Sage HRMS
Formerly known as Abra SQL

These are notes for a typical setup. For specific setup, please refer to the user manual. The user manual is available at
https://www.wellspringsoftware.com/Support/DynamicSupport/Directory.aspx . Select the Manuals folder in the left navigation pane.
The documents will display in the right pane. Choose 'PrintBoss Standard-Enterprise Manual' for this product.

Contents

1) General Information
2) Setup in Sage HRMS
3) PrintBoss Settings
4) Using PrintBoss with Sage HRMS

Section 1: General Information

PrintBoss is an application that adds flexibility and features to the task of printing multi-part accounting documents on Laser printers. In spite of their superior print quality and speed, laser printers have introduced some new challenges with printing accounting documents. PrintBoss solves these problems by offering the following features:

- PrintBoss can print multiple copies of any document.
- PrintBoss can enable unique printing for each copy, such as a legend.
- Each copy can be printed in a different order, or to a different printer, or from different trays within the same printer.
- PrintBoss can allow signatures to be printed on checks with security.
- PrintBoss can print text or graphics based on conditions of the document (e.g. document amount).
- Document design can be enhanced.

The PrintBoss application uses a special Windows Printer driver in order to interface with Sage HRMS. Once the appropriate settings are made in PrintBoss and Sage HRMS, sending a document to PrintBoss requires no extra steps for the user.

Section 2: Setup in Sage HRMS

LOAD THE CRYSTAL REPORTS
During the installation of PrintBoss
- Select Sage HRMS as the Host Accounting Package.
- Crystal reports for Payroll Checks are installed into the PrntBoss\Specs\SGHRMS* directory, where the asterisk is the version number.
- On the final "Setup Complete" screen, click on the "Start Install steps special for this host" to have PrintBoss copy these files into the appropriate Sage HRMS directories. ("C:\Program Files\Sage\Sage ACCPAC \UP57\eng" in Windows 7)
- If the "Start Install steps special for this host" button is NOT selected, the modified crystal reports will need to be manually copied into the appropriate Sage HRMS directories.
- Please note that the modified crystal reports are Sage HRMS version specific.
- Copying these modified crystal reports into the Sage HRMS directories will not overwrite any of the standard Sage reports. It only makes these reports available for use by Sage HRMS.

BANK SERVICES
Once a company is opened in Sage HRMS, select COMMON SERVICES / BANK SERVICES / BANKS.
- Select the correct bank account.
- Select the CHECK STOCKS tab.
- INSERT a new checks tock code for the PrintBoss check form.

FIELD	US Payroll checks	Canadian Payroll checks
CHECK STOCK CODE*	UP_PB	CP_PB
DESCRIPTION	UP PrintBoss	CP PrintBoss
STOCK TYPE	Combined	Combined
CHECK FORM	UP-Ck4HRMS_v62.rpt	CP-ck3_v62.rpt
ADVICE LINES PER PAGE	999	999

* The code that appears first alphabetically in the list is the default code used at the point of printing checks. Give your code a name that will make it appear first alphabetically in the list for this bank.

PRINTER SETUP
In Sage HRMS, select FILE / PRINT DESTINATION.
- The options for "Report Paper Size" and "Report Orientation" should be checked.
- The option for "A4 paper in place of letter" should NOT be checked.
- "Letter" is usually the default paper size.

PAYROLL CHECKS
Print/Post payroll checks in Sage HRMS and stop at the Print Checks window. This is the screen with the Check Stock Code, Next Check Number, and Check/Advice Form. All of the individual checks should be listed at the bottom of the window with a status of "Not Printed". Select FILE / PRINT SETUP on this window. Select "Specific Printer" and choose the "*PrintBoss 50*" printer. Click OK.

Select the PrintBoss modified Crystal Report from the Check/Advice Form Browse window prior to printing. Checks will view PRIOR to PrintBoss formatting when you print to PREVIEW. Reselect the PrintBoss printer to print from the PREVIEW screen.

Section 3: PrintBoss Settings
The following items are suggested for the Sage HRMS. This may serve as an installation checklist if problems are occurring. This section is divided into 3 subsections: Required Settings (these MUST be done after the initial installation), Checklist, and Other Common Settings.

REQUIRED SETTINGS
FILE / PRINTER SETUP
Select the driver matching the Laser Jet printer. The PCL5e is recommended when available. Do not use a Post Script (PS) driver.

DO NOT select the PrintBoss 50 printer as the printer from the PrintBoss application.

EDIT / BANK LIST
Beginning with PrintBoss version 5.71.1, PrintBoss includes bank Wizards to make the setup easier. Simply click on Wizards and choose 'Bank Creation'. Each screen has instructions and suggestions specific to HRMS. You will be prompted to add a Logo or Signatures after the bank specific portion is completed.

PrintBoss comes with 10 bank accounts in the Standard edition. If more is needed, a Bank Key disk will need to be purchased. Call Wellspring Software, Inc., for more information.

Primary Tab:
- *Bank Code* — Enter the Sage HRMS bank code for this account followed by a colon and the company name. Ex: General Checking:ABC Company
- *Bank Prompt* — Enter any phrase for user recognition. Usually same value as Bank Code is best.
- *Bank Name and Address* — Fill in the bank information as it should appear on the checks.
- *Company Name and Address* — Fill in the company information as it should appear on the checks.
- *Next Check Number* — DO NOT fill in. The check number comes from Sage HRMS.
- *Confirm Check Number* — "Auto..."

MICR Tab:
- *Routing Number* — Enter the bank account routing number.
- *Account Number* — Enter the bank account number. Use a period to designate a space.
- *Check Number* — {CchkNo} or CCCCCC

Miscellaneous Tab:
- *2nd Signature Line* — Check this box if this account should always have a second LINE for signatures.
- *Canadian Style Date/Amount* — Check this box if the CPA06 standards should apply to this account.

Signatures & Logos Tab:
This tab is used if there is a signature or logo based on a PrintBoss Bank record. For these instructions, go to our website

CHECKLIST
OPTIONS / PRINTBOSS DRIVER SETTINGS
- *Transfer Folder/File*   {ComAppData\...\Transfer}\{WinUserName}
- *Append to Transfer File*   Do Not Check
- *Load PB32.exe*   Checked
- *Configurations Settings Save Location*   Local_User Registry (Standard)
- *Capture Mode*   Flag Trigger Required (or Always Capture)
- *PB 50 Driver Special Settings/Spool Dir* {ComAppData\...\Spool}

Click on OK when finished.

OPTIONS / CONFIGURATION
Please visit our website www.wellspringsoftware.com for specific install steps if you are on a Citrix or Terminal Server environment.

Settings Tab:
- *MICR offset adjustment*   Use if needing to adjust the MICR line placement. This field is workstation and user specific. Default values are 0.
- *Set Globally*   Checked
- *Work Files Private Folder Names* {WinUserName}
- Always Trigger/Capture Settings
  - Form   {ReqList}
  - Bank   (Grayed out)
  - PB#INFO flag overrides Above   Checked
  - Allow fragmented PB#INFO line Checked

Click on OK when finished.

OPTIONS / FORM/BANK REQUEST LIST
A Request List is NOT used for standard Sage HRMS interface.

OTHER COMMON SETTINGS
EDIT / FORMS / (highlight form) / EDITOR
CA_CP3   =   CND Payroll
SG_HRMS1   =   US Payroll

Settings Tab:
- *Copies*   0 = just the original (increase to print copies).
- *Auto-Archiving* Typically set to "Overwrite work files at start of batch". If printing copies, please refer to the manual for more details.

Multi-Parts & Printers Tab:
These settings are work station and user specific when<Locally> is selected under "Printer & Tray Selections Saved In…" at the bottom of this tab.

- *Print Time*   Original set to "Immediate". If copies are set to batch, research archiving method settings to avoid lost documents. (See user manual).
- *Source Tray*   Pulls the paper from the selected tray. This is based on the current printer in PrintBoss. The tray names may change if the printer selection changes.
- *Destination Printer* May be used to send designated copy to a printer other than the PrintBoss default printer. This field is also used for other PrintBoss functions, such as Emailing, Faxing, and creating PDF files.

Section 4: Using PrintBoss with Sage HRMS

If the PRINT DESTINATION in Sage HRMS is set to PREVIEW, the view on the screen will be prior to any PrintBoss formatting. The actual accounting data should be visible along with the "PrintBoss Trigger" which is a line of text in small font that begins with "PB#INFO". If you print to PREVIEW, you must select the PrintBoss printer driver from the preview and then click on PRINT again to send the documents on to the physical printer. Because these steps are required each time you print to PREVIEW, we recommend that

your print destination within Sage HRMS be set to PRINTER.

When checks are printed from Sage HRMS, print to the PrintBoss printer driver. If the bank code has not been entered in the PrintBoss bank list exactly as it appears in Sage HRMS, PrintBoss will prompt the user to select the account the first time checks are printed from that account. After the first time, PrintBoss should automatically recognize each account. No additional key strokes will be necessary by the user.