



## Detailed features of Sage 50 HR

---

### Sage 50 HR

---

#### Working with Employees

- Input personal details including address
- Input multiple contact details & next of Kin
- Input Employment Status
- Input Job type
- Input location & location address details
- Input Cost Code
- Input Reports To
- Input Validation of employment status
- Input Ethnic Origin
- Images
- Use Employee templates
- Input Validation of status (i.e. birth/marriage certificates, CRB checks, work permit)
- Input Employee type (Sub Contractors)
- Input Driving licence details

#### Absence & Work Management

- Manage Holidays, Sickness, Lateness, other absences
- Monitor working patterns
- Company holiday year

#### Performance Management

- Manage Disciplinary Records
- Appraisal Management

#### Skill & Qualification Management

- Ability to store Qualifications and expiry dates for accreditation purposes
- Record Training course details including cost

#### Salary & Job History

- Job Details (including Grade), Pay Details

#### Managing your Company

- Organisation structure - location, departments, cost centres
- Working patterns including templates

## Working with Sage 50 HR 2009

- Document Manager
- Use new Report Designer and pre-defined reports
- Set up Password and user groups - Menu and employee level access, Read only Access
- Use Diary view & Event Register
- List view - company, employees, location, department
- Customise 'pick list'
- Outlook integration

## Integration

- Integrate with Employee detail information in Sage Payroll 2007
- Use Microsoft integration to run a mail merge or create email

## Data Conversion

- Data Conversion from Sage Personnel v6

## Sage 50 HR vs. Sage Payroll

---

Not every business processes its own payroll and the people information that businesses now require extends much further than the traditional limits of payroll.

Whilst Sage Payroll offers some basic HR information (it can only be accessed and reported on an individual employee basis), Sage 50 HR 2009 provides much more advanced functionality that can be used to manage employee performance and development much more effectively.

## Appraisals

- **More advanced capability** (the manager the appraisal was reviewed by as well as who the appraisal was held by, ability to apply score and set targets)
- **Documents can be attached to each appraisal record**
- **Targets and scoring mechanism can be set up for company use**  
Easier to manage current performance and set targets for future performance

## Disciplinary

- **Ability to specify when disciplinary starts and ends**  
Easier to monitor disciplinaries to take place and those that are due for review
- **Can associate with previous disciplinaries**
- **Documents can be attached to each record**

## Salary & Job history

- **Can record reason for change, salary & working hours associated with each job**  
Easier to track career progression in the company and spot the 'potential'

## Processing capability (Personnel)

- **Ability to process in batch**  
Quicker to use

## Company details

- **More powerful organisation structure** - many to one relationship i.e. an employee can be in multiple departments  
More flexible

## Security

- **Can restrict access to each individual area as well as records**  
More control

## Reporting

- **Greater flexibility** - can report on the whole company as well as individual employees  
Control and flexibility  
Can identify who, what and when in one go

## Employee details

- **Reports to, next of kin, validation of employment**  
Supports compliance requirements

## Absence management

- **Ability to track lateness as well as 'paid absence'**  
Easier to track trends, manage performance issues and follow up on disciplinary

## Sage 50 HR Benefits

---

### Working with Employees

- **Input personal details (e.g. address, multiple contact details, employment status, job type)** Maintain and access all employee information in one place.
- **Use employee templates** Easily set up employee information based on other employees.
- **Input validation of status** Supports employer compliance requirements, ensuring the necessary evidence to prove eligibility for employment is captured.

### Absence & Work Management

- **Manage Holidays, Sickness, Lateness, other absences** Easily manage holidays, even if you have flexible working hours or a number of different holiday schemes. Ensure compliance with legislation
- **Monitor working patterns** Monitor attendance issues and reasons so that you can plan ahead

### Performance Management

- **Manage Disciplinary Records** Ensures all necessary procedures are followed together with supporting evidence, in case of disputes
- **Appraisal Management** Manage performance of staff to support development and rewards. Set targets for future achievement to improve quality of work

### Skill & Qualification Management

- **Ability to store Qualifications and expiry dates for accreditation purposes** Ensures that staff have the necessary skills to undertake their work, supports Health & Safety compliance. Easier to manage personal development plans
- **Record training course details including cost** Easier to manage training courses to support Professional Qualifications. Discover where there may be gaps in an employee's training

### Salary & Job History

- **Job Details (including Grade), Pay Details** Easy to monitor and manage career development of staff

### Managing your Company

- **Organisation structure - location, departments, cost centres** Easy to configure around your organisational structure
- **Working patterns including templates** Easily identify who works where and when

### Working with Sage 50 HR 2009

- **Document Manager** Access to all information can be easily retrieved to monitor trends, provide company statistics and alert for training & development needs
- **Password and user groups - Menu and employee level access, Read only Access** Peace of mind that information can be easily retrieved by those who are authorised to do so. Comprehensive security gives you the reassurance that sensitive information will remain confidential

### Integration

- **Integrate with Employee detail information in Sage Payroll 2007** and above. Removes the need to re-enter existing information
- **Microsoft integration** Communicate with your employees quickly and easily using professional mail merged letters and emails

### Data Conversion

- **Data Conversion from Sage Personnel v6** Easily migrate from Sage Personnel