DSD Business Systems

Sage 100 Enhancements

GLCR

Criterion Integration to Sage 100 General Ledger

Version 7.40

Information in this document is subject to change without notice.

GLCR Criterion Integration User's Manual
Version 7.40

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: **http://www.dsdinc.com**

The Enhancement page contains:

> *Current Release Schedule*
> *Purchasing Information*
> *Installation Instructions*
> *Product Support*
> *Enhancement Links*

PRCR Criterion Integration:

http://www.dsdinc.com/enh/pages/EEEE.htm

The product web page contains:

> *Product Description*
> *Web Links*
> *Current Product Version Table*
> *Product Installation File Download*
> *Product Manual in .pdf Format*
> *Revision History*
> *FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

> *Error number.*
> *Program name.*
> *Line number.*
> *Program version.*

Exact sequence that caused the error, including menus and menu selections.
Other pertinent information.

If leaving a message or faxing, please include:

Your name.
Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system remotely or by some other to duplicate the system.

PRCR Criterion Integration Features

This DSD enhancement allows an integration between Sage 100 and Criterion, using a REST API protocol. General Ledger Journal Entries are imported into Sage 100 from GL Entries created in Criterion from Payroll batches.

A new 'Criterion Import to GJ Entry' menu item has been added to General Ledger that allows for download of Payroll / General Ledger Entries from Criterion into Sage 100 General Journal Entry. A Log File is created that shows what data was imported.

For more information on Criterion, please visit: https://www.criterionhcm.com/

Section B: Getting Started

CAUTION

- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
G/L	Y	7.40

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. *Run Enhancement Setup Program:* Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. *Send your Sage Serial Number to your DSD Representative:* Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. *Unlock the Enhancement:* DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*
   Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.
   After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.
   File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file.*

- *The Sage 100 system that is being used must have web access for this option to be effective.*
- *You can send your Sage Serial Number to your DSD Enhancements sales representative.*

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

*Note: You can also unlock a DSD Enhancement through the **DSD Enhancement Control Panel** found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.*

7. **Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.*
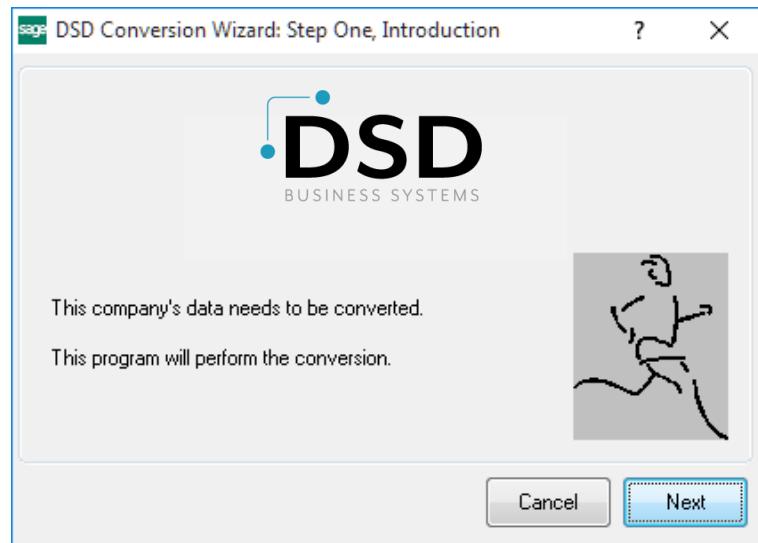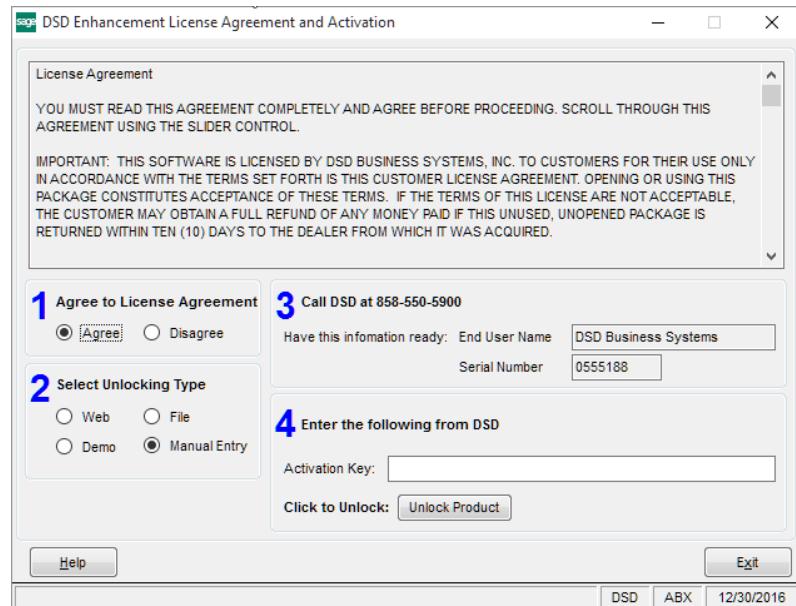
DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu**.

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement's data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.
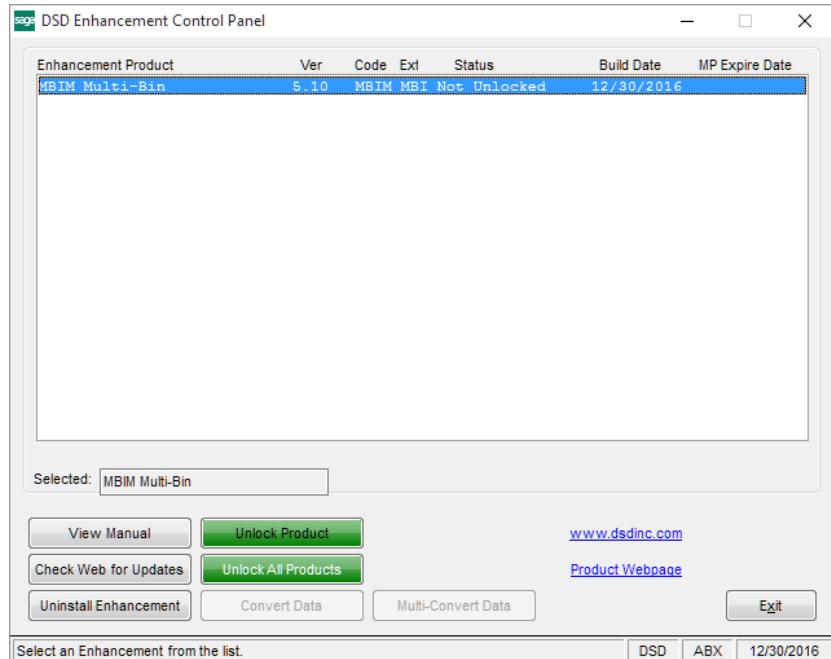
Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. (*If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.*)
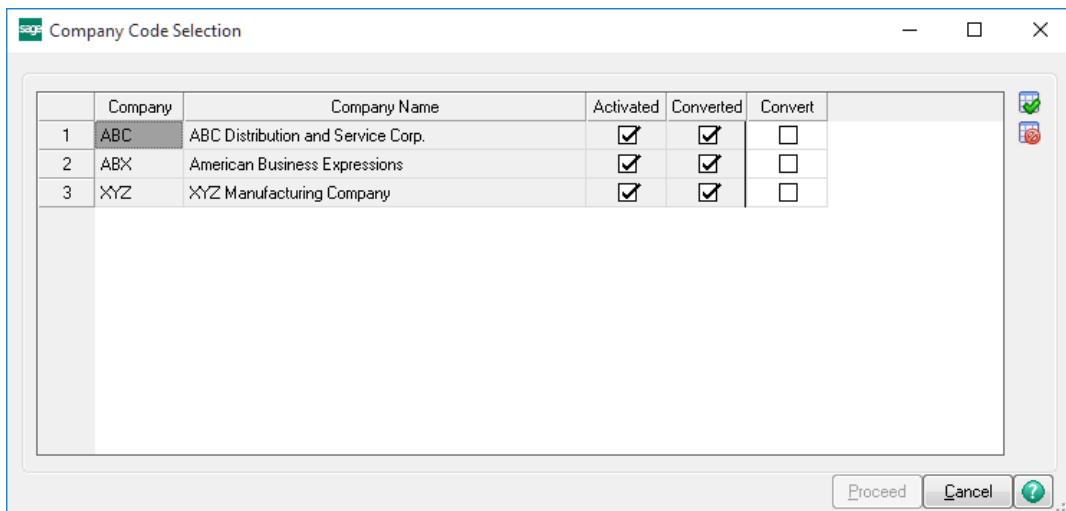
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see Uninstall DSD Enhancements)

Section C: Setup

Criterion Setup

Before enabling the integration, ensure that all **General Ledger accounts** required for payroll mapping are properly created and assigned in Criterion. Incorrect or incomplete GL mapping may prevent Sage 100 from accepting imported payroll activity.

It is recommended to review the following in Criterion prior to setup:

- Verify earnings, deductions, taxes, and employer contributions have correct GL account assignments.

- Confirm the Tenant ID and Employer ID for your environment.

- Ensure the user account that will be used for the API connection has the correct permissions to access payroll and employee data.

- The General Ledger File Format must be set to 'Standard GL Layout' in Criterion's "Payroll / Settings / System Configuration / General Ledger" settings page.

Sage 100 Setup

A new menu option, G/L Criterion Link Options, has been added to the General Ledger Setup menu. These options control how Sage 100 connects to Criterion and processes incoming data.
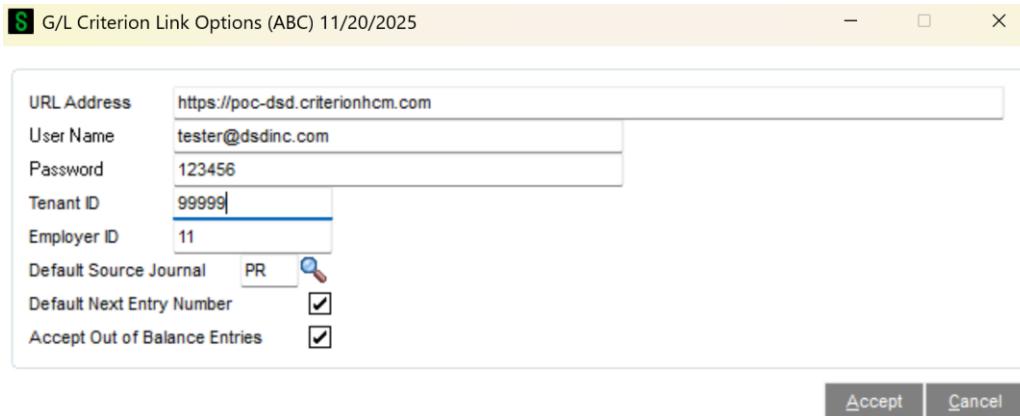
Below is an explanation of each setting:

URL Address: Enter the full API URL used to connect Sage 100 to Criterion.
This should be provided by Criterion and typically includes your tenant environment.
Example format: https://api.criterionhcm.com/tenant/...

User Name; Enter the Criterion user name authorized for API access.
This credential is used each time Sage 100 retrieves payroll data from Criterion.

Password; Enter the password for the Criterion user.
Passwords must match exact case and characters. If the password is changed in Criterion, it must be updated here as well.

Tenant ID; Enter the unique Tenant ID assigned to your organization by Criterion.
This ensures Sage 100 connects to the correct data environment.
If unsure, contact Criterion support or reference your system administration dashboard.

Employer ID; Enter the Employer ID for the entity whose payroll you will import.
This can be located in the URL when opening the Employer record inside Criterion's "Payroll / Settings / System Configuration / Employers" settings page.
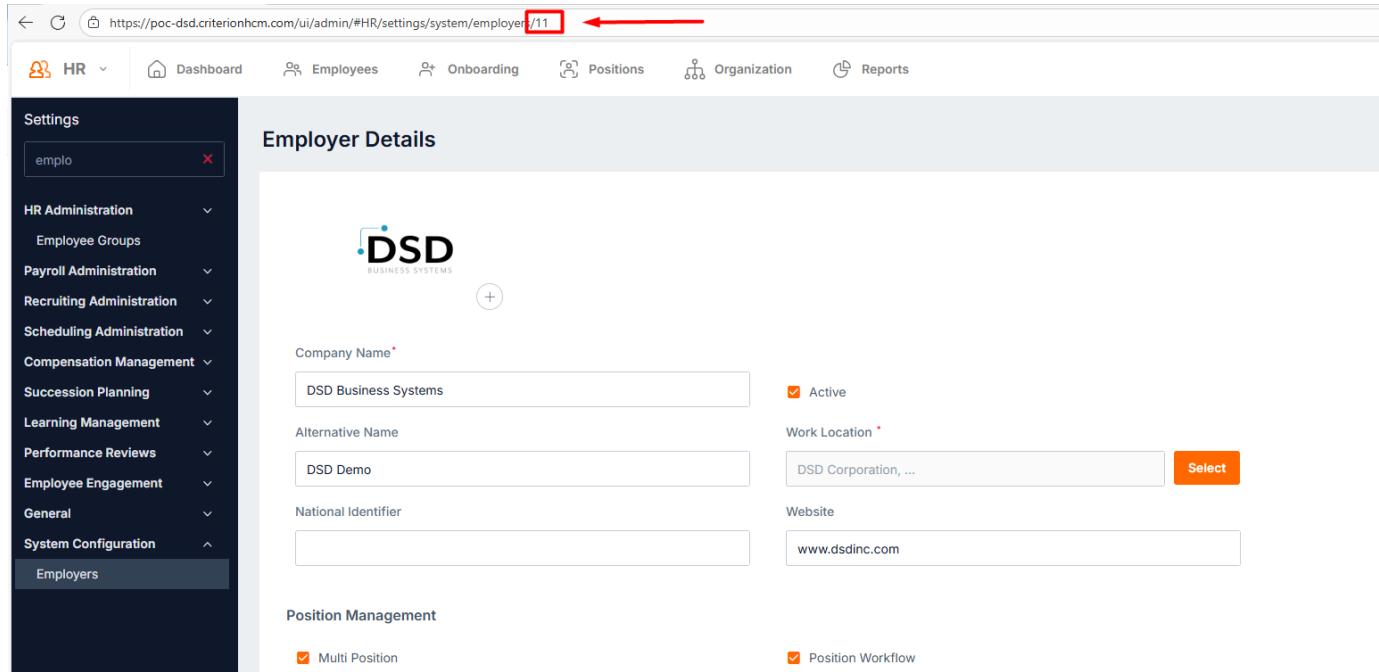
Default Source Journal; Specify the Source Journal Code Sage 100 should use when creating GL entries from imported payroll data.
Most companies use:
PJ – Payroll Journal
GJ – General Journal
This field can still be overridden during each import.

Default Next Entry Number; Check this option to have Sage 100 automatically assign the next available Entry Number for each import.
If unchecked, the user must manually enter an entry number at import time.

Accept Out of Balance Entries; Check this box only if you want Sage 100 to accept an imported entry even when debits and credits do not balance. Best Practice: Leave this unchecked to reduce posting errors and maintain GL accuracy. This option is typically used only for diagnostic or special-case scenarios.

Section D: System Operations

Criterion Download of GJ Entry

This utility can be accessed from the General Ledger / Utilties menu.
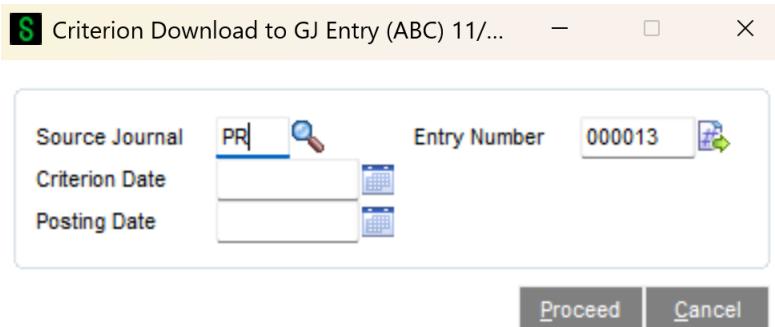
Use this screen to import payroll GL data from Criterion into Sage 100. Each field below controls how Sage 100 processes the incoming entry.

Source Journal: Displays the default journal from setup.
You may change it here if needed for a particular payroll import (for example, if importing adjustments into a separate journal code).

Entry Number: If "Default Next Entry Number" is enabled in setup, this field populates automatically.Otherwise, you must enter an entry number manually before proceeding.

Criterion Date: Enter the Criterion payroll date associated with the payroll batch you wish to import.This date must match the payroll run date in Criterion to ensure the correct dataset is retrieved.

Posting Date: Enter the GL posting date for the journal entry.This is typically the check date or the pay period end date, depending on your accounting practices.

Log Files

After running the import, a Log File will be displayed that shows the infromation that was downloaded in that import. Note that these Log Files are stores in the mas90\CriterionLogs directory.

Compare the Log File to the GJ Entry to verify that entry is correct and balanced.

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.
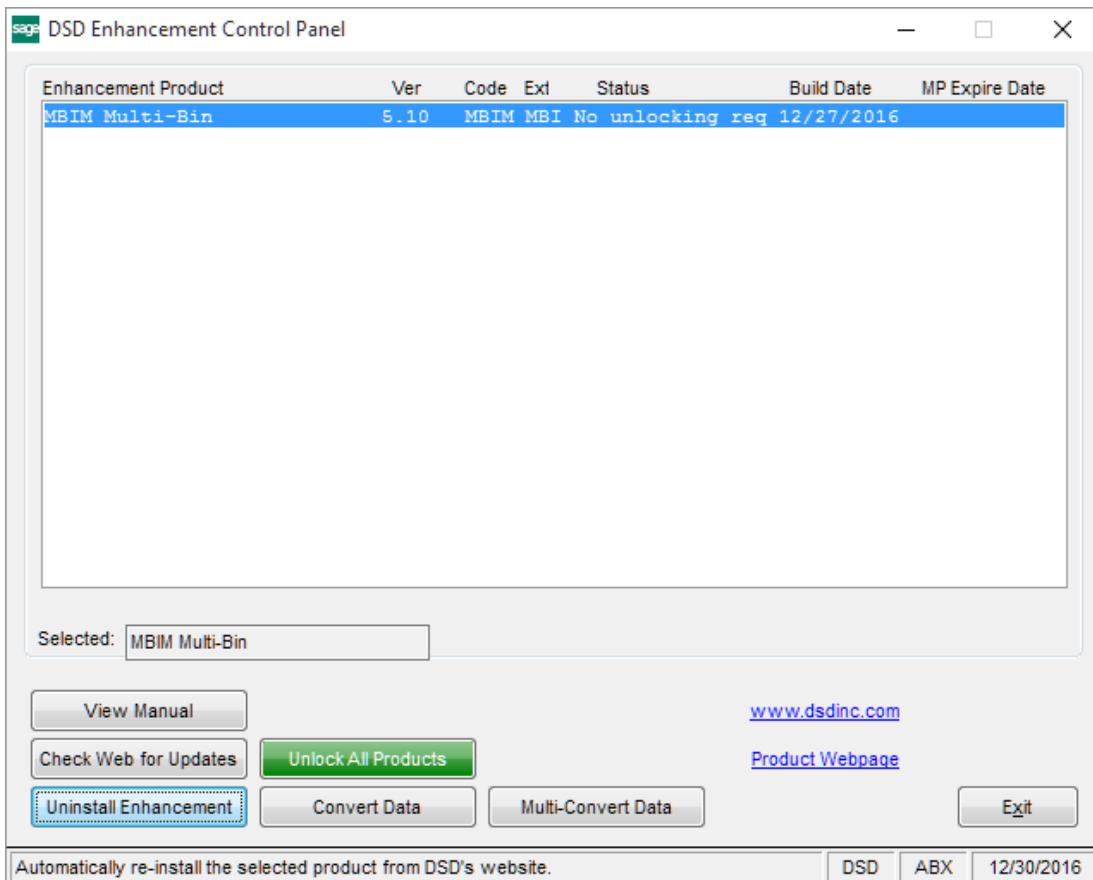

When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:
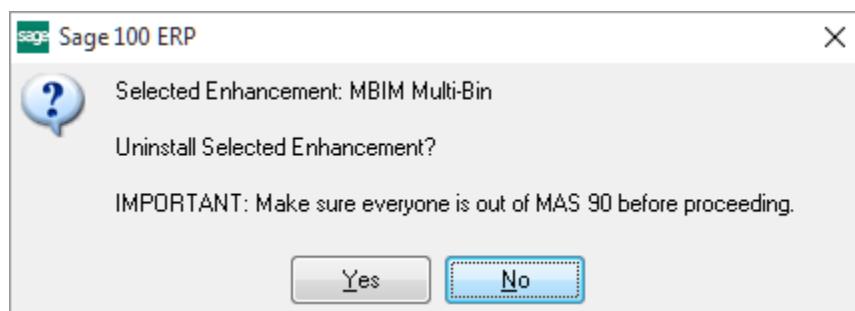
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.
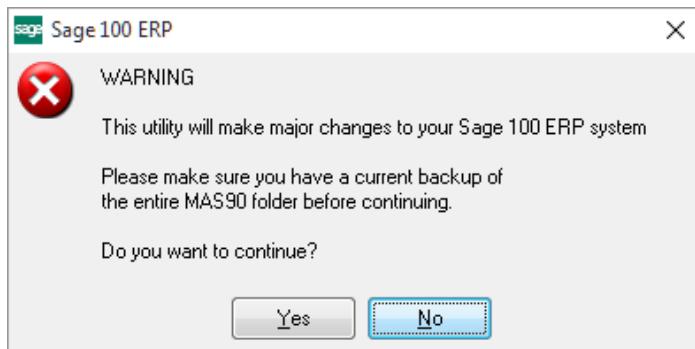
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, displaying the final warning message.
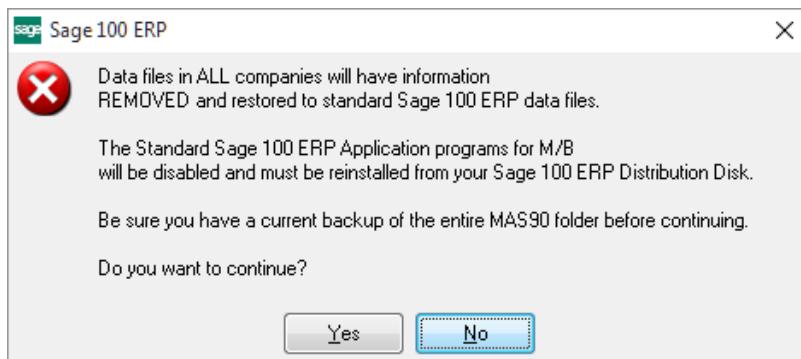
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

After completion of the Uninstall, the following message box will appear. Select OK to continue.

Sage 100 ERP
Enhancement uninstall complete.
OK

Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).