

Infoslips

Super User Quick Guide



Phase 1- Export Data: Sage Payroll

1. Create a folder for the applicable month inside the VIP InfoSlips Folder, e.g. Jan2016.
2. Access the VIP InfoSlip Company.
3. On the Main Menu click on:
 - **E-Solutions**
 - **InfoSlip Exports.**
4. Complete the Global Memo and the Welcome Text Tab and copy to other InfoSlip companies if required.
5. Click on **Continue.**
6. Choose a **Payment Date.**
7. Click on **Browse...** for destination for export files the browser will default to the VIP directory where the Export Files will be exported to. Save the file to the applicable month folder created above. **Click on OK.**
8. Radio button selection "**InfoSlips Only**" then "**Export All**".
9. * Select the range of employees that you would like to export.
10. Click on **Continue.**
11. Include Multiple Companies if necessary.
12. Access the **VIP InfoSlips** Folder and select applicable **month (e.g. JAN2016)** created above.
13. Compress (Zip) the Standard InfoSlip file, e.g. January 2017 file: **INFO20160131S001001_EXPORT_S.0**
14. Compress the Consolidated InfoSlip file, e.g. Period end 15 Jan 2016 **INFO20160115 S001001_EXPORT_C.0**
15. How to compress files: Right click on file, click on Send to, click on Compressed (zipped) folder.
16. **Delete original export file.**
Note: If you have multiple export files please compress each file individually. Do not compress files together.

*Export Range:

All (All records linked to InfoSlips on Analysis Details in VIP)
 Range (Enter specific employee codes e.g. From: 0001 To: 0001 etc.)

Phase 2- Transfer and Process Data

1. Go to the InfoSlips Website: www.InfoSlips.com
2. Click on **Admin Login.**
3. Enter your **Username and Password** and click on **Go.**
4. You will be routed to Services home.
5. Click on **Start & Proceed with Runs.**
6. Under Create New Runs select the correct Template (Logo):
 - Select the Processing/**Pay Period (Month).**
 - Insert a Name Suffix (This is optional)
 - Click on Insert to **create a Run profile.**
 - Click on **Continue.**
7. Data Files will be listed, e.g. VIP Data Extract [001] where the Export File will be uploaded. Note: If Data File is missing from list, contact InfoSlips Support.
8. Click on Browse:
 - Search for the export file/s created in Phase 1 and attach the correct file (note processing date in file name) to the corresponding template.
 - Ensure that all Export files and/or additional files expected, e.g. Travel claims, etc. have been attached.
9. **Click on Upload: Wait for All files successfully uploaded message.**
 (this means that the file/s attached have been transferred via Internet successfully)
10. **Click on Process Trials.** (data will now be compiled into trial InfoSlips)
 After Processing of the Data Files are completed you will be notified via e-mail to continue with the next step in workflow (Phase 3).
11. **All new employees' PUK Numbers** will be generated once the latest export file has been uploaded and processed. These **PUK numbers will be e-mailed as a compressed(zip) CSV file.**
 - Unzip and save this file in your InfoSlips Folder (Desktop) under the applicable month and merge this file with the MS Word PUK Template (will be provided) to create the PUK Letters. Delete the New Recipients File out of your Inbox and Deleted Items after the information is saved in the InfoSlips Folder.
 - Distribute the PUK Letters BEFORE the delivery of InfoSlips to avoid unnecessary employee support.

Phase 3-Requesting Trials and Release/Schedule of InfoSlips

1. Go to the InfoSlips Website: www.InfoSlips.com
2. Click on **Run Administrators.**
3. Enter your **Username and Password** and click on **Go.**
4. You will be routed to **Services home.**
5. Click on **Start & Proceed with Runs.**
 Under **Incomplete Runs** select Run period by clicking on **Select.**
6. Please check that the **Number of New Recipients** listed at top of page corresponds to the number of new engagements linked to InfoSlips in VIP Payroll.
7. Step 1: Select **Run Type.** (defaults to Trial)
8. Step 2: Select **Number of Trials InfoSlips.** (defaults to 5)
9. Checking Trials: You can either view your trials on line by tapping on the Preview link or request for trial/file to be sent to e-mail (continue with Step 3) to view from Desktop.
10. Step 3: Confirm the **Trial Run User Email Address.**
11. Step 4: Specify the **Encryption Type. (Always use Sample PUK)**
12. Click on **Send Trial Run.**
 Trial InfoSlips will be e-mailed to User requesting trials.
13. Open and check if InfoSlips dates, logo, graphs, etc. are correct.
14. Go back to **Start & Proceed with Runs.**
15. Select **Schedule Run** and specify the date and time for the e-mail batch to be delivered.
16. *Note: If content of Trial InfoSlips is incorrect (e.g. incorrect date etc.) please refer to the 'Cancel Run' section in the Quick Reference Guide.*
17. If you have **Consolidated** InfoSlip files please insert new Run profile/period and process to the Consolidated Template.
18. Standard and Consolidated Export files must be processed and released separately.
19. For Separate Payslip Runs, e.g. bonus, commission, etc. please refer to the relevant section in the quick reference guide.

NB: It is always advisable to request trials to check that you have attached and transferred the correct months export files to the InfoSlips servers. Once the batch has been released the e-mails cannot be recalled.

InfoSlips Support contact details:
info.support@sage.com