



# STAR-INFO

Newsletter for Sage Abra HRMS

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## Headline News

Sage Summit 2011 takes place in National Harbor, Maryland on July 10-15, 2011.

The Gaylord National Convention Center will play host to the first joint Partner and Customer Sage Summit. There is no better place to learn tips, techniques, and proven tactics to help you excel at your job and add value to your organization.

[Click here](#) for details.

## The Data-Driven HR Organization

### How To Achieve It And Benefit From It

**D**o you spend too much of your time answering questions, putting out fires, and fixing problems? In this article, we discuss how you can become a proactive, data-driven organization, benefiting from timely notifications from your Sage Abra HRMS system that alert you to events or situations that require your attention.

#### The Decision-Making Process

In today's hurried business environment, decisions may be made rapidly, and without the proper data to support them. Without data to support your decisions how do you know you are making the right ones?

In the data-driven organization, you and your management team receive insightful information from your system to support fast, fact-based business decision making.

#### The Voice Of Your Data

Many HR managers spend too much time wading through voluminous reports to gain the business intelligence needed to determine if any problems exist or to see if the data supports a specific decision. And HR may spend a lot of time researching queries from employees and line managers who do not have access to HR information.

In a data-driven organization, if you can identify the data or situations you need to be aware of, your Sage Abra system can alert you and anyone else in the organization when business conditions arise that need your attention.



Here is an example of what can happen when an organization is not data driven:

ABC Company's monthly overtime rarely exceeds 50 hours. However, halfway through the month, 40 hours of overtime already have been accrued, but no one is aware of it because the overtime report will not be run until the end of the month. The consequences of not knowing could range from exceeding the monthly budget to not being able to meet payroll.

In a data-driven organization, the overtime report is set to run automatically and is delivered to the appropriate personnel whenever the overtime amounts accrue at a rate that will likely exceed the monthly maximum.

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## The Data-Driven HR Organization

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### What Your Data Can Tell You

In a data-driven HR organization, the data can let you know that a decision needs to be made, and also provide information to support effective decision making. Sage KnowledgeSync for Sage Abra HRMS and Sage Abra Alerts can deliver information to you to let you know that something has happened, or is due to happen so you can make the most appropriate decision based on that information.

While the possibilities are practically endless, here are a few examples of business conditions where Sage KnowledgeSync or Sage Abra Alerts can deliver data to you and notify you of situations requiring your attention:

- » An employee's certifications are about to expire.
- » Department is recording above-average sick leave time.
- » Employee is due for his performance review next month.
- » Employees having failed drug tests within the last three months.

How does the system know? Sage Abra stores a lot of information about date-sensitive conditions, numeric thresholds, and upcoming dates. It can also advise you about things that should have happened but did not, such as the review of a job candidate's résumé.

### Exception Management

Exception management is another challenge for HR professionals. Many organizations run exception reports periodically, and require an HR manager to review the report and take necessary action. But what if a serious exception occurs between report runs, such as a pay raise greater than 15 percent? Your system can monitor for exceptions and deliver the reports to the appropriate recipients. It even can automatically execute the

appropriate actions, such as notifying an employee of an overtime freeze.

### Business Activity Monitoring

The technology that can help your organization become data-driven is called Business Activity Monitoring, and is also sometimes known as Operational Business Intelligence. This technology performs the automated monitoring of the conditions in your data that are important to your organization. It can deliver alerts to the right people, distribute reports and forms with the right information, and perform these tasks in the correct order and at the optimal time.

The Business Activity Monitoring tools for Sage Abra are Sage KnowledgeSync. Out of the box, Sage KnowledgeSync comes with 40-50 preconfigured business conditions, including:

- » Applications that have been received, reviewed, or approved/rejected
- » Changes in an employee's benefits
- » Certifications that are about to expire.
- » Unusually high number of absences
- » Upcoming performance reviews
- » Pay rate changes
- » Leave of absence starting or ending soon.

You can monitor an unlimited number of additional conditions. Sage KnowledgeSync Alerts also can monitor conditions in your accounting, manufacturing, and customer relationship management data. This allows you to correlate HR performance with other parts of your organization, such as whether an employee with excessive sick time is also failing to meet sales quotas, as indicated by your CRM application.

### Delivery Options

When system data triggers an alert it can be delivered by e-mail, cell phone, pager,

PDA, fax, screen pop-up, or web form. All e-mail systems are supported, and you can even configure the system to ensure that alerts reach their intended recipient, and if they do not, send the alert to an alternate person.

### Even More Power

You can configure alert dashboards and web pages that show all the alerts being sent. Sage KnowledgeSync also includes the ability to generate and deliver relevant forms, documents, and reports by e-mail, Web, and FTP. For example, if an employee's review is due, Sage KnowledgeSync can generate a review form—prefilled with employee information—and send it to the employee's manager. Sage KnowledgeSync embeds Crystal Reports®, so that any reports that you already have can be generated and delivered by Sage KnowledgeSync. In this way, you can produce your organization's normal daily, weekly, and monthly reports automatically without a staff member having to remember to manually generate them.

### Workflow Option

The Workflow option gives you the power to actually update data fields in Sage Abra, such as updating the status to approved on a vacation request, or updating employee history with the details of an absence.

With Sage KnowledgeSync, your HR team will have more knowledge about the business. You can quickly realize a return on your investment in Sage KnowledgeSync because you will spend much less time asking for, producing, and reviewing information. You automatically get only what you need to make the appropriate decisions. Give us a call with your questions. ✨

# Sage Abra Tips And Tricks

## Set Up Audit Trail In Sage Abra

An audit trail provides a record of users of your Sage Abra system. It is an extremely useful tool for safeguarding Sage Abra data integrity. You can use the audit trail capabilities in the software to be aware of who is making changes in the system and to measure users' performance. You can determine the number of changes users make and how often corrections are being made. It also keeps track of date, time, and the user who made the change.

**Note:** Audit trail records must be purged periodically to prevent a negative affect on system performance. Call us if you need assistance.

When setting up the Audit Trail, you can select which database files and fields need to be audited. For information about the database files and fields, you can refer to the data dictionaries in the individual product manuals, or give us a call for assistance.

To activate the Audit Trail:

1. From the menu bar, select Rules, System, and then Enterprise Setup.
2. Select the Audit Trail Setup tab.
3. Verify that the option to Enable Auditing is set to *Yes*.
4. From the Select File to Audit drop-down list box select the file to audit.
5. Check the box next to Enable File Audit.
6. 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.

You can monitor audit trail results using three standard reports. To access them, from the menu bar select Reports/System/Audit Trail Reports. You can review audit information by User, by Date, or by File/Field in the database. We also can help you create custom audit reports using Crystal Reports. Give us a call for assistance. ✨

## How To Set Up An Employer In The Attendance Option

1. From the menu bar, select Rules/Attendance/Attendance Setup. If there is more than one company, the Employer Selection dialog box will open.
2. Double-click the Employer to open the Attendance Setup dialog box.
3. For all plans based on the fiscal year, enter the Fiscal Year Start date. Abra Attendance performs year-end carryover calculations for each employee. For example, if the system is set to perform carryover calculations on June 30 each year, set the Fiscal Year Start to July 1.

**Note:** If the plan is based on an annual or anniversary year, then the Fiscal Year Start does not have to be entered.

4. Choose the type of Absence Units, either Hours or Days, that you want the Abra Attendance option to use to accrue time. The Absence Transaction should be in the same type of unit.
5. Select from zero to five decimals places for the Absence Units.
6. If you want Abra Payroll to update absence transactions for employees' time sheets, check Receive Payroll Time Sheets. This means that during a final payroll when a timesheet earning is paid, the system creates an Absence Transaction in Abra Attendance. The timesheet earning must be linked to an absence reason code and the earnings category must be correct: *V* for vacation, *S* for illness, or *W* for personal.

Additionally, if you want Abra Payroll to update attendance accrual but the employer's leave plan accrual rates are based on hours worked or pay period, follow these procedures:

1. Make sure *Link Payroll to Attendance for Accruals* is checked on the Attendance Plan Setup panel. If you do not check it, only the leave plans in Abra Payroll that are **not** set up as attendance plan rates will accrue, and they will accrue only for Abra Payroll.
2. For the attendance plans that are being set up, set all seniority levels to zero.
3. In Abra Payroll, select the Payroll rule, Payroll Setup, and the Employer. Set each appropriate leave type to per hours worked or per pay period.

**Note:** An employee may have more than one vacation, personal, or illness plan. For example, an employee has two illness plans: Illness-excused and Illness-unexcused. When the system updates accruals, it only updates the first plan it encounters. In this example, it would update only Illness-excused because that plan is listed alphabetically before Illness-unexcused.

4. Click *OK* when the setup is completed.

**Note:** Instructions in these tips start from the menu bar to make them applicable across versions. You have other options for navigation depending on your version.

Please give us a call if you need assistance, or if you have any questions. ✨

## IN THE SPOTLIGHT: The Family And Medical Leave Act

When does an employee qualify for the Family and Medical Leave Act (FMLA)? What rights does the employer have? In this article we cover these issues and the importance of good record keeping as proof of compliance.

### Who Qualifies For FMLA?

An employee must have been employed for 12 months to qualify for FMLA, but those 12 months no longer need to be consecutive. Any prior employment up to seven years in the past needs to be considered in determining eligibility.

Illnesses qualify for FMLA if there is an incapacity of more than three full consecutive days with two visits to a healthcare provider within 30 days of the beginning of the incapacity, with the first visit within seven days of the first day of the event.

Employers have five days to request medical certification and may request recertification every 30 days. However, contact with the employee's healthcare professional should **not** be performed by the employee's immediate supervisor. Preferably, contact is made by an HR professional. Do not ask for diagnostic information; instead, describe the employee's work responsibilities, and ask how this illness is going to affect the employee's job performance; how often the employee will be absent; and what kinds of accommodations may need to be made. If there are safety concerns, fitness for duty (FFD) certification can be job specific, and may be required before an employee returns to work.

If there is any question about the validity

of the illness, you may get a second opinion. Payment for the second opinion is the responsibility of the employer.

The national defense spending bill of 2006 provides for an additional 12 weeks of FMLA for the next of kin to use to provide care for injured military service personnel.

### How To Protect Your Organization

Clear, well written policies are essential to minimizing the impact of FMLA on your organization. A good place to start is with thorough job descriptions that clearly define the physical and mental requirements of a position. Create a comprehensive certification form, and put a policy in place and have a healthcare professional available (but not on your payroll) for second or third opinions. Ask for recertification every 30 days, and attach a letter, along with the worker's attendance record, asking the healthcare professional whether or not the worker's condition is incapacitating enough to warrant the days of absence. Do not be afraid to contact an employee who is out on FMLA. Statistics show that the longer employees stay out, the less likely they are to return. It is okay to let them know you miss them.

To minimize the cost of FMLA, have a written policy that requires employees to use other types of leave such as vacation and sick time before FMLA leave kicks in.

### The Importance Of Training

Make sure all your supervisors understand your FMLA policy and the actions they need

to take. Make sure managers know they can discipline behavior, but never the cause. For example, you can discipline an employee for being absent every Friday and Monday, not for being sick.

Sage Abra can help your company manage federal and state leave laws with advanced tracking in employee records, and standard and customized reporting. Please give us a call for assistance. ✨

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