

Simply Accounting HR Manager



Installation Guide



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Sage Software Canada, Ltd.

Simply Accounting by Sage HR Manager 2009 Installation Guide

Welcome to our quick installation guide designed to help you install and get up and running with Simply Accounting by Sage HR Manager 2009.

The table of contents, below, lists each section in this guide for ease of reference.

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Preparation

System Requirements

Before installing HR Manager, you should check that your PC meets the system requirements.

Minimum System Requirements

Pentium® III (or equivalent), 1 GHz or higher (Pentium 4, 2 GHz recommended)
512 MB of RAM (1 GB recommended)
700 MB of free hard disk space
Microsoft® Windows® 2000, Windows XP (recommended), or Windows Vista®
256-color or higher

Language Requirements

You may install either the English or French version of HR Manager. English version only works on English OS and French version only works on French OS. HR Manager is not bilingual.

Note: The OS regional settings language options should match your OS installation language in order to ensure correct installation and operation of HR Manager.

Antivirus Settings

If you carry out a standalone or server installation of HR Manager, ensure that on-access scanning by antivirus software is not enabled for the temporary folder used by Sage MySQL. You should also ensure that if you are creating a backup, your antivirus software is not running a system scan at the same time.

The location of the Sage MySQL temporary folder is as follows:

- **Windows 2000, Server 2003, XP** – C:\Documents and Settings\All Users\Application Data\Temporary SageMySQL Files
- **Vista** - C:\Program Data\Temporary SageMySQL Files

If you do not prevent your antivirus software from scanning this folder as explained above, it may prevent successful backup and cause HR Manager to lock up.

Preparing to Install

Before you install HR Manager, please work through the following checklist:

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- ❑ Log on to the PC as Administrator or a user with full administrative privileges.
 - ❑ Check that your PC meets the system requirements detailed above.
 - ❑ Ensure that any antivirus software on your PC is deactivated for the duration of installation or that on access scanning does not run on the Temporary SageMySQL Files folder. For further information about this, please refer to the Antivirus Settings section on the previous page.
 - ❑ Ensure that your Windows Operating System Regional Settings are set to the correct country and language for the product you intend to install. For further information about Regional Settings, please refer to your Systems Administrator.
 - ❑ Close all programs on your PC, including other Sage programs.
 - ❑ Check that you have Internet Explorer v6 or higher installed on your PC.

If you do not have Internet Explorer v6 installed, please refer to the steps in the section Installing Internet Explorer v6.

If you already have Internet Explorer v6 or higher installed, please proceed to the section Installation Types.

Installation Types

To install HR Manager on your PC, first ensure you have completed the Preparing to install section earlier in this guide, including the Antivirus Settings section. You can then continue to install HR Manager.

In the early stages of the installation routine, you must choose the type of installation you want to perform:

- Standalone – If you want to run the program and store the data on the same PC, use this option.

Note: For multiple user installations, please refer to the Client and Server installation types later in this guide.

- Client – If you want to run the program on one PC or more, and store the data in another location, use this option.
- Server – To store only data, use this option.

Note: A Standalone installation is only required on the server if the server is a PC that will also be used to access HR Manager.

Standalone Installation

1. Close all programs running on your PC, ensure that your Regional Settings are set to the correct country, then insert the HR Manager CD into your CD drive.

If the installation does not start automatically, open the Start menu, choose Run then, in the Open box, type **d:\start**.

Note: If your CD drive letter is different to that shown above, please replace **d** with the appropriate letter.

If the installation file was downloaded from Sage, double click it to start the installation.

2. An information window appears which you **must read**, then to continue, click Next.

If you are installing on a Domain Controller, an additional information window appears which you **must read**, then to continue, click Next.

3. In the End User License Agreement window, when you have read the terms and conditions, to continue with the installation, click Yes.

The Select Installation Type window appears.

4. To start the Standalone installation, click Standalone.

The Select Features window appears.

5. To continue, click Express or Custom Install. If you selected an Express Install, please proceed to step 11.

Note: We recommend that if you use a Custom Install you only change the destination folder and do not remove any of the components.

If you selected a Custom Install, the Select Components window appears.

6. If there are any components you do not want to install, clear the corresponding check box.

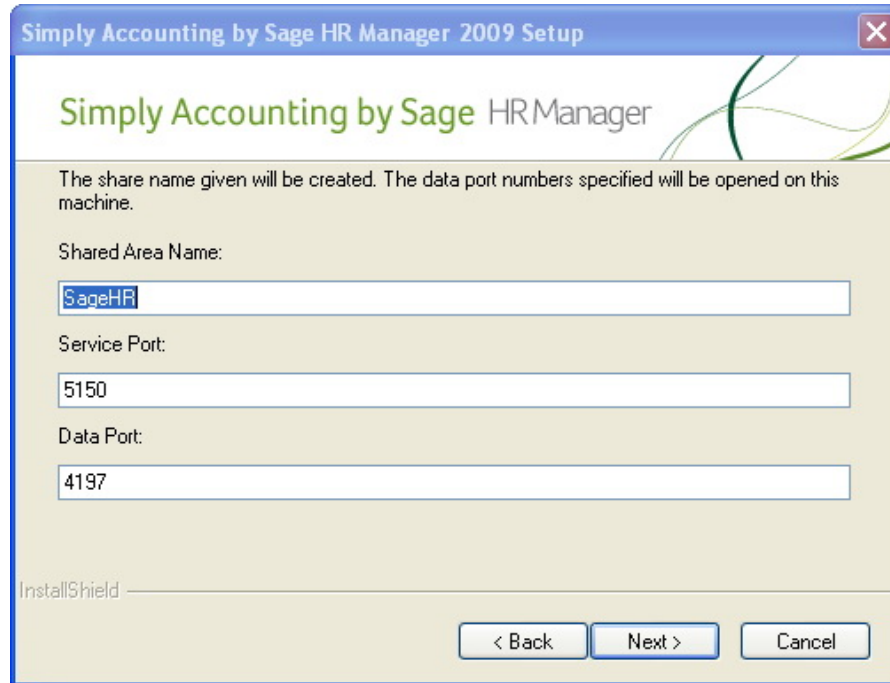
Note: We recommend you do not clear these check boxes unless advised to do so by Sage Technical Support.

7. If required, to change the destination folder, click Browse, locate and select a new installation folder and click OK then to continue, click Next.

The Select Program Folder window appears.

8. In the Program Folder box, enter a folder name. Alternatively, from the Existing Folder list, select the required folder or to accept the default folder, click Next.

The Server Information window appears.



9. If required, in the Shared Area Name box, enter a new name with **no spaces** then to continue, click Next.

Note: The Shared Area Name is the name of the Windows share by which client PCs access the HR Manager data. We recommend you accept the default Service Port and Data Port numbers.

The Start Copying Files window appears.

10. From the Start Copying Files window, check that the information you have supplied is correct then to continue, click Next.

HR Manager begins installing on your PC.

A black DOS style window may appear.

Note: If you are installing on Windows Vista, the DOS window does not appear and the installation may appear to have stalled. Please wait for it to continue. This may take several minutes.

11. When the InstallShield Wizard Complete window appears, we recommend that you select Yes, I want to restart my computer now then click Finish.

You **must** restart your PC before you start to use HR Manager.

Note: HR Manager creates a Windows® user group named SageHR. Only the user logged in when the program was installed is added as a member of this group and only that user can access the program. For anyone else to use HR Manager and access the data, they **must also** be added to the SageHR group. This ensures the security of your HR Manager data and any attached documents. In a **Domain Controller** installation, the group Sage50HRGlobal is set up. For further information about this, please refer to the section Security and Access Rights.

Multi-user Installation

If you have purchased a multi-user copy of HR Manager 2009, you must install it on all PCs that will access HR Manager data. Before accessing HR Manager on the client PCs, install HR Manager on the PC designated as the server as follows:

- Server PC used to store data only – Install HR Manager, choosing the server installation type.
- Server PC used to store and access the data - Install HR Manager choosing the standalone installation type.
- Run the installation routine for a client installation on every PC that requires access to HR Manager.

HR Manager multi-user allows you to use the same set of data on multiple PCs, so that different people can access data at the same time. The Server PC holds the company data, and the other PCs, referred to as clients, can access the data held on the Server PC. You must install HR Manager on each PC individually.

Note: If you want to use the server PC both to store the data and to work in HR Manager, you should carry out a standalone installation on the server. If you want to store data only on the server, perform a Server installation.

Server Installation

Note: If you want to use HR Manager on the server PC, complete a standalone installation, if not, complete a server installation.

To perform the server installation

1. Close all programs running on the server and ensure that the regional settings are set to the correct country then insert the HR Manager CD into the CD drive.

If the installation does not start automatically, open the Start menu, choose Run then, in the Open box, type **d:\start**

Note: If your CD drive letter is different to that shown above, please replace **d** with the appropriate letter.

If the installation file was downloaded from Sage, double click it to start the installation.

2. An information window appears which you **must read** then to continue, click Next.
3. In the End User License Agreement window, when you have read the terms and conditions of the End User License Agreement, to continue with the installation, click Yes.

The Select Installation Type window appears.

4. To continue, click Server.

The Server Information window appears.



5. If required, in the Shared Area Name box, enter a new name with **no spaces** then to continue, click Next.

Note: The Shared Area Name is the name of the Windows share by which client PCs access the HR Manager data. We recommend you accept the default Service Port and Data Port numbers.

The Start Copying Files window appears.

6. From the Start Copying Files window, check that the information you have supplied is correct then to continue, click Next.

HR Manager begins installing on the server PC.

7. When the InstallShield Wizard Complete window appears, select Yes, I want to restart my computer now, then click Finish.

You **must** restart the server before you start to use HR Manager.

Note: HR Manager creates a Windows® user group named SageHR. Only the user logged in when the program was installed is added as a member of this group and only that user can access the program. For anyone else to use HR Manager and access the data, they **must also** be added to the SageHR group. This ensures the security of your HR Manager data and any attached documents. In a **Domain Controller** installation, the group Sage50HRGlobal is set up. For further information about this, please refer to the section Security and Access Rights.

Client Installation

Note: Before you install HR Manager on the client PCs, ensure you have added each required user to the SageHR or Sage50HRGlobal Windows user group. For further information about this, please refer to the section Security and Access Rights.

When the server installation is complete, you must install HR Manager on the client PCs. These PCs hold the program files on their own hard disk, but use the shared data held on the server.

To perform a client installation

1. Close all programs that are running on the client PC and ensure that the Regional Settings are set to the correct country then insert the HR Manager CD into the CD drive.

If the installation does not start automatically, open the Start menu, choose Run then, in the Open box, type **d:\start**.

Note: If your CD drive letter is different from that shown above, please replace **d** with the appropriate letter.

If the installation file was downloaded from Sage, double click it to start the installation.

2. In the End User License Agreement window, when you have read the terms and conditions, to continue with the installation, click Yes.

The Select Installation Type window appears.

3. To start the Client PC installation, click Client.

The Select Features window appears.

4. To continue, Click Express or Custom Install. If you selected an Express Install, please proceed to step 11.

Note: We recommend that if you use a Custom Install you only change the destination folder and do not remove any of the components.

If you selected a Custom Install, the Select Components window appears.

5. If there are any components you do not want to install, clear the corresponding check box.

Note: We recommend you do not clear these check boxes unless advised to do so by Sage Technical Support.

6. If required, to change the destination folder, click Browse, locate and select the required folder and click OK then to continue, click Next.

The Select Program Folder window appears.

7. In the Program Folder box, enter a folder name or, from the Existing Folder list, select a folder. To accept the default folder, click Next.

The Server Information window appears.



Note: We recommend you accept the default Port Address.

8. If you know the network name of the server PC, enter it in the Server Name box. To locate the server PC on the network, click Browse.

The Select a Domain or Server window appears.

9. From the list of possible locations, select the server PC then click OK.

If you select a PC where HR Manager is not installed or where the user groups

have not been set up correctly, an error message appears

To continue, click OK and specify the correct server location.

The Start Copying Files window appears.

10. From the Start Copying Files window, check that the information you have supplied is correct then to continue, click Next.

HR Manager begins installing on your PC.

Note: A black DOS style window may briefly appear.

11. When the InstallShield Wizard Complete window appears, select Yes, I want to restart my computer now, then click Finish.

You **must** restart the PC before you start to use HR Manager.

Note: HR Manager creates a Windows® user group named SageHR. Only the user logged in when the program was installed is added as a member of this group and only they can access the program. For anyone else to use HR Manager and access the data, they **must also** be added to the SageHR group. This ensures the security of your HR Manager data and any attached documents. In a **Domain Controller** installation, the group Sage50HRGlobal is set up. For further information about this, please refer to the section Security and Access Rights.

Security and access rights

Before you can use HR Manager, you must ensure that all required users have been added to the Windows security group that controls access to the data.

If you are installing on a Domain Controller, please refer to the section To add users to the Sage50HRGlobal Group later in this guide. If you are installing on systems other than Domain Controller, please refer to the following section.

To add users to the SageHR Group

To ensure security of your HR Manager data, a new Windows® Group named SageHR is created. The only member of this group is the user who installed HR Manager. For anyone else to access HR Manager data, they **must** be added to the group.

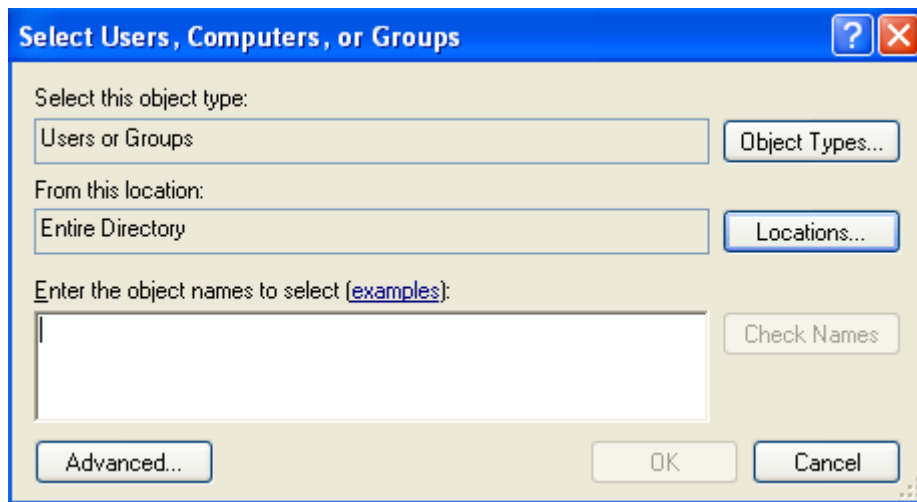
1. From the Windows® desktop, right-click My Computer, choose Manage then in the Computer Management window, from the left-hand pane, double-click Local Users and Groups then click Groups.

The SageHR Group appears in the right-hand pane.

2. From the list in the right-hand pane, double-click SageHR then in the SageHR Properties window, to add a new member, click Add.

The Select Users, Computers, or Groups window appears.

Note: This procedure is documented using Microsoft Windows® XP. If you are not using XP, some of the on-screen options may be different.



3. In the Select Users, Computers, or Groups window, complete the information as follows:
 - Select this object type - Users or Groups appears by default. You can change the object type to include Computers. To do this, click Object Types then select the Computers check box and click OK.
 - From this location - The network domain of the user who installed HR Manager appears. If required, to change the network domain, click Locations then select the required domain and click OK.
 - Enter the object names to select - Enter the required user name, for example, SageHRuser. To confirm you have entered this correctly, click Check Names.
4. To continue, click OK.

The SageHR Properties window appears and the added user appears in the Members list.

Note: To add further members, repeat steps 2 to 3.

5. When you have added all required users, to return to the Computer Management window click OK then to return to the Windows desktop, click the red X button in the top right-hand corner of the window.

If, at a later date, you require further help adding users to the SageHR Group, from within HR Manager, press F1 then locate the following help section:

- Keeping your information secure > Restricting access to Simply Accounting by Sage HR Manager using Microsoft® Windows

To add users to the Sage50HRGlobal Group – Domain Controller

Note: If you are in any doubt about editing these user groups, please refer to your systems administrator.

To ensure the security of your HR Manager data, within Active Directory two new Domain Groups, named Sage50HRGlobal and Sage50HRLocal are created. Access to stored documents that are sensitive, such as employee appraisals using Windows Explorer, is restricted using these groups. The only member of this group is the user who installed HR Manager. If anyone else needs access to HR Manager, they must be added to the Sage50HRGlobal Group.

1. On the Domain Controller, open the Start menu, choose Administrative Tools, then double-click Active Directory Users and Computers.

The Active Directory Users and Computers window appears.

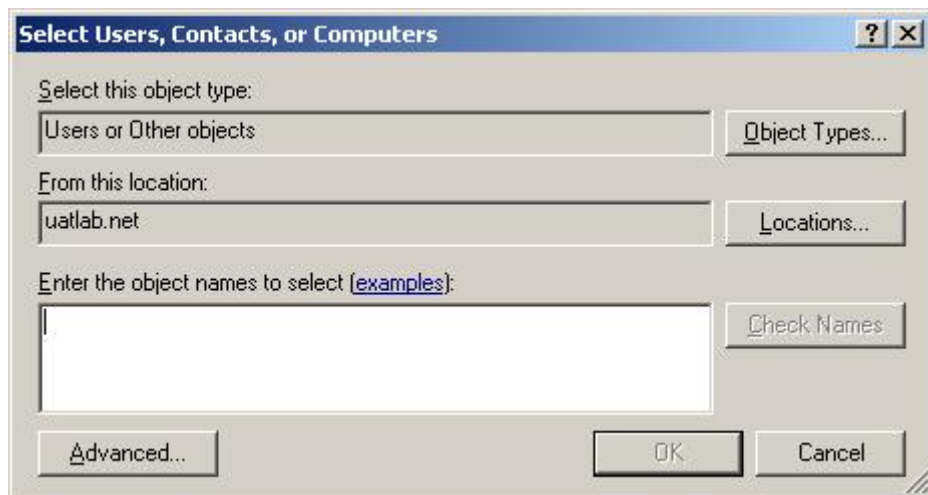
2. From the left-hand pane, double-click your domain name click Users then from the Users information window, from the list of users, double-click Sage50HRGlobal.

The Sage50HRGlobal Properties window appears.

3. To add a new member, click the Members tab then click Add.

The Select Users, Contacts, or Computers window appears.

Note: This procedure is documented using Microsoft Windows Server 2003. If you are not using Windows Server 2003, some of the on-screen options may be different.



4. Complete the information in the Select Users, Contacts, or Computers window as follows:

-
- Select this object type – By default this is set to Users or Other objects. If required, you can change the object type to include Computers. To do this, click Object Types then select the Computers check box and click OK.
 - From this location - The network domain of the user who installed HR Manager appears. If required, to change the network domain, click Locations then select the required domain and click OK.
 - Enter the object names to select - Enter the required user name then to confirm you have entered this correctly, click Check Names.

5. To continue, click OK.

The Sage50HRGlobal Properties window appears and the added user appears in the Members list.

Note: To add further members, repeat steps 2 to 4.

6. When you have added all required users, to return to the Computer Management window click OK then to return to the Windows desktop, click the red X button in the top right-hand corner of the window.

Before running HR Manager, any user that you have added to the Sage50HRGlobal group must log off from the network and log on again.

Windows permissions

To access the HR Manager data, each user of the software must be granted permission to do so using Windows permissions.

1. On the server PC, navigate to C:\Documents and Settings\All Users\Application Data\Sage\HR.
2. Right-click the HR shared folder, choose Sharing and Security then click the Sharing tab.
3. Click Permissions then to add a user, click Add.
4. Enter the user's network name, click Check Names then, when the name becomes underlined, click OK.

Tip: If sharing over a network, ensure no local user names are selected

5. From the Group or user names list, select the user then in the Permissions for area, ensure the Full Control check box is selected and click OK.
6. When all users are set up, click OK then click the Security tab and repeat step 5 then to close the HR Properties window, click OK.

Getting Started

Register HR Manager

When you first open HR Manager after installation, you are prompted to enter your serial number and activation key.

If you acquired your HR Manager directly from Sage, check your registration confirmation email for your serial number and activation key.

If you purchased HR Manager at a retail store, please contact Sage to register for your serial number and activation key. You can phone or visit the online registration website.

Contact Sage

Telephone Registration: 1-888-261-9610 option 6

Online Registration: <http://www.simplyaccounting.com/keyreg/>

Create your company

1. Open HR Manager and when prompted, enter the serial number and activation key, then click Continue. For further information about your serial number and activation key, please refer to the section To Register HR Manager.
2. In the New Company window, enter the name of the company or the name you want to appear on reports.

Note: If you are connecting to the data from a client PC, only the first to connect sees the database creation progress window.

3. To continue, click Create then in the New company window, complete the Details window as follows:

Note: Mandatory fields are marked with an Asterisk (*).

- Name * - Enter the full name of the company.
- Address - Enter the postal address of the company.
- Postal Code - Enter the postal code for the above address.
- Telephone - Enter the company telephone number.
- Fax Number - Enter the fax number for the company.
- E-Mail - Enter the company email address.
- Website - If applicable, enter the URL of the company website.

Tip: If required, to save the company name only and close, click Save.

-
4. To continue, click Settings then complete the Settings window as follows:
 - Retirement Age - Enter the expected retirement age for employees.
 - Start Date - Holiday year date range is created by default, from January 1 for 10 years prior to the current year and for three years into the future.
 - End Date - Holiday year end dates are created automatically to December 31 for 10 years prior to the current year and for three years into the future.
 - Entitlement - The default number of days is 10. This can be adjusted.
 - Additional Entitlement - If you allow any additional holiday days, enter the required number.
 - Allow B/F Entitlement - If you allow employees to bring forward unused holidays from the previous year, select this check box.
 5. In the Documents window, to append any documents that you want to include at this stage, click Add Document.
 6. In the Notes window, enter any additional information, for example, an explanation of the holiday scheme.
 7. To save the company information, click Save.

Lookup Lists

There are a number of windows within HR Manager that contain Lookup Lists, which must be completed. In some cases you cannot save your data without choosing an item from a Lookup List. It is a good idea to set up as many of your Lookup Lists as possible prior to beginning your data entry. For information about setting up Lookup Lists, please press F1 and refer to the help.

Working Patterns

Working patterns represent the periods within each week you employ people to work for you. For example, you might employ some people to work week-days only and others to work week-ends; or some to work mornings and others to work afternoons.

You define the working patterns in use within your company and then assign one or more of them to each of your employees, as part of their employee records. You can also define a default working pattern to be used automatically for all new employees.

Importing Employee Records

Employee records exported from Simply Accounting can be easily imported into HR Manager. For information about exporting records from Simply Accounting, refer to the Simply Accounting online help.

To import employee records

1. From the File menu, click Data Import then select Import Simply Accounting data.
2. Click Next to select the Employee details record template.
3. Click Next and enter the location of the Simply Accounting employee data file that has already been exported into a text file, or click Browse and search for this file.

Note: If you click Browse to search for the file, in the dialog box, change the file type to "Text Files (*.txt)".

4. Click Finish and wait while the wizard carries out the import process.
5. To ensure that all the data you are expecting has been imported, check the import log file.

Organizational Units

Does your business have more than one department? Or perhaps your company is divided between different buildings? Maybe your employees work in several teams?

You can set up HR Manager to reflect your business structure. Using 'organizational units', you can organize your employees into the structure that suits your company best - for example, by locations, buildings and floors, or perhaps by divisions, departments and teams.

Using organizational units helps you to:

- Organize your employees into manageable units that reflect how your organization is structured.
- Quickly locate employee records using the structure defined.
- Print a report showing which employees belong to what organizational unit.

To create organizational units

1. Click Company > Organizational Units
2. Click New and enter your organizational unit description details in the dialog box provided. Click Save.

Security and Access Rights

To secure HR Manager with a password

You need to appoint a program administrator to look after the security of HR Manager. The administrator logs on as “Manager” and secures HR Manager with a password.

1. Open HR Manager and when prompted to enter a user name and password, enter the user name Manager then click OK.
2. Open the Tasks menu, choose Security then choose Change User Password.

Manager appears in the Logon Name box.
3. In the New Password and Confirm New Password boxes, enter the required password then to save the password, click OK.

Employee groups

Employee groups control the employee records a program user can work on. Without access to a particular group the user cannot see any information, or perform any tasks, for the employees assigned to that group. For information about setting up employee groups, please press F1 and refer to the online help.

Create your employee groups first, then continue to create your User Groups.

User groups

User groups define the tasks that users of HR Manager can carry out and the employee groups that they can work with. For example, each user group may reflect a role within your organization. For information about setting up user groups, please press F1 and refer to the online help.

You must create User Groups before creating individual users.

To assign user names and passwords

1. Open the Tasks menu, choose Security then choose Users and click New.
2. Enter a user name and password then choose the required user group.

The Help System

HR Manager contains a comprehensive Help system designed to provide step-by-step help with the program.

To open the Help system at the section relevant to the window you are currently using, press the F1 key.