



DSD Business Systems

Sage 100 Enhancements

PRCR

Criterion Integration to Sage 100 Payroll

Version 6.20



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PRCR Criterion Integration User's Manual
Version 6.20

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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 and integration between Sage 100 and Criterion, using a REST API protocol. Employee Constant Data and Address Information is **synchronized** from Criterion to Sage 100. There are three ways to synchronize this data:

1. A 'Criterion' button has been added to the Main Tab in Employee Maintenance. By selecting this button, the system will connect to Criterion and search for the employee by Social Security Number.
2. A new 'Criterion Employee Synchronization' utility has been added to the Payroll Utilities Menu. The utility allows selection of an employee range to synchronize.
3. The Payroll Tax Calculation has been enhanced to prompt the user to synchronize the employees that are in the current check entry batch.

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 |
|-----------------|-----------------|---------------------|
| P/R | Y | 6.20 / Payroll 2.xx |

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.

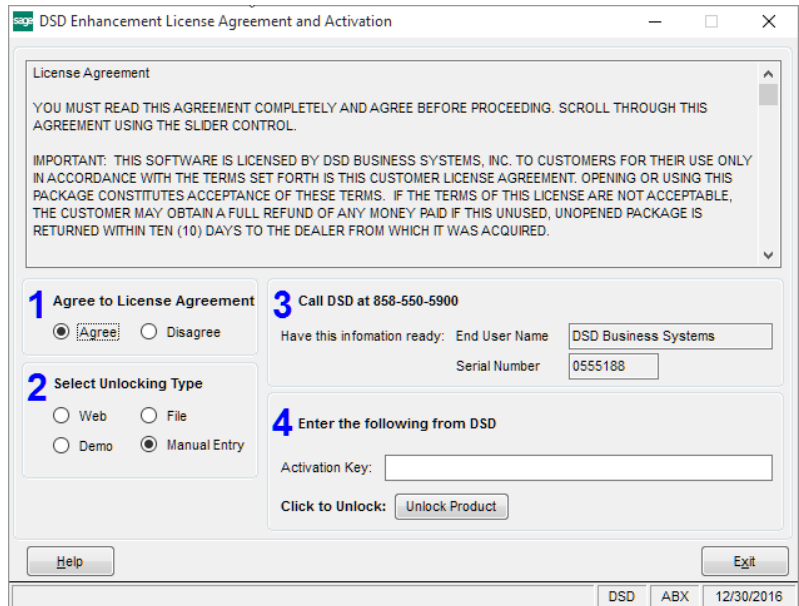
Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download

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.

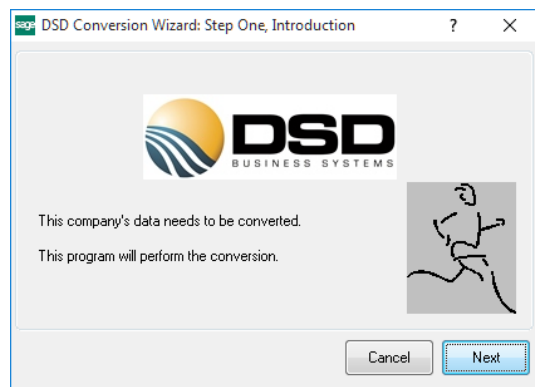
- Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.



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.

- 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.

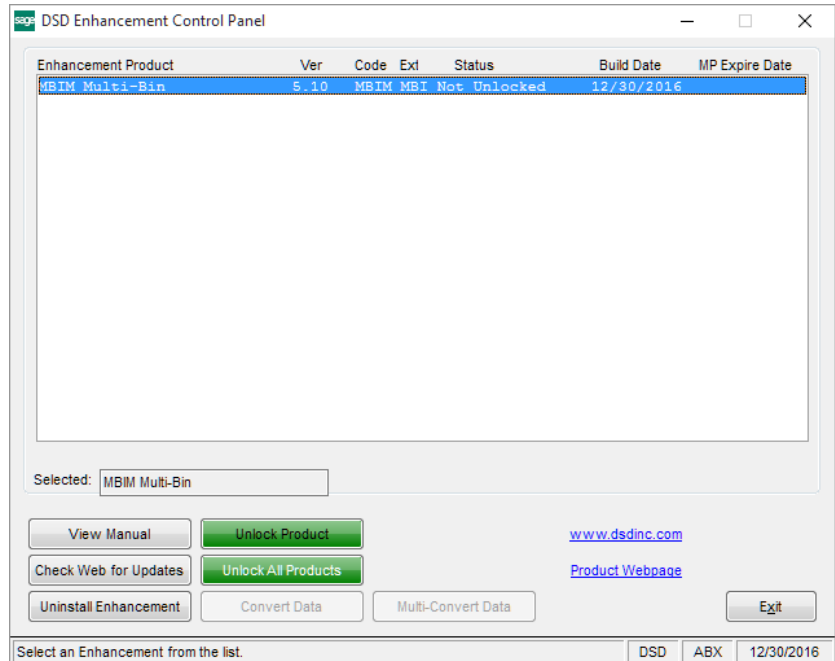
Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

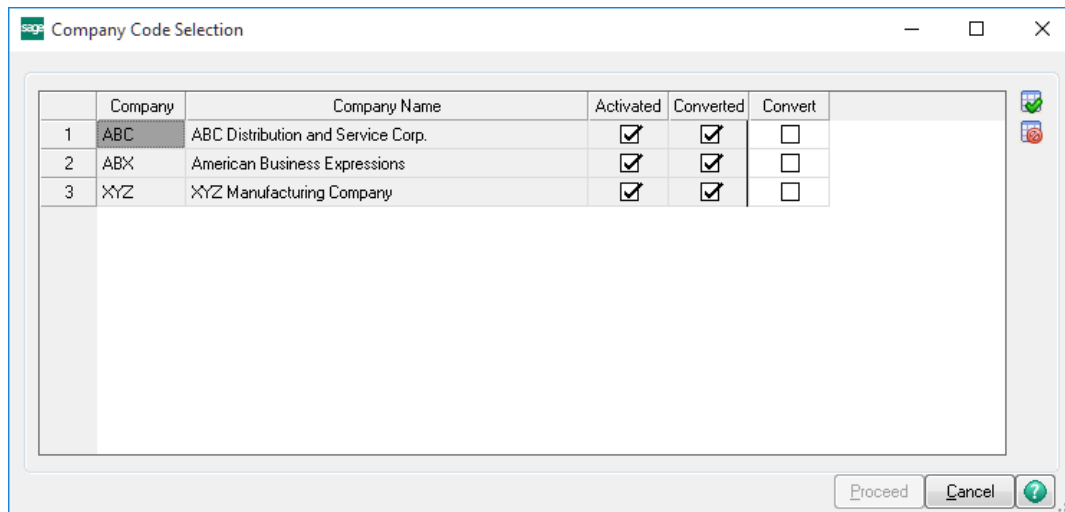
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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](#))

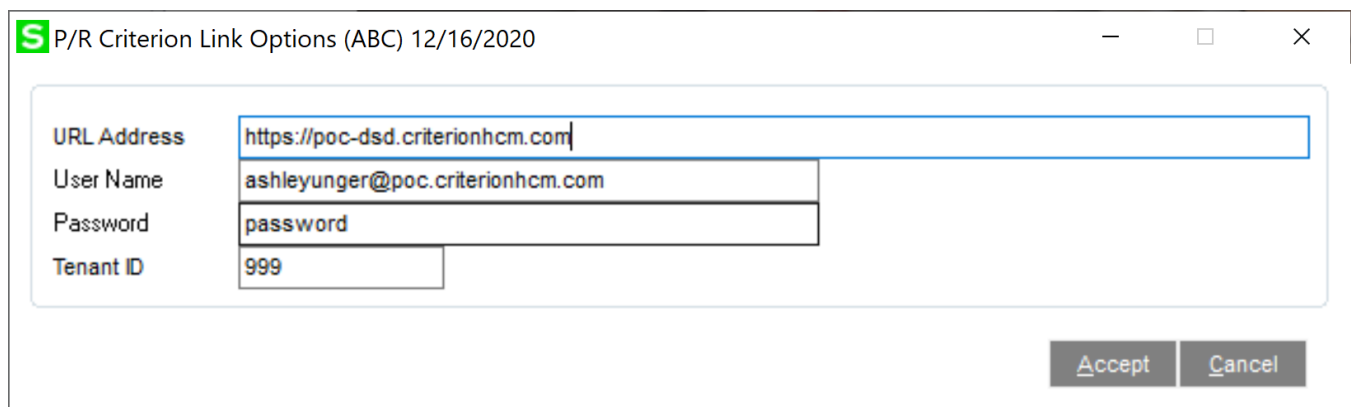
Section C: Setup

Criterion Setup

There is no setup needed on the Criterion portal to integrate with Sage 100. All of the Setup for this enhancement is in Sage 100.

Sage 100 Setup

P/R Criterion Link Options has been added to the P/R Setup Menu. Select this new menu option to access the Criterion integration settings.



| | |
|-------------|----------------------------------|
| URL Address | https://poc-dsd.criterionhcm.com |
| User Name | ashleyunger@poc.criterionhcm.com |
| Password | password |
| Tenant ID | 999 |

Accept Cancel

URL Address: Enter the URL address for Criterion.

User Name: Enter the Criterion User Name. This name is used to login to Criterion from Sage 100 to download information.

Password: Enter the Criterion Password for the User Name. Be sure to match the case sensitivity.

Tenant ID: Enter the Tenant ID for your Criterion tenant. You may obtain this information from Criterion.

Section D: System Operations

Employee Maintenance

A new 'Criterion' button has been added to the Main Tab of Employee Maintenance, to the right of the employee address, and is enabled when a Social Security Number is present/entered for an existing or new employee.

The screenshot shows the 'Employee Maintenance' window for employee ABC, dated 12/28/2020. The employee's ID is 11-0000100. The form includes fields for Last Name (THOMAS), First Name (JERRY A.), Middle Name (Christian), and Suffix. The mailing address is 4121 W. 35th Street, Apartment 201, ZIP Code 53151, City MILWAUKEE, State WI. A 'Criterion' button is located to the right of the address field. Other fields include Social Security No. (123-45-6789), Birth Date (12/25/1986), and a Direct Deposit checkbox. The 'Status Change' table shows a hire on 1/15/2019 with the comment 'Transfer From Central Warehouse'. At the bottom, there are 'Accept', 'Cancel', and 'Delete' buttons.

New Employees

For new employees added to Sage 100, you must enter (1) The Employee Number, and (2) The Social Security Number. Once these two fields are entered, the Criterion button is enabled. Selecting this button will initiate the connection to the Criterion portal, and will search for any employee that has a matching Social Security Number. If found, the following Criterion fields will be updated to Sage 100:

- Employee First Name
- Employee Middle Name
- Employee Last Name
- Employee Address

- Home Phone
- Mobile Phone
- Email Address
- Date of Birth
- Gender
- Marital Status
- Ethnicity
- Military Status

Additionally, a new “CriterionID_234” field in the Sage 100 Employee Master file will be updated with the Criterion ID.

Once the fields are updated, the Employee Maintenance panel will be refreshed to display the changed fields.

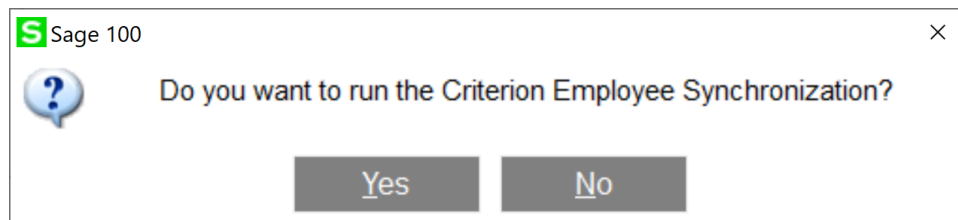
Existing Employees

Existing Employees may also be synchronized, as long as the Social Security Number is assigned for the Sage 100 employee. The Criterion button will be enabled if this is the case.

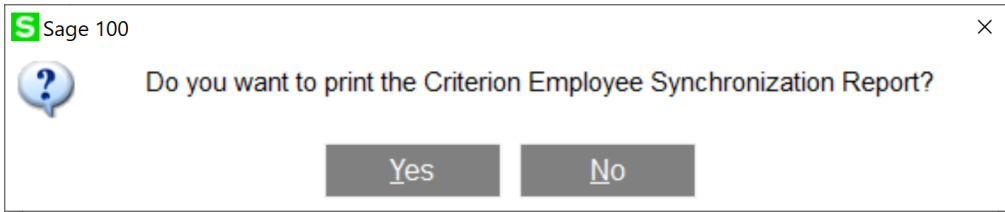
NOTE: Once the Sage 100 employee is synchronized with Criterion, the synchronized fields will be **disabled** on the Employee Maintenance panel. If the user wants to change these fields they must be changed in Criterion, and then synchronized in Sage 100 by selecting the Criterion Button in Employee Maintenance.

Payroll Tax Calculation

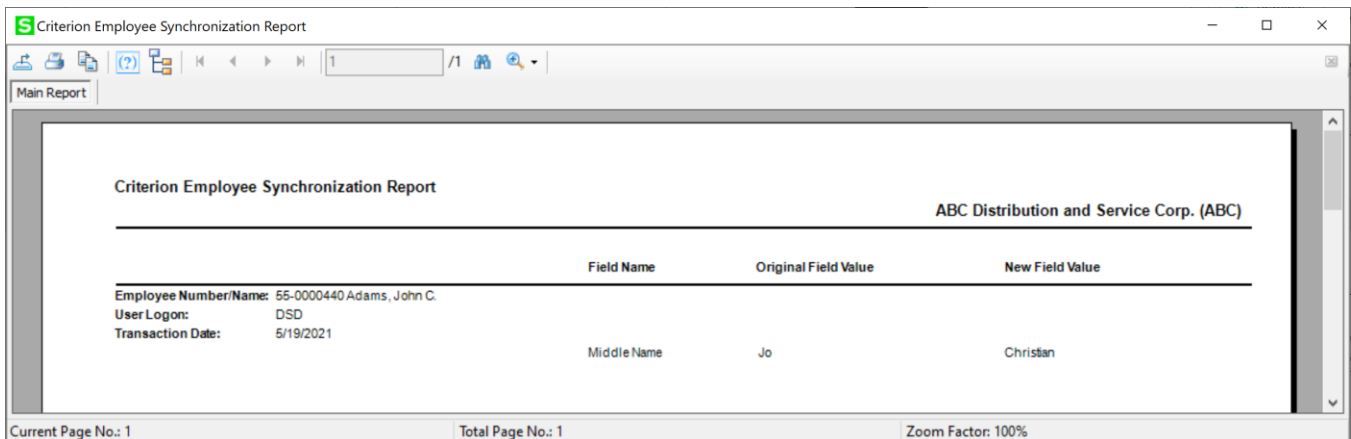
The Payroll Tax Calculation will determine if there are any Sage 100 employees in the Payroll Check run that are integrated with Criterion. If so, the user will be prompted after the Payroll Tax Calculation completes:



If the “Yes” button is selected, then all Sage 100 employees in the Payroll Check run that are integrated with Criterion will be scanned, and the Criterion portal will be read for any changes to these employees. If there are changes, then the employees will be updated. After the employees are updated, the user will be prompted to print the Criterion Employee Synchronization Report.

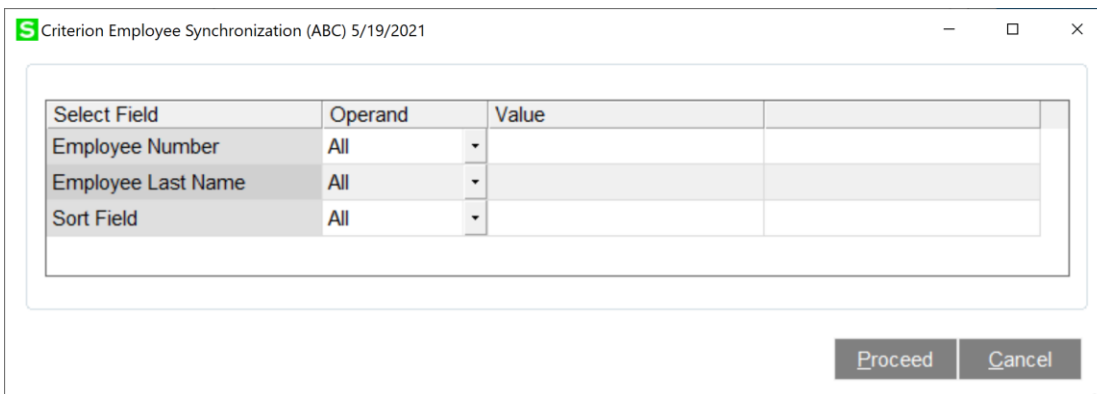


The Criterion Employee Synchronization Report is similar to the Payroll Employee Audit Report. It shows the fields that were changed by the Criterion Employee Synchronization process.



Criterion Employee Synchronization

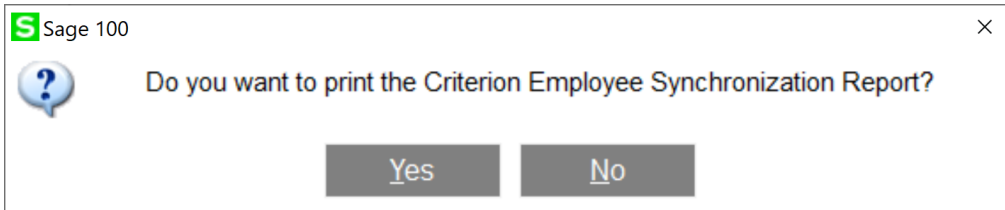
The **Criterion Employee Synchronization** utility has been also been added to the P/R Utilities Menu.



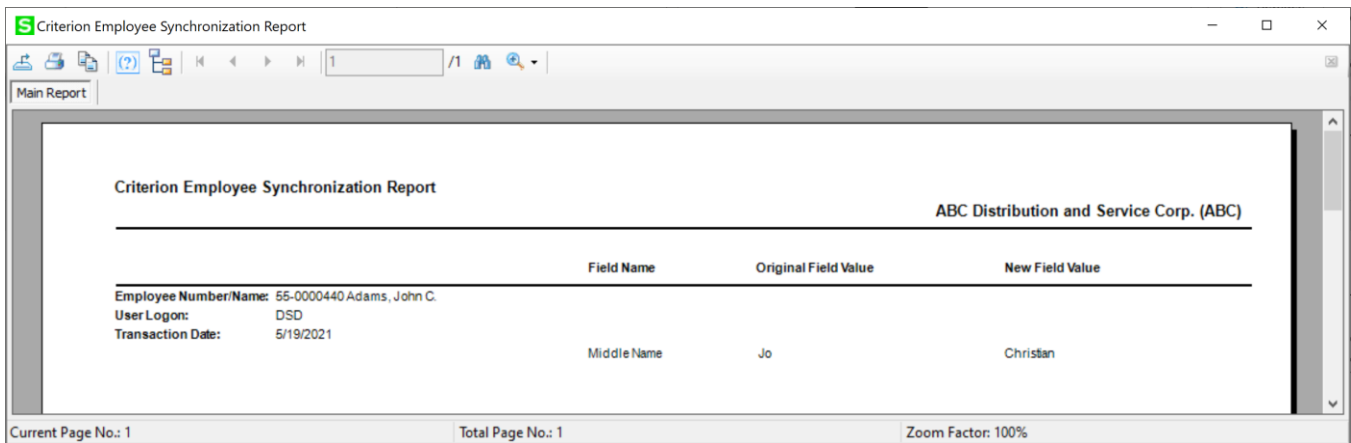
- Employee Number:** Enter the Employee Number range for the scan to use.
- Employee Last Name:** Enter the Employee Last Name range for the scan to use.
- Employee Number:** Enter the Employee Sort Field range for the scan to use.

Select the **Proceed** Button to scan all Sage 100 Employees using this selection criteria. All employees that meet this criteria, that are already synchronized with Criterion, will be updated from the Criterion portal.

After the utility has updated the associated employees, the user will be prompted to print the Criterion Employee Synchronization Report.

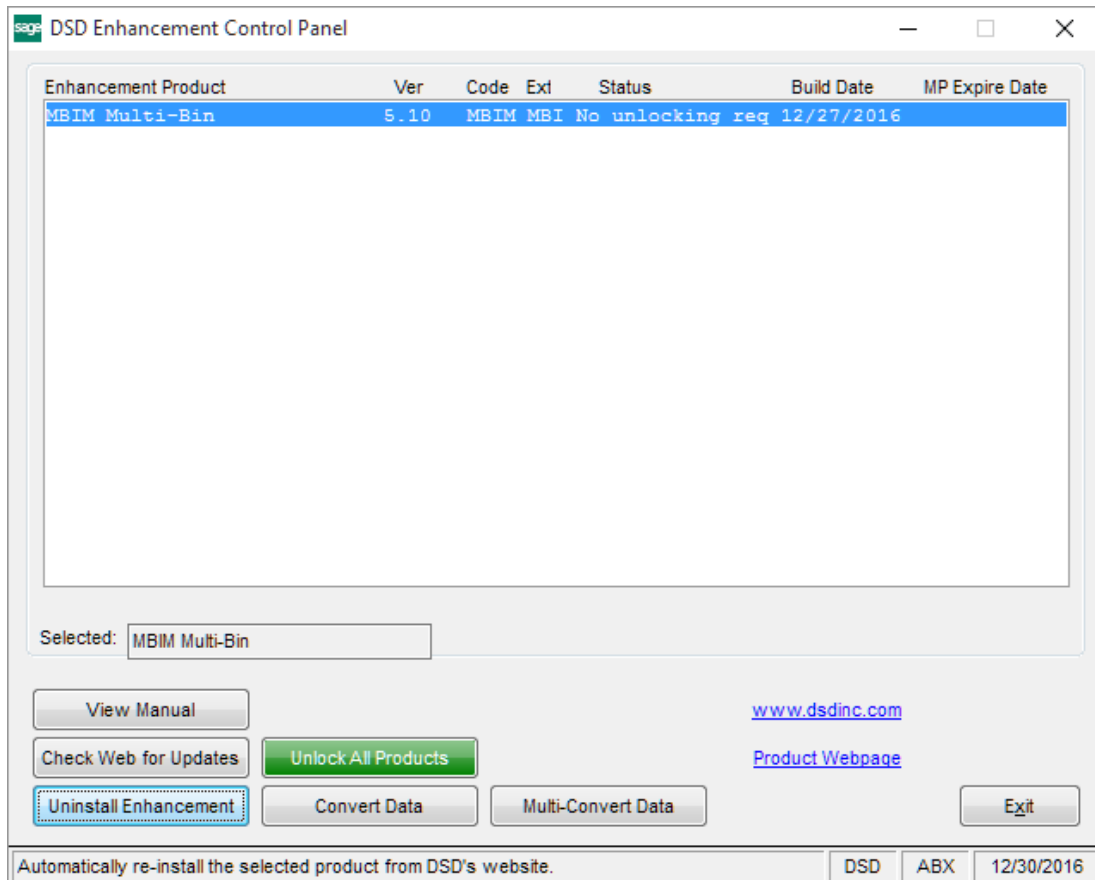


The Criterion Employee Synchronization Report is similar to the Payroll Employee Audit Report. It shows the fields that were changed by the Criterion Employee Synchronization process.

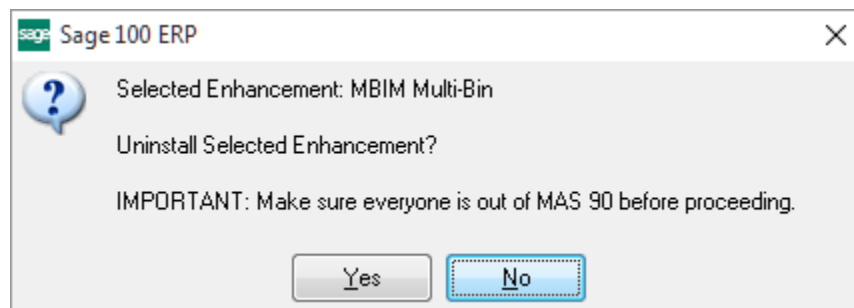


Section E: Uninstall DSD Enhancements

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.

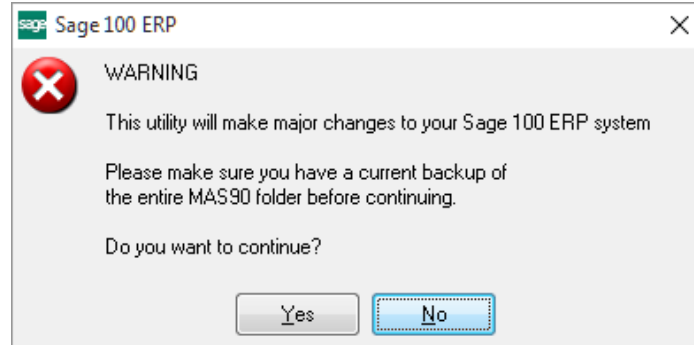


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



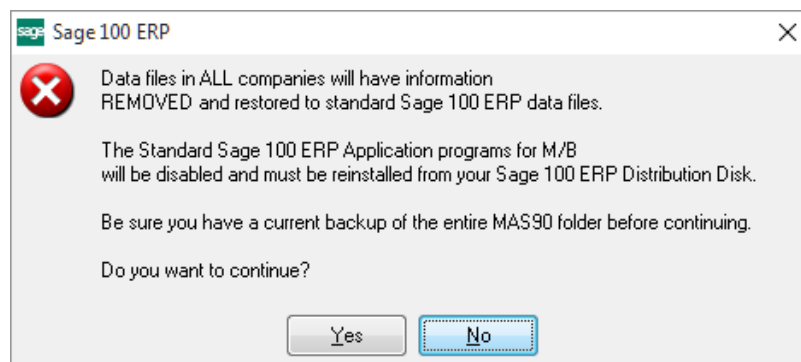
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

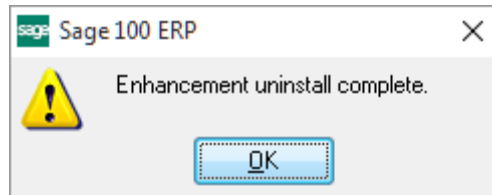
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.



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).