NORMING RESOURCE MANAGER 2026

Key Enhancements

Implementation Consultants

Enhancements primarily for implementation consultants

- Faster multi-company rollout through setup-data copying and centralized entity administration.
- Easier approval design through the Workflow Wizard and expanded workflow configuration options.
- Better integration readiness through seven transaction APIs and two-way data exchange.
- Less repetitive administration for ESS users, groups, substitute users and test entities.

Enhancements primarily for end-users

- Earlier budget control and clearer tracking for travel and expense processes.
- Reduced duplicate claims and stronger attachment compliance.
- Improved purchasing, RFQ, invoice and payment visibility.
- More flexible workflow, better notifications, clearer reports and stronger audit trails.

Important note

Some enhancements benefit both audiences. They are placed in the group where the most immediate operational value is expected, while their wider benefit is explained in the final column.

Enhancements for Implementation Consultants

Primary value

These enhancements shorten implementation time, improve consistency across companies, simplify workflow configuration and make integrations easier to design and maintain.

Enhancement	What changed in RM2026	How it helps
Copy R/M Setup Data Utility	Selected Resource Manager setup data, employees, workflows and suite configurations can be copied from an established company to a newly activated target company.	Reduces repetitive setup work, shortens multi-company implementation time and improves consistency between entities. This import function can only be used for newly activated RM companies that do not yet contain any RM transaction data. It should not be used for companies where the RM module has already been in use.
Approval Workflow Wizard	A guided wizard helps create transaction workflows, approvers, conditions, notification templates and amount-based routing. It includes a formula generator and workflow preview.	Makes workflow design easier for new consultants, reduces configuration errors and provides a faster starting point for more complex approval structures.
Entity-independent ESS Groups	ESS Groups are no longer tied to a single Sage 300 entity and can be reused across companies.	Avoids recreating the same group for every company and supports more consistent security and approval design across multi-entity customers.
Simplified multi-entity ESS users	The ESS User list shows one user with access to multiple entities, rather than a separate line for every company.	Makes user administration easier to understand and reduces confusion when checking licences, access and entity assignments.

Enhancement	What changed in RM2026	How it helps
Apply user changes across entities	Changes made to an ESS user in one entity can be applied to selected additional entities.	Removes the need to repeat the same update company by company and reduces the risk of inconsistent permissions.
Inactive Entity control	An entity can be marked inactive, preventing users from accessing it without disabling each account separately.	Provides a cleaner way to close test companies after implementation and reduces the risk of users entering data in the wrong entity.
Create users from the Entity screen	ESS user accounts can be created directly while setting up a new entity.	Streamlines onboarding during a new-company rollout and reduces navigation between setup screens.
Seven transaction APIs	APIs are available for Expense Report, Timesheet, Purchase Requisition, PO Receipt Requisition, PO Invoice Requisition, AP Invoice Requisition and Sales Quotation.	Gives consultants a standard integration foundation for connecting Resource Manager with portals, operational systems and other applications. External systems can push transactions into Resource Manager, while Resource Manager data can be retrieved for use elsewhere.
Expanded workflow variables	Additional conditions are available for GL budget, PJC budget or estimate, Resource Manager limits and selected travel and purchasing scenarios.	Allows consultants to configure more precise exception routing and escalation without relying on manual intervention.
Dynamic Employee Groups	Employees can be added to approval groups using custom roles or SQL-based logic instead of being maintained one by one.	Makes approval groups easier to maintain in organizations where membership changes frequently or follows defined business rules.
Multi-entity substitute settings	Substitute-user settings created in one company can be applied to other entities.	Speeds up multi-company configuration and helps prevent approval delays when the same approvers work across several entities.
Custom report parameter reordering	Report parameters can be moved up or down using dedicated buttons instead of removing and recreating them.	Reduces setup effort and makes it easier to present custom-report prompts in a logical order for users.

Consultant takeaway

The most valuable implementation message is that RM2026 reduces repetitive setup, makes workflow configuration more approachable and provides a clearer route to integration. This should lower implementation effort while improving consistency and user adoption.

Audience	Recommended message
Implementation consultants	RM2026 reduces setup repetition, makes workflow configuration easier and gives you better tools for multi-company deployment and integration.
Customer administrators	RM2026 simplifies user and entity administration while improving control over access, substitutes and approval routing.
Employees and requestors	RM2026 reduces repeated entry, provides clearer budget and claim information, and helps you submit complete requests the first time.
Approvers and managers	RM2026 gives approvers better budget visibility, stronger exception routing and clearer transaction history.
Finance and procurement teams	RM2026 strengthens duplicate prevention, budget control, invoice traceability, payment permissions and audit information.