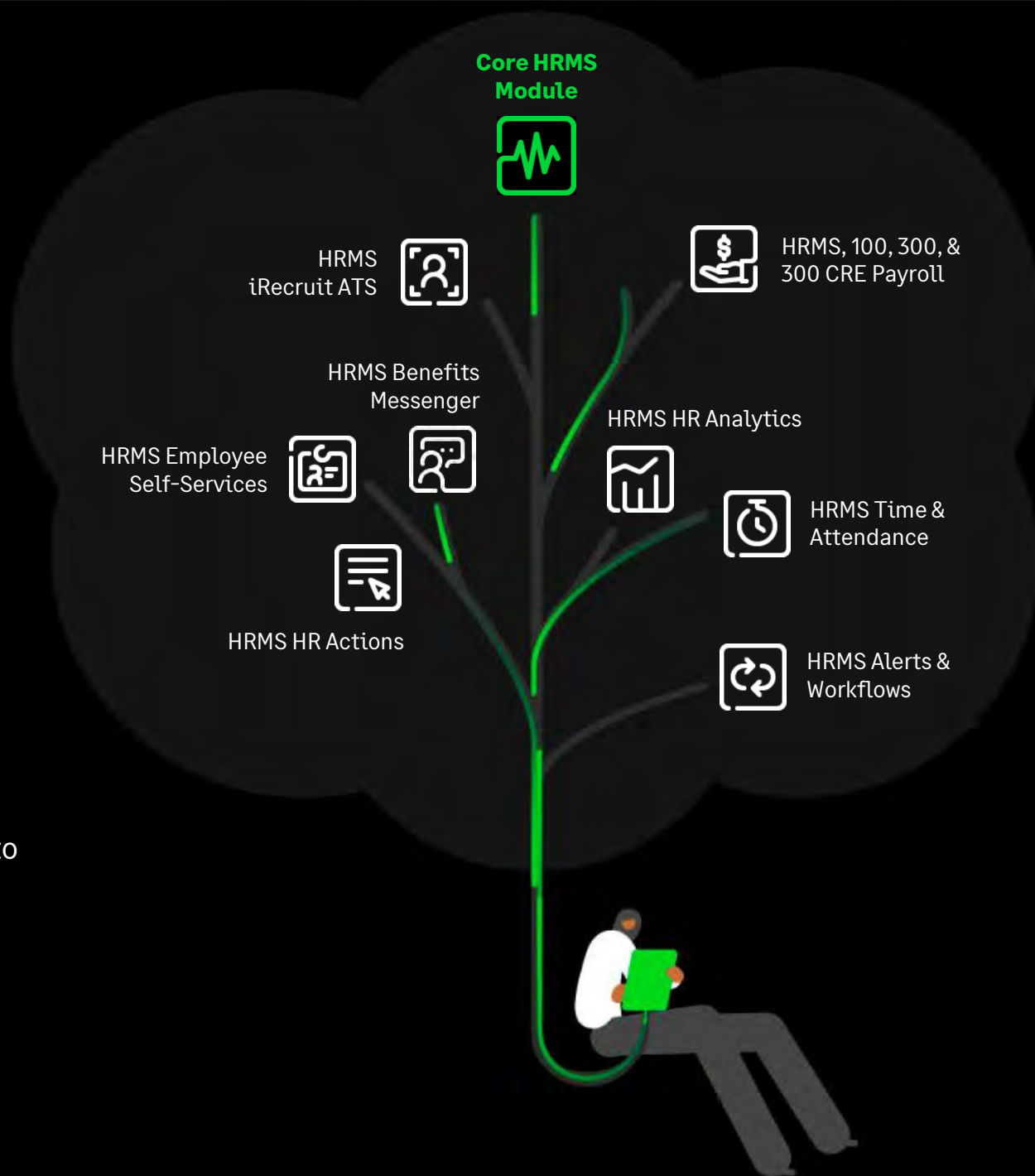
# Sage HRMS Core Integrations



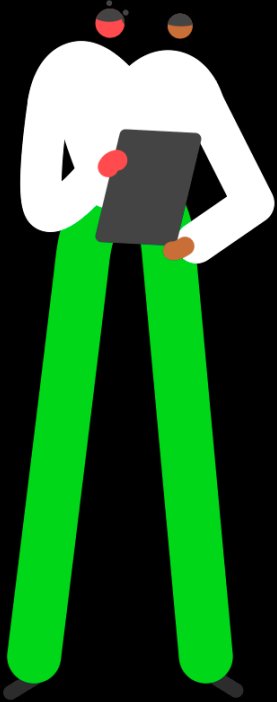
The Core HRMS module is the mothership of our solution and makes it easy for your HR team **to connect and manage all your employee-related information and processes in a single point** of truth.

The HRMS core module **includes the Sage Payroll link** that can easily transfer your employee records to Sage Payroll.

Now you have the **marriage of data, superior information sharing, tight integration**, and no duplicate data entry.



# Looking for a cloud experience?



## Sage HRMS Cloud Hosting

You can deploy Sage HRMS in the cloud with our Sage Business Partners such as [Cloud at Work](#), [Delphia Consulting](#), [SWK Technologies](#), and [DSD Business System](#).

### Key benefits:



Scale to meet your needs



Flexible deployment



Security



Reliability

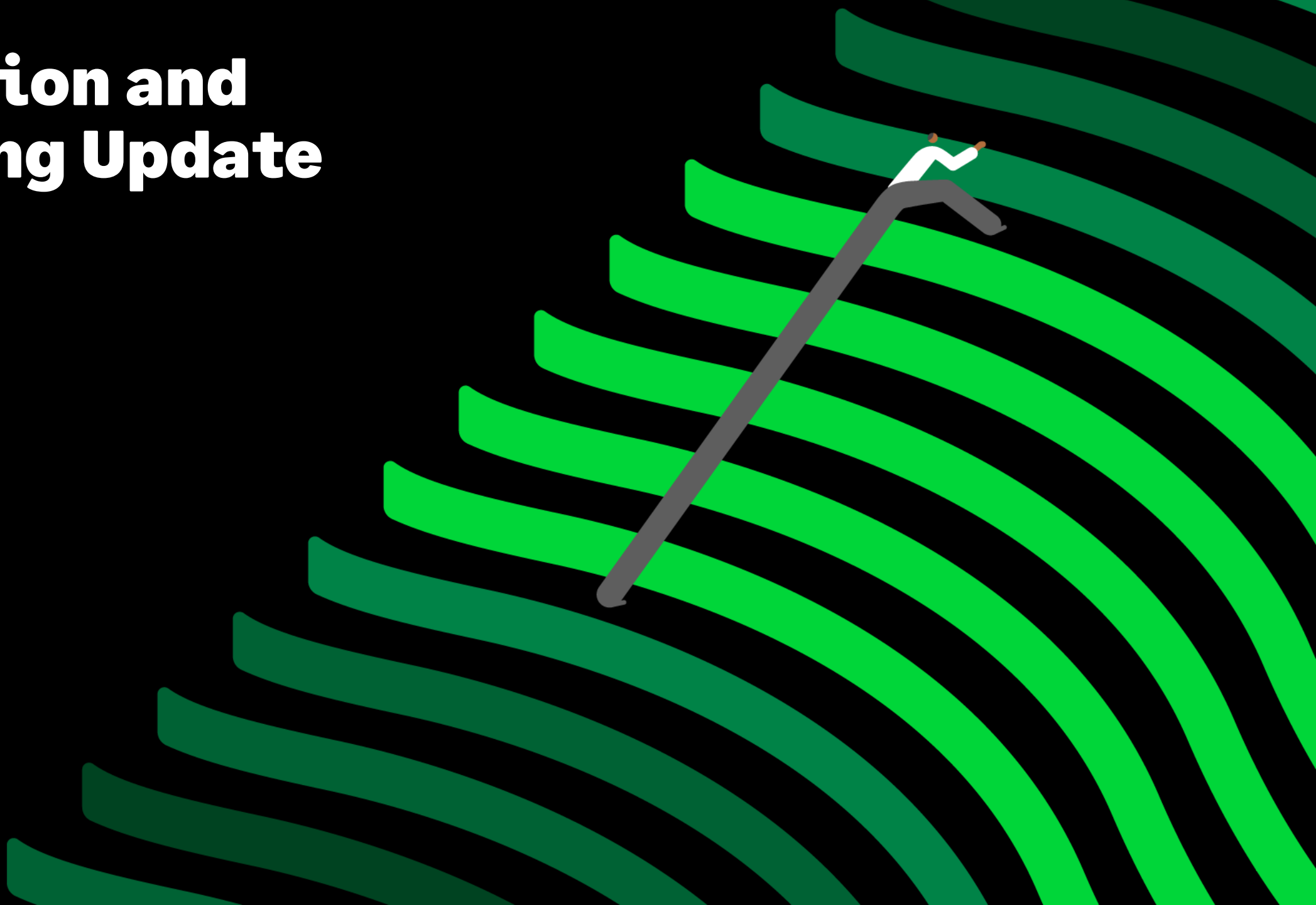


Remote Access



Data recovery

# Education and Training Update



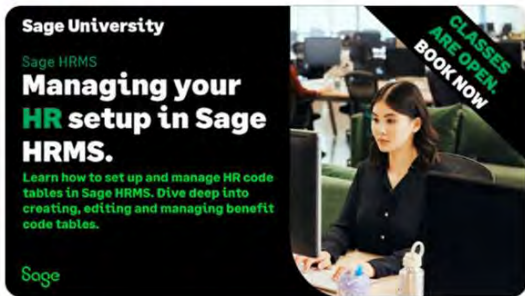
# Education and Training

Completed:

[www.sageu.com/SageHRMS](http://www.sageu.com/SageHRMS)

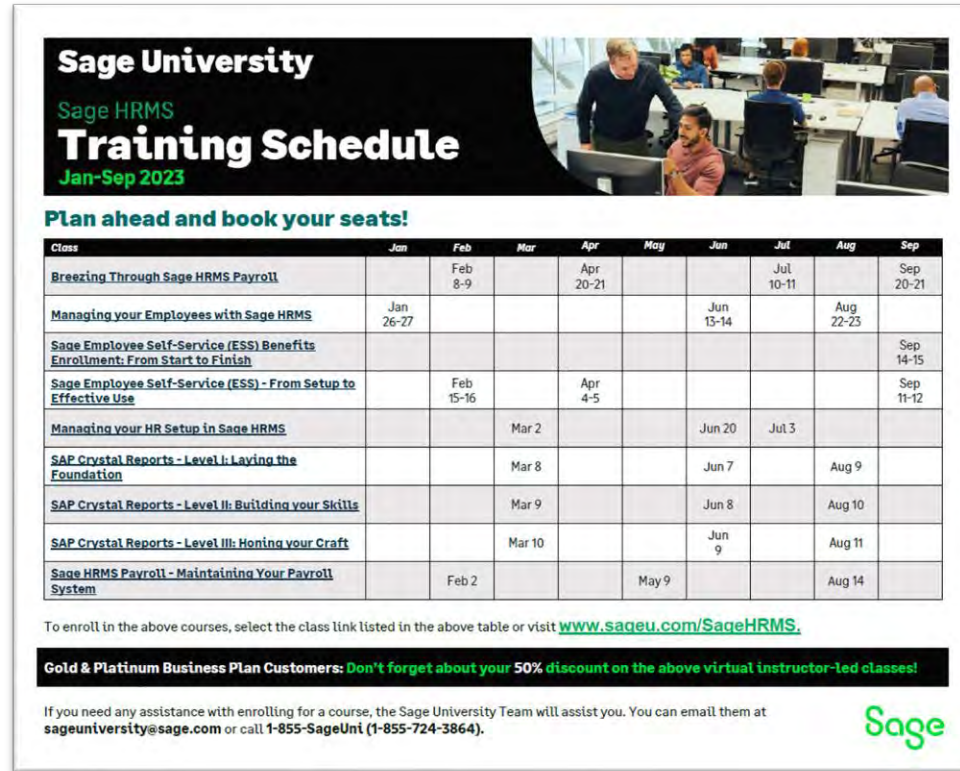
- Sage University – rebranded
- Market virtual in-person classes on Sage City/ Twitter
- Scheduled classes on Sage City

 Sage Support @SageSupport · Feb 20  
 LAST CALL to book for this training! Learn how to set up and manage HR code tables in #SageHRMS with our #SageU course. Class is running Mar 2, 2023  
 📍 1sa.ge/QRXQ50MPNmO



**Sage University**  
 Sage HRMS  
**Managing your HR setup in Sage HRMS.**  
 Learn how to set up and manage HR code tables in Sage HRMS. Dive deep into creating, editing and managing benefit code tables.

1 4 102



**Sage University**  
 Sage HRMS  
**Training Schedule**  
 Jan-Sep 2023


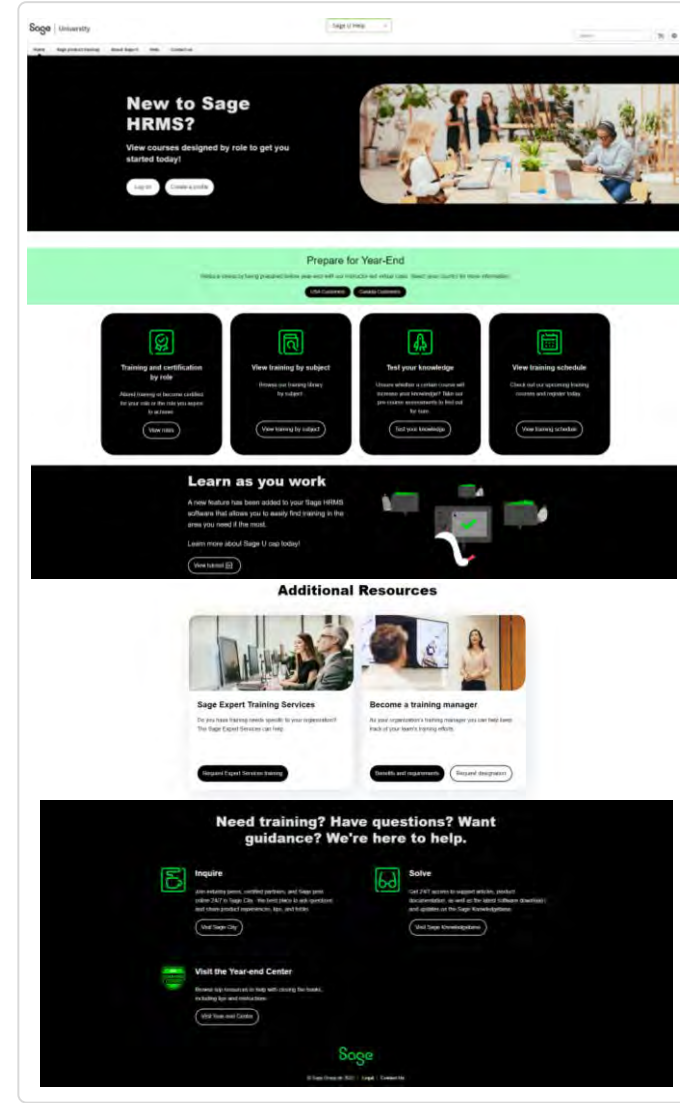
**Plan ahead and book your seats!**

Class	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
<a href="#">Breezing Through Sage HRMS Payroll</a>		Feb 8-9		Apr 20-21			Jul 10-11		Sep 20-21
<a href="#">Managing your Employees with Sage HRMS</a>	Jan 26-27					Jun 13-14		Aug 22-23	
<a href="#">Sage Employee Self-Service (ESS) Benefits Enrollment: From Start to Finish</a>									Sep 14-15
<a href="#">Sage Employee Self-Service (ESS) - From Setup to Effective Use</a>		Feb 15-16		Apr 4-5					Sep 11-12
<a href="#">Managing your HR Setup in Sage HRMS</a>			Mar 2			Jun 20	Jul 3		
<a href="#">SAP Crystal Reports - Level I: Laying the Foundation</a>			Mar 8			Jun 7		Aug 9	
<a href="#">SAP Crystal Reports - Level II: Building your Skills</a>			Mar 9			Jun 8		Aug 10	
<a href="#">SAP Crystal Reports - Level III: Honing your Craft</a>			Mar 10			Jun 9		Aug 11	
<a href="#">Sage HRMS Payroll - Maintaining Your Payroll System</a>		Feb 2			May 9			Aug 14	

To enroll in the above courses, select the class link listed in the above table or visit [www.sageu.com/SageHRMS](http://www.sageu.com/SageHRMS).

**Gold & Platinum Business Plan Customers: Don't forget about your 50% discount on the above virtual instructor-led classes!**

If you need any assistance with enrolling for a course, the Sage University Team will assist you. You can email them at [sageuniversity@sage.com](mailto:sageuniversity@sage.com) or call 1-855-SageUni (1-855-724-3864).

**New to Sage HRMS?**  
 View courses designed by role to get you started today!

**Prepare for Year-End**

**Learn as you work**  
 A new feature has been added to your Sage HRMS software that allows you to easily find training in the area you need it the most.

**Additional Resources**

**Sage Expert Training Services**  
 Do you have training needs specific to your organization? The Sage Expert Services can help.


**Become a training manager**  
 As your organization's training manager you can help keep track of your team's learning efforts.

**Need training? Have questions? Want guidance? We're here to help.**

**Inquire**  
 Our experts, certified partners, and Sage HRMS experts are here to help. We have over 20 years of experience and more than 100,000 users.

**Solve**  
 Our HRMS experts can help with any product, implementation, or data-related question and address all the Sage HRMS questions.

**Visit the Year-end Center**  
 We're here to help with closing the books, payroll, and more.



# Education and Training

## What's happening now:

**Spring into learning  
with Sage University  
and save 50%.**

Use coupon code: *Spring2350* at checkout<sup>1</sup>  
Promotion ends on March 31, 2023



## Promotion details:

- Customers and partners can **Save 50%** on selected Sage University courses for selected Sage products (*note the word selected as some products are not part of the promo*).
- Our customers/partners simply use the coupon code: **Spring2350** at checkout to receive the 50% discount.



# Education and Training

## In the works:

1. Redesign Sage University to have a better customer flow:
  - Training Catalogue
  - Getting started with Sage University how-to document
2. Updating and rebranding the content:
  - Create a new getting started anytime learning video(s)
  - What's new videos
  - Update training - 12 months process

## Web application for HRMS

Creating a training video on the new web application for Sage HRMS:

- Explain the different user interfaces
- How to navigate
- Showcase the features
- Training will be free

# Sage City

## Why join Sage City?

[https://www.sagecity.com/us/sage\\_hrms/](https://www.sagecity.com/us/sage_hrms/)

### Benefits:

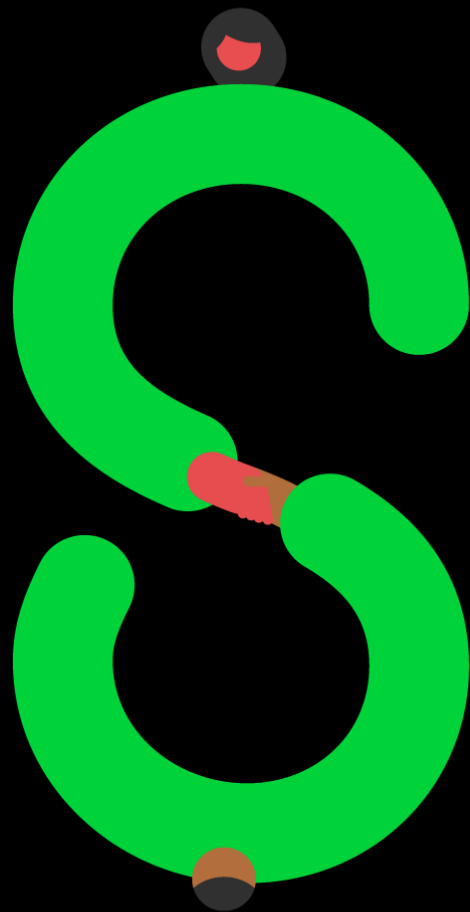
- Quick Links
- Forums
- One stop shop!

The screenshot displays the Sage HRMS Sage City community interface. At the top, there is a navigation bar with the Sage City logo, links for 'Product Support' and 'Community Help', a search bar, and a user profile icon. Below this is a green banner with the text 'Want to participate? Join the group to interact'. The main content area is titled 'Sage HRMS Announcements' and features three announcement cards:

- Using the Employee Selection List to reduce Payroll processing time.** (4 DAYS AGO)  
Payroll processing can take time with various tasks to complete each step...
- Welcome to the new-look Sage City!** (5 DAYS AGO)  
We've made some changes to make it easier for you to navigate, join forums...
- Webcast: Discover What's New in Sage HRMS – Join us on March 16, 2023** (7 DAYS AGO)  
[Webcast] Sage HRMS Q1 2023 release and Roadmap Readout Thu | Mar 16,...

On the right side, there is a 'Quick links' sidebar with three buttons: 'Year-end Center', 'Submit an idea', and 'Training Videos'. Below the announcements is a 'Browse Forums' section with three forum categories:

- Announcements**: 111 posts, 130 replies. Description: Read the latest news, updates, and information.
- General Discussion**: 381 posts, 1k replies. Description: Open forum for asking questions and sharing product knowledge ...
- Sage HRMS Training**: 136 posts, 227 replies. Description: Test your knowledge while learning about specific features of ...



Sage

**Thank you!**

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