DSD Business Systems

Sage 100 Enhancements

Q062

Employee User Defined Fields
PR-1062

Version 5.40

Information in this document is subject to change without notice.

Employee User Defined Fields User's Manual
Version 5.40

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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*

1062 Employee User Defined Fields:

http://www.dsdinc.com/enh/pages/Q062.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.

Employee User Defined Fields Features

This DSD Extended Solution to the Payroll module adds up to 30 new User Definable Fields (UDFs) that can be entered and displayed in Payroll Employee Maintenance Address and Constant Data screen. The UDFs can also be printed on the Quarterly Government Report, W-2 Form and the Payroll Check Form. One UDF can be used as a sort option in Non-Graphical Payroll Check Printing. Each of the UDFs can be defined as one of the following data types:

- String (with up to 60 characters)
- Uppercase String (with up to 60 characters)
- Yes or No Flag
- Numeric (up to 10 digits with mask control)
- Date

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	5.40

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.*

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.
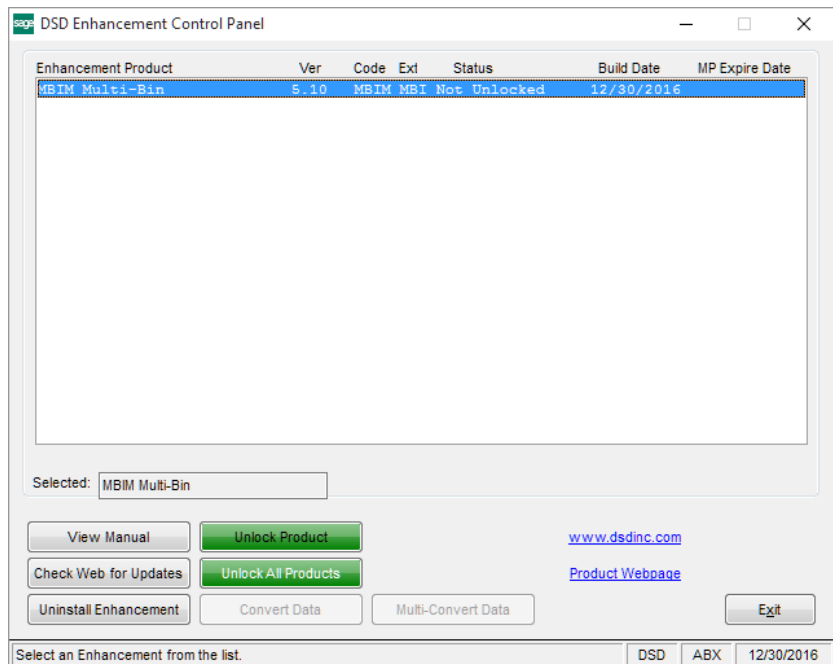
Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. (*If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.*)
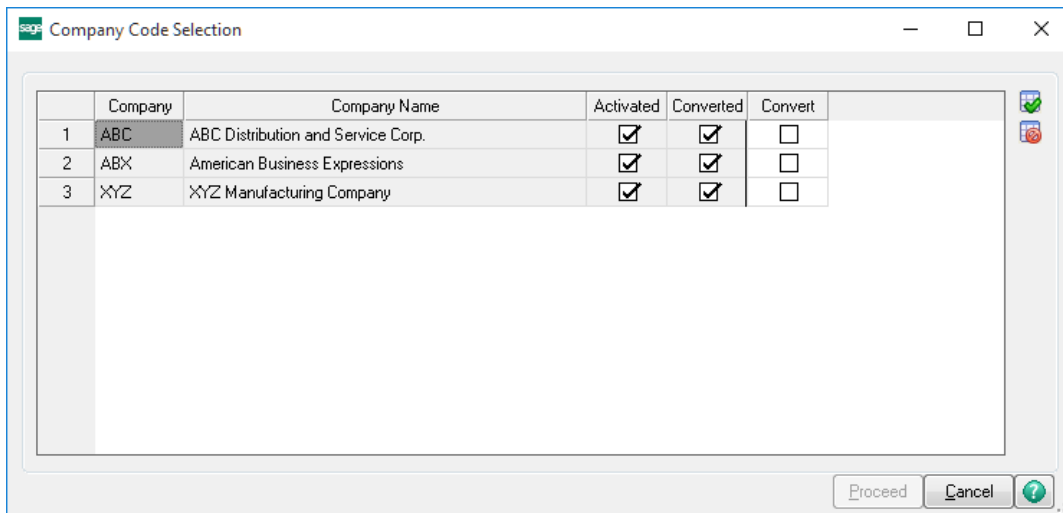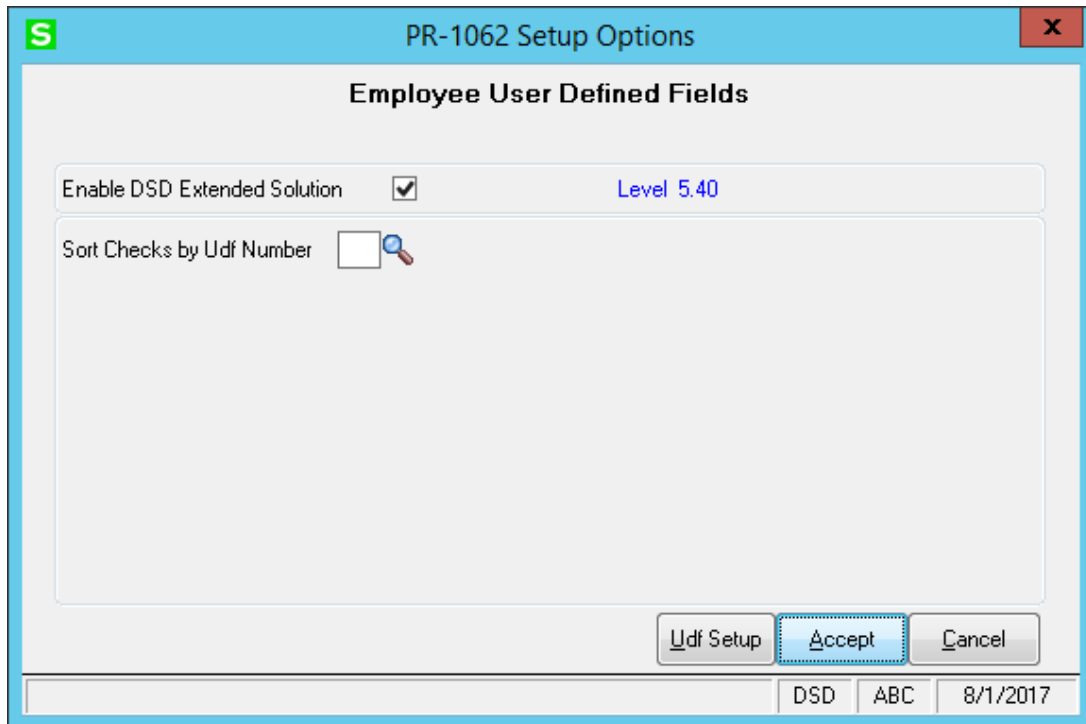

Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup from the Payroll Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.

Answer the following prompt:

Sort Checks by UDF Number: Enter one UDF Number by which to sort in Check Printing, **for Non-graphical check printing only**. Please see the Operations section below for further information.

The remaining Setup prompts will allow you to tailor this Extended Solution to your specific needs. Click the 'UDF Setup' button and you will be presented with a pop-up window.

Field Title: You can assign a title of up to 15 characters. Leave this prompt blank if you do not want to use a title.

Type: Select Uppercase string or String field (both uppercase string and string can contain up to 60 characters), or select a Yes or No flag, a numeric field, or a Sage 100-style date field.

Mask or Length: If you chose a Numeric field, enter the 10-character mask. If you chose an Uppercase or String field, enter the length of the field (up to 60 characters). Yes or No flag Field types and Sage 100-style date field types have internally fixed lengths and nothing will be entered here.

There is a 'rule' regarding field length for String or Uppercase String fields: the length of each field is fixed internally at 10 characters. Although the string length described above can contain up to 60 characters, if you use more than the internally fixed 10-character length, Setup will automatically assign the next field's data space to store the extra characters. The last field number that can be a full 60 characters is Field 25. An Example:

If Field 1 is defined as 57 characters, Fields 2, 3, 4, 5, and 6 will not be available. The next available field will be number 7.

Entry Required: If you check this box, the field cannot be left blank. Leave it blank if you want to allow blank fields.

Note: For fields Setup as type 'Y,' the prompts for Validate Entry, Entry Req and Add During Entry will be disabled.

Validate Entry: Check this box to require that an entry must already be contained in the Validation File for the specific UDF number. See Validation Field Maintenance below for more information regarding the Validation File.

Add During Entry: Check this box if you want to add new validation entries wherever UDF Field Maintenance is available. Leave it blank if you wish to only allow validation through the Validation Field Maintenance program (see Validation Maintenance below).

Be careful when requiring validation for a field. If you do not allow the creation of new validation values during data entry, you can create a 'lock-up' situation if you require validation for a field but you have not set up any valid values for the field in Validation Maintenance.

Display Line/Tab of UDF Title/Data: Enter the desired Line and Tab positions for the display of this field.

Title Color: Select a Title color for the UDF.

Password: Enter a password if you want this UDF to be password-protected.

Tab Stop: Specify the order you want to have this field presented when UDFs are entered.

Default Field Value: When creating a new item, the value entered here will be the field's initial value.

The Setup screen has a Preview option available allowing you to see a test pattern of the Maintenance screen. Click the 'Preview' button to preview your settings.

Employee UDF Validation Maintenance

If the Validation File Maintenance program has not been previously added to a menu, you will see a pop-up screen that will ask if you want the program automatically added to the Setup menu. Answer 'NO' if you want to use standard Sage 100 Menu Maintenance to add the program to a menu you choose.

After selecting Validation Field Maintenance from the menu, you will be prompted for the UDF number, validation field and description. Lookup and Print options are available. The data you enter here will be used later for validation and lookup purposes during Item Maintenance entry of the corresponding UDF. Note that due to screen width limitations, during a Lookup, the validation field description will be shortened to accommodate a field length of no more than 40 characters. Optionally, if you answered Yes to the 'Add During Entry' Setup question, you can validate entries wherever UDF Field Maintenance is available.

Be careful when requiring validation for a field. If the creation of new validation values during data entry is not allowed, a 'lock up' situation can occur when field validation is required but no valid values have been set up in Validation Maintenance for that field.

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Section D: System Operations

The new fields can be maintained by clicking the 'UDF' button on the Employee Maintenance Address and Constant Data screen.

All the new fields have been added to the Data Dictionary (see Data Dictionary below). Each of the PR-1062 UDFs have been added as form fields to the Payroll Check Form, the W2 form and the Quarterly Governmental Report form. See the FORMS section below.

A check box has been added to the **Non-Graphical** Payroll Check Printing selection screen for one of the UDFs, as specified in Setup. When this box is checked, the checks will print in ascending order of this UDF value. *This is not a selection option*; you cannot select to print only the checks for employees with a specific UDF value. The new option simply affects the order in which the selected checks print.

Non-Graphical

You can maintain the new form fields for this Extended Solution by clicking the 'Form...' button. A window will pop up where you can select the form you want to maintain (Standard Quarterly Governmental Report Form; Standard Payroll Check Form). W2s also allow for form printing. Select this Extended Solution and the FORM maintenance screen for the new fields will be displayed.
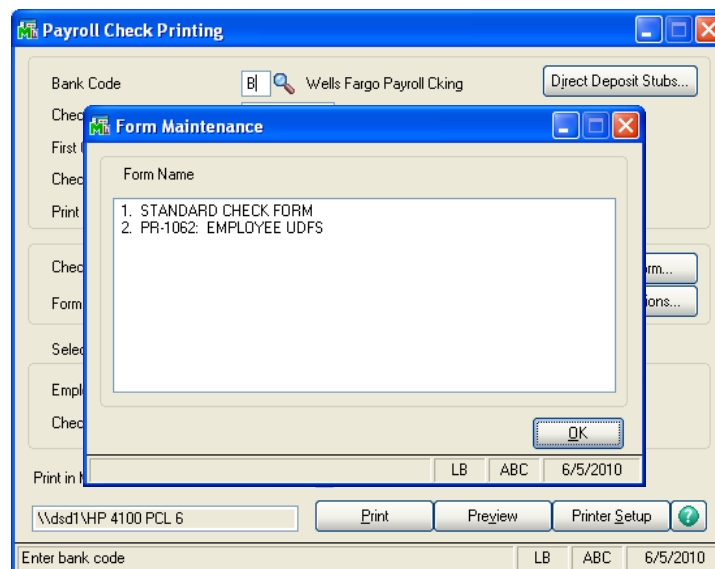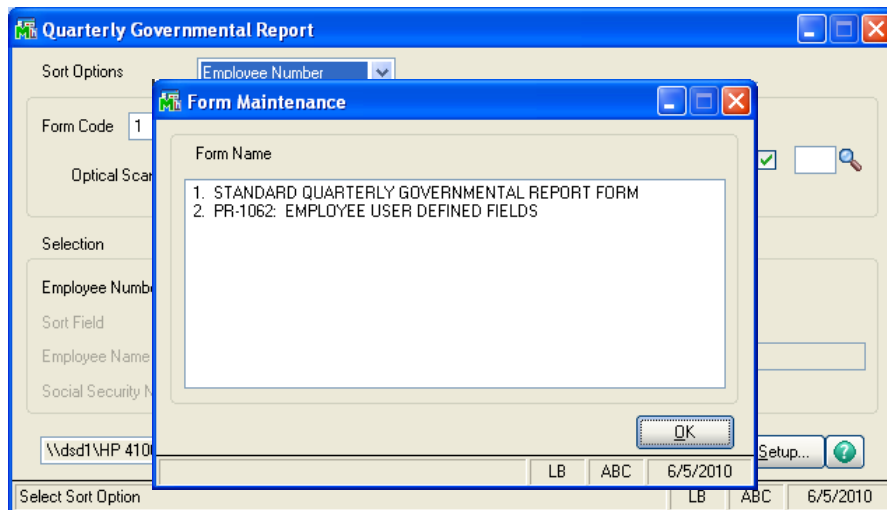
The new fields that you activate with this Extended Solution will print in addition to any other fields that have been activated in standard Sage 100 or other Sage Software Extended Solution FORM maintenance.

Graphical Forms

No changes have been made to the Crystal Reports Work Table files. If you have elected to use graphical forms in the modules' Setup, the features of this Extended Solution that affect form printing will not be available.

Visual Integrator

The files listed below have been added or changed in the Data Dictionary by this Extended Solution for Visual Integrator purposes.

New File:	*Field:*
PR.HDR_UDF	UDF_01_STRING…UDF_30_STRING
	UDF_01_DATE…UDF_30_DATE
	UDF_01_NUMBER…UDF_30_NUMBER
PR.UDF_VAL	All Fields

PR.EMPL and PR.EMPTAX are linked to PR.HDR_UDF

Note: UDF field names have changed in the GUI version. You will need to change manually any existing reports or imports to the new field name.

The Data Dictionary may contain other files and data fields that are not available without their corresponding Sage Software Extended Solutions installed.

Crystal Reports and the ODBC Dictionary

The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

| *File:*	*Description*	*Fields:*
PR_HF	Employee UDF Validation	All Fields
PR_HU	Employee UDF File	All Fields

Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

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.
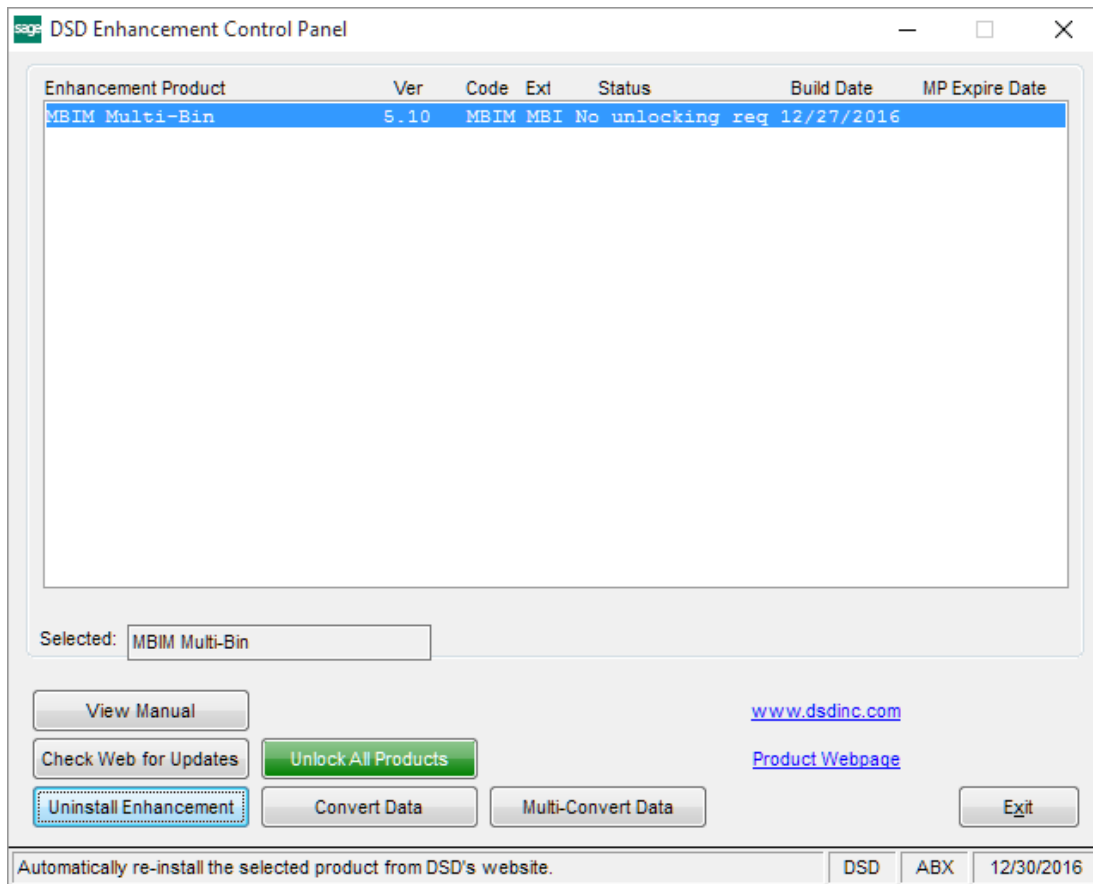

When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:
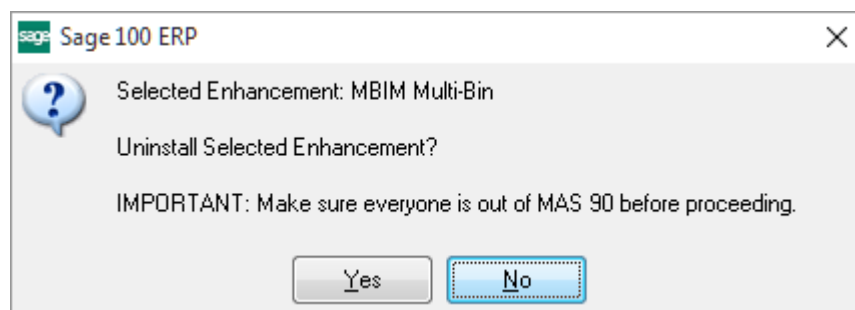
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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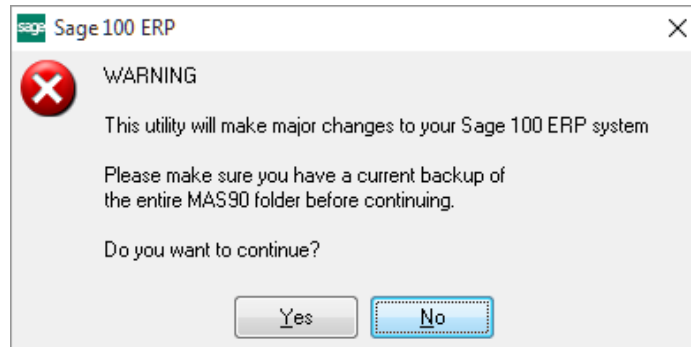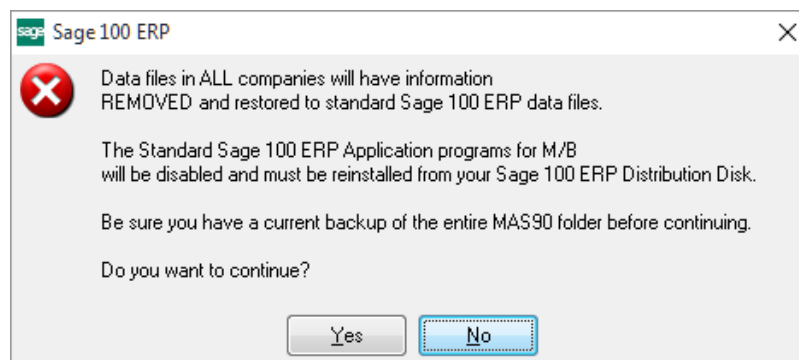
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.
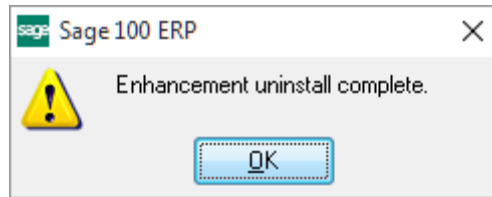
Now that the Uninstall process is completed, you must:

- 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).