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sage
Authorized Partner

EXPLORING REPORTING OPTIONS IN SAGE HRMS

You probably already know that Sage HRMS comes with loads of standard and custom reports. Whether it's for government compliance, payroll analysis, or strategic evaluation of your workforce, here's a look at some of the reporting and analytics options you should know about.

Starting with the Basics

With over 100 pre-configured reports on Employees, Time Off, Payroll, and Training, Sage HRMS likely has a pre-formatted report to meet the basic needs of most organizations. Simply navigate to the reports section, scroll through the list of available reports, define the report criteria (by date, employee, etc.), and then print, preview on-screen, or export the data.

Customization That's Crystal Clear

When you need a custom report that isn't available "out of the box," then it's time to look to the **SAP Crystal Report™** writer that's included with your Sage HRMS system. With the right skill set your options are limitless. Using this powerful tool allows you to create presentation-quality reports on just about anything in the Sage HRMS database - and in any format you want. *Contact us if you'd like to learn about Crystal Reports training opportunities.*

Running a Quick and Custom Query

Another reporting option is the Wizard-driven **Sage HRMS Secure Query** - a desktop query and reporting tool that allows you to easily generate ad-hoc and custom reports. You can select which fields to output, sort results, build record filters, and group or summarize data. You can then output your query as a report, spreadsheet, or database table. It's a simple, yet powerful tool for those that aren't comfortable with the Crystal Report writer.

Getting Visual with Analytics

If you're someone that's visual - or you just want to take your reporting to the next level - then it's time to look at **SAP Crystal Dashboard Design®**. This optional add-on/extension for your Sage HRMS system transforms spreadsheet data into charts, graphs, dashboards, and visual what-if scenarios that allow you to dive deep and analyze important workforce performance metrics. The stunning visual displays are easy to create using a point-and-click interface.
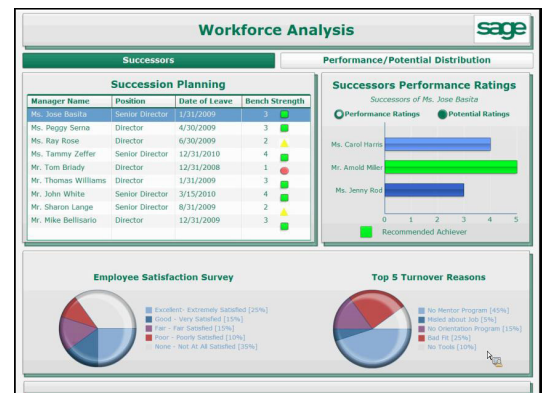
[Download the Feature Sheet to Learn More](#)

Contact us if you need help customizing, configuring, or understanding your reporting options in Sage HRMS or Sage Abra Suite.

Access Your Payroll History Online

Did you know that as a Sage HRMS customer, you and your employees can access payroll history online? By logging into **Sage Source** - a cloud application and online portal - you get anytime access to valuable business resources that complement your Sage HRMS system.

Using your laptop, tablet, or mobile device, you can log on to Sage Source and take advantage of these features:

- **Pay History** - provides a summarized and historical view of payroll information that's accessible online.

- **Company Announcements** - communicate company-wide announcements to employees in the office or on the road.

- **Company Directory** - easy access to employee contact information like names, phone, and employee photos.

- **File Cabinet** - secure, online document repository for easy access to commonly used files.

Perhaps best of all, Sage Source is a free benefit to all Sage HRMS customers on a current Business Care plan. All you have to do is register and start taking advantage today!

Register at: https://app.sagesource.com/portal/signup

Using Audit Trails to Track Changes in Sage HRMS

Need to find out who's making changes in your system in order to safeguard your Sage HRMS data? When **Audit Trail** functionality is enabled, you can determine who is making changes, how many are made, and how often corrections are applied.

To enable the Audit Trail features, go to **Navigation Pane** > **Setup** > **System and Enterprise Setup** and select the *Audit Trail Setup* tab.

1. Verify that the option to "**Enable Auditing**" is set to **Yes**.

2. Choose "**Select File to Audit**" from the drop-down list.

3. Check the box next to "**Enable File Audit**".

4. From the "**Audit All Fields in File**" drop-down list box select **Yes** to set the audit trail for all fields, or select the individual fields to audit by placing a check in the "**Audit**" column next to the field description.

Going forward, you can view any of the built-in Audit Trail Reports (**Navigation Pane** > **Reports** > **System & Audit Trail Reports**) which will provide a before and after image of changes by user, by date, and by file/field. Or you can create a custom view using the Crystal Reports writer.

TROUBLESHOOTING TIP:

"Localized Resource Not Available"

Have you ever received that message when printing/posting checks in Sage HRMS 2012? If so, we have a resolution.

At the end of the print/post step, Sage HRMS automatically attempts to post the payroll info to the Sage Employee Self Service (*ESS*) product. The message displays when ESS is not installed and Sage HRMS does not know what to do since the site cannot be found.

If you do not use ESS, this error can be resolved as follows: Go to **Setup** > **System** > **Enterprise Setup**. In the lower right corner of the **Enterprise Options** tab, change the "*Populate Payroll History*" option to "**No**" and click "**OK.**"

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