



Data sheet

Shape workforce costs before they shape your results

Your workforce is one of your largest and most dynamic investments. Sage Intacct provides the financial context of the business. Sage HCM provides the workforce context behind it. Together, they help CFOs understand what is driving workforce cost, see where performance is moving away from plan, and act before the outcome is locked in.

Sage

Turn workforce cost into a decision advantage

Finance owns the workforce number, but the decisions that shape it happen across the organization. Hiring, scheduling, overtime, compensation, performance, and retention decisions can all affect results before their financial impact becomes visible.

Sage Intacct and Sage HCM bring financial and workforce context together, helping CFOs move beyond reporting what labor cost was to understand why it is changing, where variance is emerging, and when intervention can still make a difference. Instead of explaining workforce cost after it lands, finance can help shape cost and performance as they develop.

See what is driving workforce performance

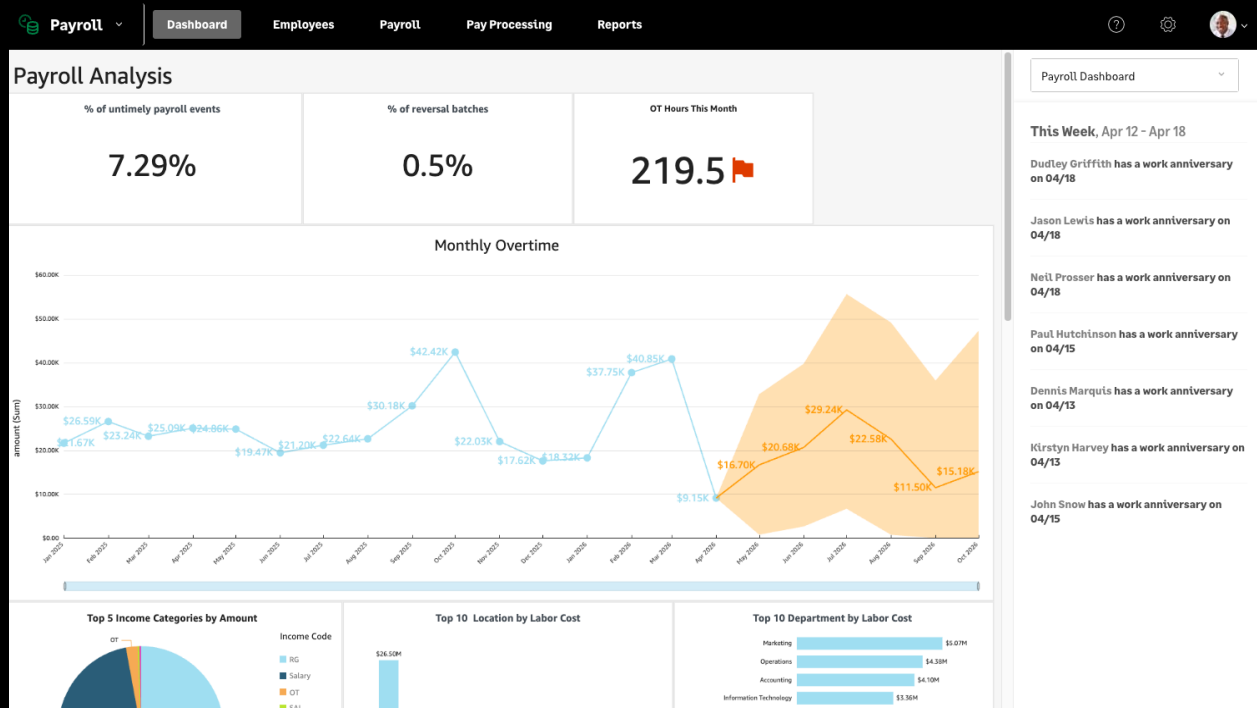
Workforce cost is more useful when you can see the decisions and activity behind it. Connecting financial information from Sage Intacct with workforce information from Sage HCM gives finance greater context for understanding how labor is tracking against plan and where changing workforce conditions may affect financial performance.

That means finance can move beyond reporting workforce costs to understand what is driving them. With greater visibility into hiring, deployment, overtime, compensation, and workforce trends, leaders can spot issues earlier, evaluate tradeoffs with confidence, and make more informed decisions before financial results are impacted.

Act before variance becomes the outcome

Timely workforce decisions depend on timely, trusted information. With one record flowing from time capture through approval, payroll, and the ledger, finance and HR spend less time exporting, rekeying, and reconciling information, and more time responding to what it tells them.

By streamlining payroll and workforce processes and eliminating manual handoffs between systems, organizations can accelerate access to workforce cost information, reduce administrative effort, and improve confidence in the numbers. Faster visibility into labor costs enables finance and HR to identify trends, address emerging variances, and make informed workforce decisions while there is still time to influence the outcome.



The Payroll Analysis Dashboard shows monthly overtime trending with the yellow items showing the forecasted values for April to October, based on historical results. There is also a flag against overtime hours as they are over budget.

Trust the numbers behind the decision

CFOs cannot confidently shape workforce investment if they are still questioning the underlying data. Sage connects approved workforce activity to payroll and the general ledger, reducing the handoffs where errors can be introduced.

With a single flow of workforce data from source to ledger, finance and HR can reduce reconciliation effort, strengthen payroll accuracy, and improve confidence in workforce costs. That creates a more dependable foundation for planning, forecasting, and investment decisions, helping leaders act with confidence rather than spending valuable time validating the numbers behind them.

Manage the whole workforce journey

Workforce performance is shaped by more than payroll. Sage HCM supports recruiting, onboarding, performance, compensation, learning, succession, HR, time, scheduling, and payroll using a unified employee record.

Together with the financial context of Sage Intacct, this gives leaders a more complete view of the workforce investment across the employee journey, helping the organization connect how it recruits, develops, rewards, and retains people with its broader financial priorities.

Unify Finance and HCM with Sage

You shouldn't have to choose between the best financial management and the best HCM solution or spend time bridging the gap between them. Sage unites award-winning financial management and HCM to bring your workforce and financial data together.

With a complete view of what is driving workforce costs and business performance, leaders can spot issues sooner, act with confidence, and make better decisions before outcomes are locked in. Finance and HR work from the same trusted numbers, spend less time reconciling data, and more time driving the business forward. It's one source of truth and one company accountable for the entire journey, from the first timesheet to the financial statement.



HR Functionality

HRIS functionality

- Intuitive drag-and-drop dashboard creation
- User-centric analytics and customizable KPIs
- Employment information management
- Effective dating for all employee actions
- Detailed profile and personal demographics tracking
- Dependent information management
- Health, welfare, and workers' compensation tracking and reporting
- E-Verify support
- Integration with WOTC services
- Role-based security profiles for enhanced access control

Benefits administration

- Open enrollment, new hire enrollment, and life event management
- ACA compliance reporting
- Carrier connectivity via EDI and custom file formats
- Effective-dated benefits deductions integrated with payroll

Workforce management

- Time sheet management
- Flexible time collection via self-service, mobile app time clock, and kiosk options
- Multi-dimensional time capture with up to 11 dimensions
- Tracking hours, pieces, and units
- Streamlined and configurable time attestation and approval workflow options
- Overtime, comp time, break, and shift differential calculations
- Automated alerts for overtime and lunch break compliance
- Robust time off and leave management
- FMLA and LOA automation and reporting

Position management

- Flexible employment classification
- Easy-to-use support for multiple positions and pay rates
- Position management tools
- Position control for streamlined workforce planning
- Union job classifications and rate table integration
- Budget tracking and analysis by position

Flexible scheduling

- User-friendly employee scheduling tools
- Shift assignments based on job requirements, skills, and certifications
- Shift swapping with automated approval workflows
- Employee availability tracking for seamless scheduling
- Mobile and web access to employee schedules

Centralized document management

- Customizable form designer for document creation
- Secure folder access for administrators, managers, and employees
- Comprehensive reporting on form data and surveys
- E-signature functionality
- Compliance support with federal and state documents

Robust reporting and data access

- Standard and compliance reporting tools
- Ad hoc reporting with drag-and-drop functionality
- Direct SQL data access for advanced analysis
- Scheduled reporting for automated insights
- Reporting on configurable forms and screen data

Powerful employee and manager self-service

- Customizable company and department new feeds tailored to employee types
- Confidential employee/manager feedback reporting
- Surveys with NPS scoring and automated alerts
- User settings and profiles
- AI-powered chatbot
- Enhanced security with two factor authentication
- Multi-language support
- iOS and Android apps
- Manager access to team talent management tools
- Manager access to time and attendance

Configurable features

- Configurable fields, forms, and documents
- Customizable screens for client specific needs
- Notifications via SMS, email, and mobile app
- Functions like an in-house application with table access
- Streamlined workflow management
- Single sign-on support across Azure, Okta, Entra, Auth0, and OpenAuth

Payroll

Robust, flexible payroll processing and analytics

- Payroll analytics dashboard
- Labor distribution
- Support for multiple companies and entities
- Multi-country support with automatic tax updates (US, Canada, UK, Germany, and more)
- Flexible pay cycles with each company
- Multiple pay rates for individuals in a single pay cycle
- Support for multiple bank accounts for payments
- Employee direct deposit for to multiple bank accounts (percentage or fixed amount)
- Unlimited batch processing (including same pay period and month)
- On- and off-cycle payroll processing
- Unlimited taxable and non-taxable incomes and deductions with effective dating per employee
- Process hourly, salaried, and contractor payments together
- Special pay period management
- Support for special tax considerations
- Import externally calculated incomes and deductions
- Unlimited gross-to-net calculations
- Viewable and editable employee pay records
- Add or remove employees during batch creation
- Retroactive pay, bonuses, and commissions
- Add notes for employees
- Customizable batch screen with sorting and filtering options

Payroll validations and corrections

- Previous pay batch comparison
- Retroactive pay calculations
- Export of batch to excel

Union payroll reporting

- Union rule configuration for certified payroll rates
- Prevailing wage calculations
- Premium pays
- Certified (WH-347) reporting, Davis-Bacon, integration with LCP tracker, Points North, and more

Accurate time capture solutions

- Easily load approved time data from Sage HCM timesheets
- Direct integrations for 3rd party ERP and time systems

Simplified expense reimbursements

- Employees can submit expenses via self-service and mobile, including receipts and invoices
- Approval workflow for expense submissions
- Approved expenses seamlessly load into payroll
- Expense import from Sage Expense Management, 3rd party systems, or files

Support for complex payroll calculations

- Gross up pay
- Union pay calculations, including fringes and deductions based on CBAs
- Configurable tax treatment for income and deductions
- Support for complex income and deduction formulas

Versatile employee payment processing options

- Direct deposit (ACH, EFT, BACS), checks, and pay card
- Standard and custom check stock formats
- Ability to change payment type during pay processing
- Employees earned wage access through Clair
- ACH integration with Kotapay
- Paycard integration with FinTwist

Tax reporting and filing options

- Multiple options tailored to your needs
- Standard reports for in-house filing
- Integrations for full-service filing
- Assisted tax filing support with Aatrix

Employee-self service access

- View income and deduction details
- Update tax filing status
- Access pay history and download pay period statements
- Add or edit direct deposit details (percentage, fixed amount, or pay period selection)

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Powerful reporting

- Dashboard reporting with real-time analytics
- Standard and compliance reporting
- Ad hoc reporting with drag-and-drop functionality
- SQL data access for advanced queries
- Schedule reports for automated delivery
- Tax reporting options
- Compliance reporting:
 - USA: W-2, W-3, 1095, 1096, 1099, 940/941
 - Canada: ROE, T4, T4A, RL1, CCQ
 - UK: P11D
- Global HR and Payroll supported in 180 countries via integrations with partners, with 5 of the largest countries natively supported in Sage HCM

Talent engagement

Applicant tracking and recruitment

- Recruitment and application analytics dashboard
- Seamless job posting connectivity to external and internal job boards
- Workflow integration for hiring manager collaboration
- Online application forms, including e-signature support
- Customizable question sets with assessments and “knockout” questions
- Interview templates for candidate scoring and note-taking
- Job requisition forms with integrated workflow
- Position management tools
- Digital parsing of applications and resumes for candidate data collection
- Communication with candidates via email and text
- Candidate portal with secure login
- Offer letter templates and generation
- Background screening through trusted partners
- Integration with over 25,000 job boards

Holistic performance management solutions

- Company and employee goal setting
- Self, manager, and peer employee reviews
- 360-degree feedback reviews
- Flexible frequency options for reviews
- Customizable rating scales
- Unlimited competency tracking
- Unlimited review templates and types
- Digital storage of review records
- Digital signature for review sign-off

Strategic compensation management

- Unlimited distribution rounds
- Access restricted by security profiles
- Recommended pay rates aligned with company policy
- Option to add additional employee or position data
- Date of last pay raise
- Last performance review rating
- Review rating for compensation considerations
- Minimum, maximum, and compa-ratio for employee's position
- Merit and/or bonus distribution management
- Budget allocation for compensation distribution
- Workflow compensation approval process
- Compensation distribution to payroll with effective date

Succession planning

- Tracks readiness of internal and external successors
- Matches skills and competencies to identify the best fit
- Identifies optimal replacement candidates
- Assesses flight risk and impact of talent loss
- Reporting on best fit succession by position
- Career mapping and development for employees

Recruiting

- View job postings
- Candidate information/details
- Communicate internally with recruiters
- Conduct interviews

Onboarding

- View all outstanding personal tasks (both new hire and current employees)
- Complete assigned tasks
- Complete/Sign/submit forms
- Update personal data - address, dependents, banking details, etc.

Performance reviews

- Complete performance reviews
- View performance review history - both personal and direct reports
- Maintain journals - both personal and direct reports (maintain private journals)
- Feedback - request and receive
- Set/update goals - company, personal, and direct reports

Powerful learning management systems

- Auto-assign courses by employee groups
- Manager-assigned courses for employees
- Employee course selection from a comprehensive course catalog
- Supports SCORM and AICC formats for e-learning
- Compatible with Word, Excel, PowerPoint, Text, and PDF formats
- Training tracking for upcoming, past due, by course, class, or employee
- Detailed reporting on training progress
- Certification management:
 - Uploading, tracking, expiration alerts, and recertification process
 - Unlimited skills library with categories and skill levels
 - Searchable library to identify qualified employees

Self-service

Learning management

- View assigned courses and classes
- Select new courses and classes from catalog
- View course and class history
- Insutruactor access to roster, attendance, and grading

Expense report

- Take a picture and upload receipts

Surveys

- eNPS
- Anonymous responses available

Calendars

- Upcoming company events
- Birthdays
- Training
- Time off - personal and team

Additional capabilities

- Feedback - named and anonymous
- Engagement and news feeds
- Configurable fillable screens
- Reusable forms
- Company documents library
- Company videos
- External links

System configuration

HR administration

- ACA - 1094/1095 reports and transmission to IRS
- Benefits - date effective including new rate tables and formula driven plan qualification
- Carriers
- Company events
- Employee groups
- Delegations
- Holidays
- Jobs
- On and off-boarding
- Open enrollments - multiple enrollment capabilities, new hire, life events
- Salary grades - grades, steps in grade ranges
- Projects
- Screening
- Task groups/projects, subprojects and cost codes
- Create tasks, assign to employees to track time or autodistribute based on percentage
- Time offs - unlimited time off plans, accrue, block issues, carry over (or not, or a limited amount and a limited time)
- Work locations
- Work periods - standard work hours

Payroll administration

- Bank accounts
- Multiple payroll accounts for each company
- Deduction frequencies
- Deductions
- GL account mapping
- GL integration w/ labor distribution
- GL accounts
- Incomes - taxable or non-taxable
- Pay groups
- Payroll schedules
- Shift rates
- Tax rates
- Time clocks
- Timesheet layouts
- Union rate tables
- Fringes and deductions (employee and employer contributions)
- Workers compensation

Recruiting administration

- E-verify
- Job publishing sites

- Question sets
- Recruiting settings

Compensation administration

- Compensation rounds
- Merit increase and bonus allocations (\$ or %)

General administration

- Dashboards
- Documents
- Forms
- Self-service links
- Videos

Learning management administration

- Certifications - track expirations and renewals
- Classes
- Courses
- Instructors
- Learning paths
- Skills library

Performance management administration

- Company goals
- Rating scales
- Competency library
- Review periods
- Review templates

Employee engagement administration

- Badges
- Communities
- Confidential reporting
- eNPS surveys and results
- Feedback
- Reports
- Screens

Task scheduler

- Automate processes
- Reports - standard, custom, and ad-hoc
- Auto-add benefits and benefit plan calculations
- Certification expiration and overdue notifications
- Time off accruals and timesheet alerts

- Employee/course scheduler
- Apps
- Carrier Connects

System settings

- API keys
- Calendar policies
- Classification codes
- Code tables - modify existing and create new code tables (drop down menu selections) including language
- Compensation types - create new based on (non)cash, (non)taxable, (non)subject combinations
- Custom fields and formats
- Custom localization
- Custom reports
- Custom screens
- Data import
- Deduction types
- Document delivery - W2s, T4s, P11Ds
- Employers - unlimited
- Employee self-service widgets
- Field configuration - audit any data field
- General ledger
- Notifications and Layouts - customizable message and delivery (email, SMS text, and employee self-service)
- Overtime rules
- Password policies
- Payroll settings
- Report settings - date, time, and name formats
- Security profiles
- Self-service help
- Support access - limit client support access by IP address and expiry time
- Tax engine
- Workflows

Technology and security

Hosting

- Amazon web services (AWS)
- SOC II compliant
- Hosting facility is dictated by company locations (US, Canada, UK)

Security structures

- POD architecture
- Limited number of clients per POD
- Multi-server farms
- Uptime monitoring

Security monitoring

- Amazon Inspector
- Amazon GuardDuty
- Amazon Macie

Access monitoring

- All access to Sage HCM is through RESTful API calls
- All calls are logged at load balancer
- Kibana is used to monitor access - login attempts, error logs
- AWS CloudWatch monitors all activities

Data encryption

- All data encrypted at rest
- Login password hashing HmacSHA512, unique per user
- Database passwords encrypted - 256 bit AES, tenant's encryption keys, 90 day key rotation

Disaster recovery

- To the minute recovery for last 35 days, weekly beyond
- Servers and infrastructure can be rebuilt in less than 4 hours
- AWS Aurora maintains copies of data in 3 availability zones
- Read only replica in a different region than primary
- Annual testing

Multi-level employee security

- 2 factor authentication
- Single sign-on: Azure, Okta, Entra, Auth0, OpenAuth

Software stack

- HTML 5
- 100% RESTful API
- Play framework, Scala
- AWS Aurora, MySQL

Support portal access

- All Sage HCM implementation and support is accessed through the support portal
- Clients, optionally, can enable support portal access to their designate support person and set expiration time
- All access by Sage HCM personnel through the support portal is logged and available for client review
- Access to the support portal is restricted to whitelisted IP addresses
- Sage HCM personnel access is restricted to Sage offices or VPN
- Any terminated Sage personnel's access is revoked immediately





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