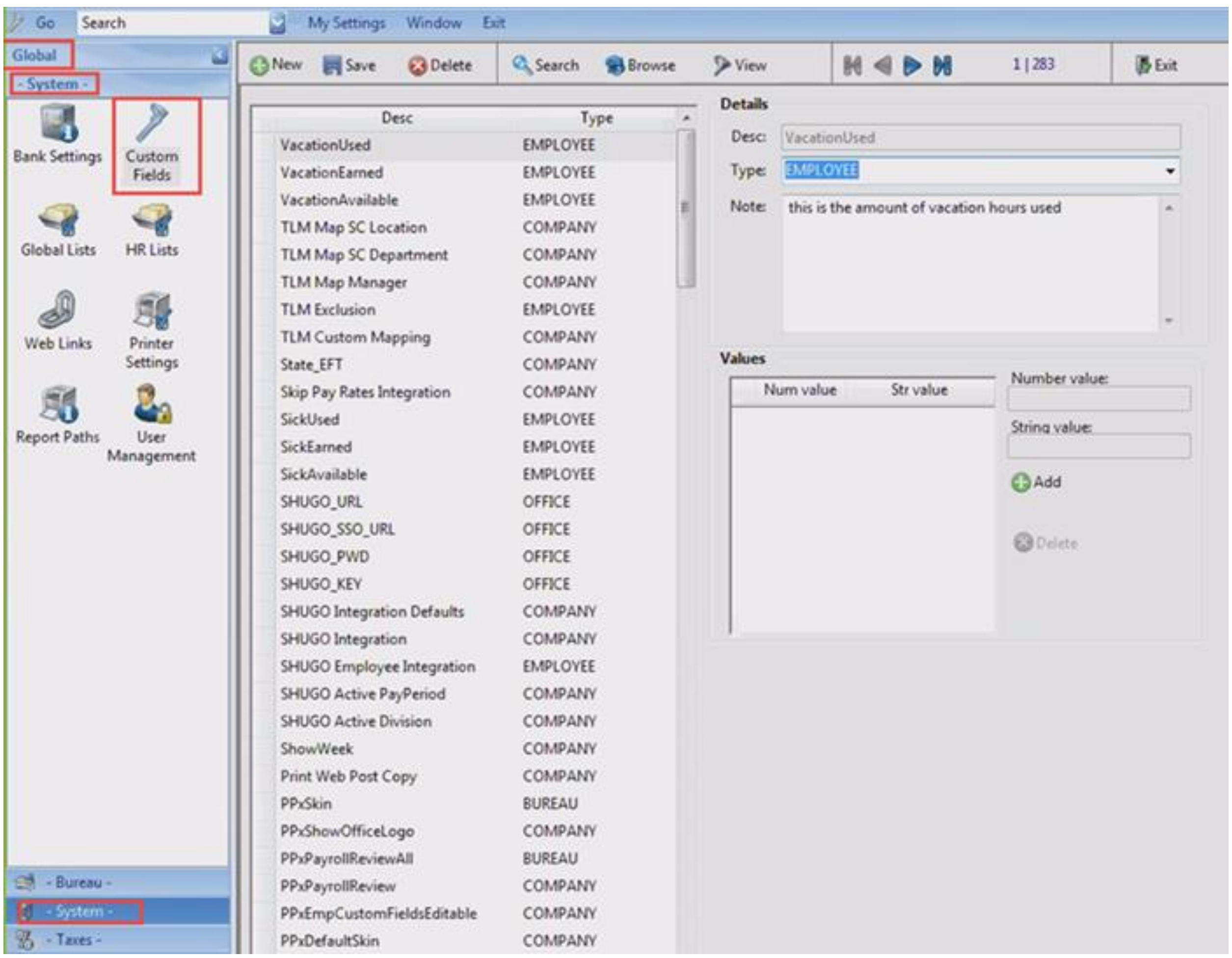
Report Delivery Setup For Execupay Bureaus

Summary

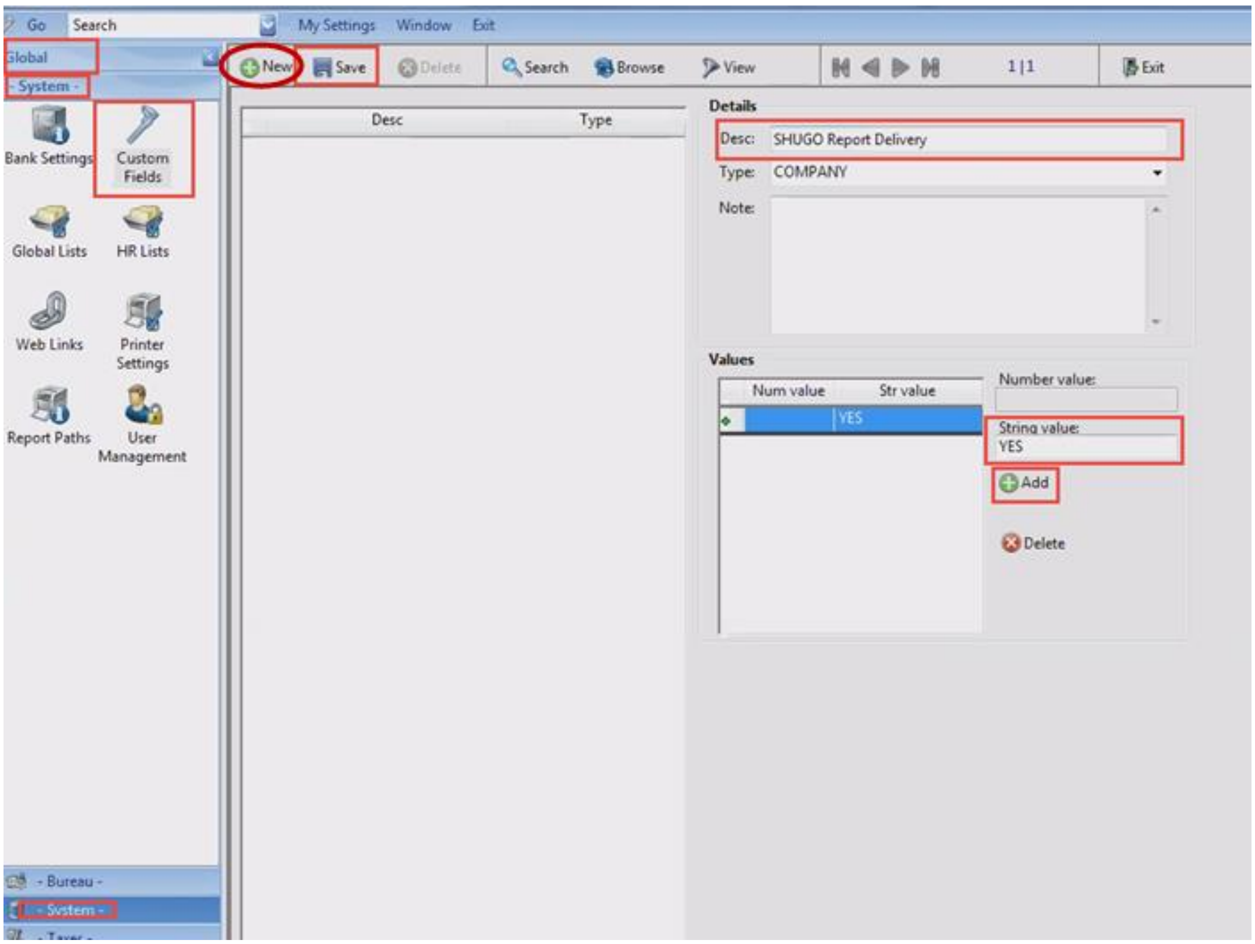
Report delivery is now a key piece of HUB for Execupay bureaus. Once the Shugo FGX software, which handles reading reports out of Execupay's database, and the Shugo historical report extract utility, which is used to migrate historical reports from Execupay to Shugo, are installed there are a few steps to follow within Execupay and FileGuardian to enable report delivery. This guide walks through these steps.

Execupay Setup

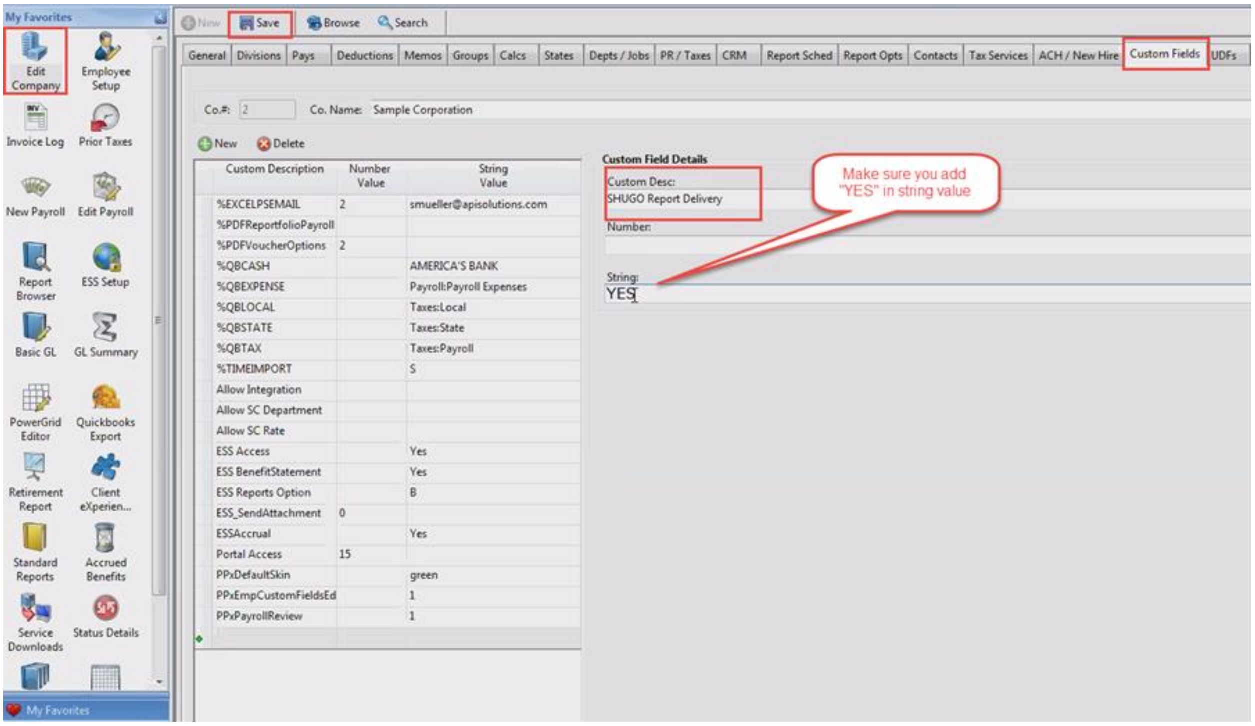
1. **Creation of a new Custom Field:** Within Execupay, go to the "Global" section and then "System" to get to "Custom Fields".



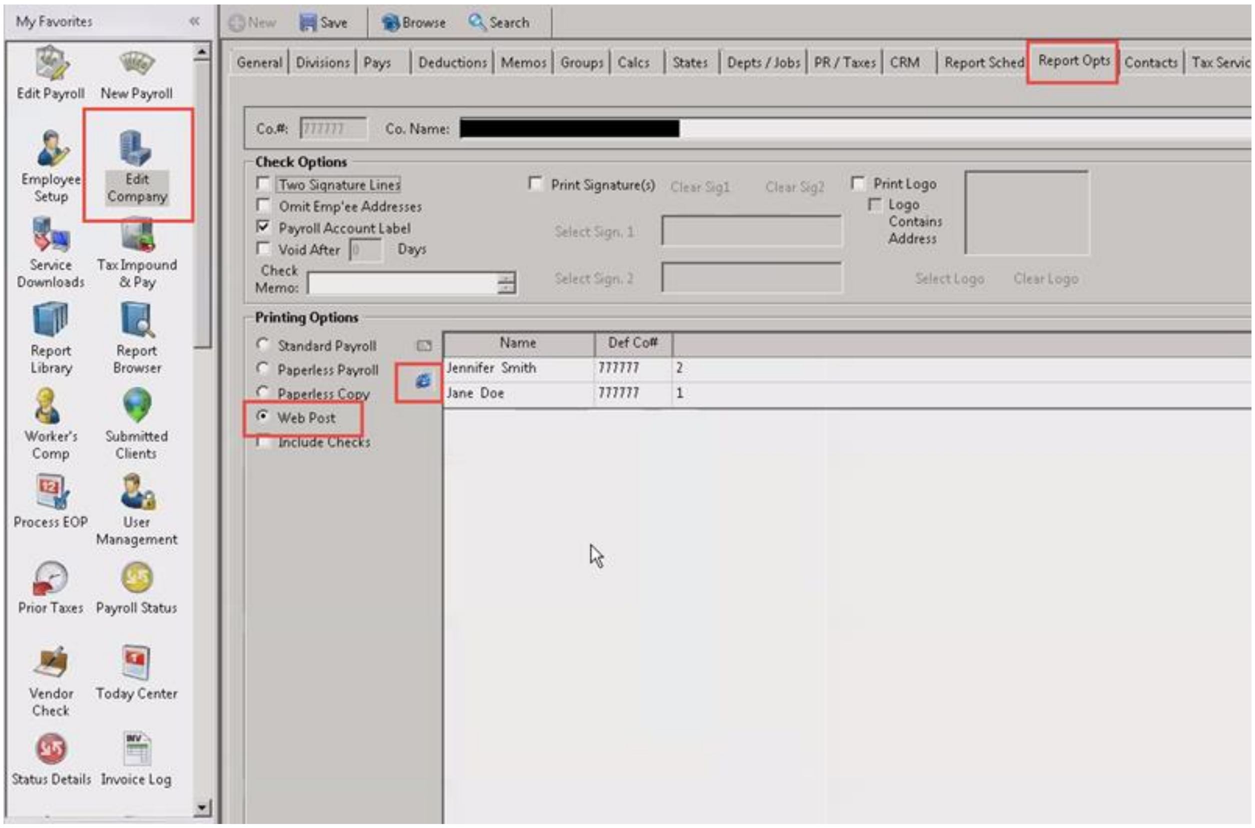
2. **Create a "SHUGO Report Delivery" Custom Field:** Select "New" to create a new custom field. Name the custom field "SHUGO Report Delivery". Next, add the string value of "YES". In some cases you may need to add "YES" twice before it will show within the Values list. Make sure to hit "Save" button on the top menu once you are done to add the custom field.



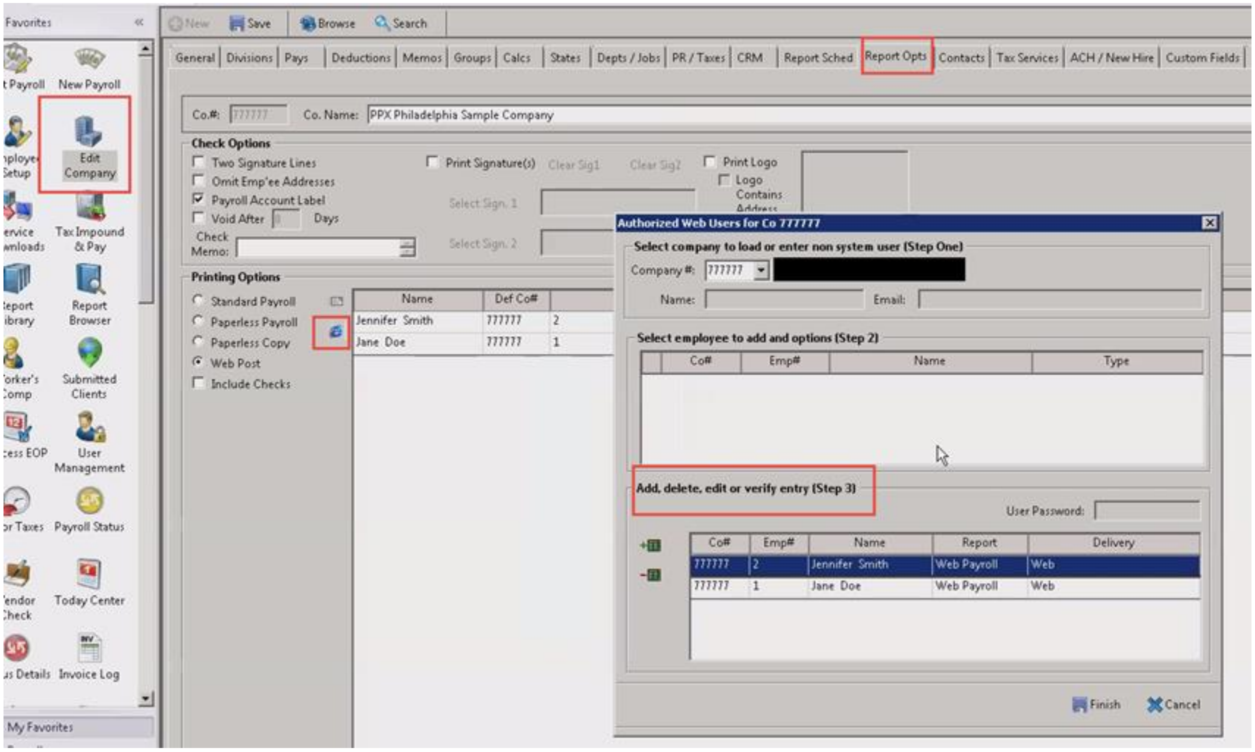
3. **Turning on Report Delivery for Clients:** After you've created the global SHUGO Report Delivery custom field, you will now turn on report delivery for clients. First, go to "Edit Company" and then look up the company by their company code. Next, assign the custom field SHUGO Report Delivery and make sure the string value is YES. Lastly, hit "Save" on the top menu bar.



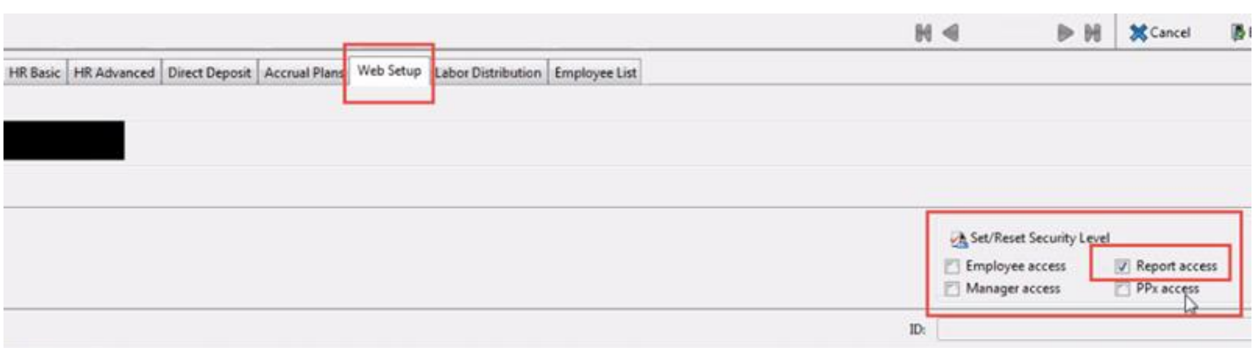
4. **Payroll Reports and Report Options:** Report Options, denoted in the Report Opts tab, controls the payroll report recipients. On the left hand side within this tab, you have Printing Options. Make sure that 'Web Post' is selected. Once selected, you may see recipients that have already been set up for Execupay's RSS. If you see the intended recipients listed, make sure HUB has been turned on for them. Hit "Save" and you're done.



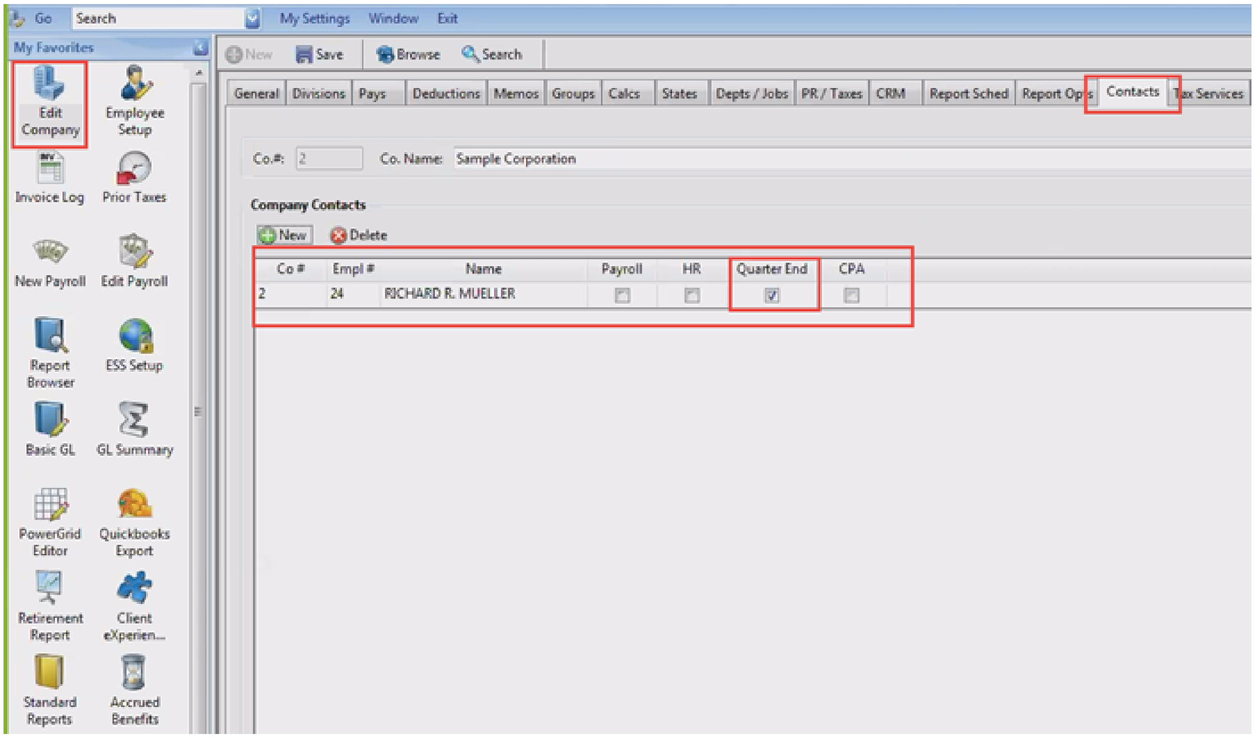
5. **Report Recipients:** To set up initial recipients, or to set up additional recipients, you will click the Internet Explorer “e” which will show a list of eligible recipients. Here you can add as many as you would like. If the recipient you are looking for does not appear within the available employees, you will need to enable RSS report access for them (see below). Once you have all the recipients added, make sure to hit “Save” and again, make sure they are HUB user. If not, go ahead and enable HUB for them on the Shugo screen within Execupay.



Enabling RSS within Execupay: Visit the “Employee Setup” area within Execupay and then select “Web Setup”. On the right hand side it shows “Report Access”, enable this for the employee in question. Now the employee can be added as a report delivery recipient in above screen.

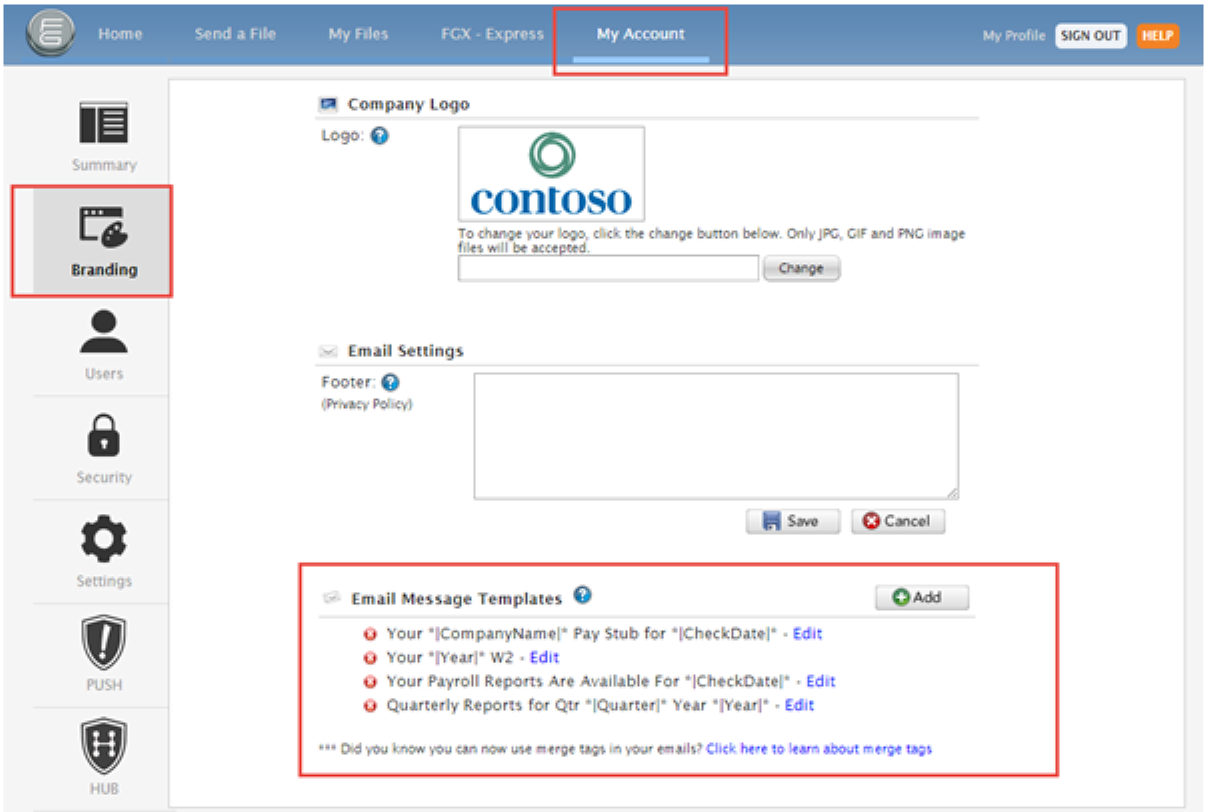


6. **Quarterly Reports and Contacts:** For quarterly report recipients you will visit the “Contacts” tab under “Edit Company”. You will either need to add a recipient or select from the existing recipients. Simply check the “Quarter End” box and you have set up quarterly report delivery. Once again, make sure they are a HUB user and don’t forget about “Save”!



FileGuardian Setup

1. **FileGuardian Settings:** You will want to make sure that your FileGuardian account recognizes report delivery. Once logged into FileGuardian visit the "My Account" area followed by "Branding". Here you will create Email Message Templates recognizing payroll report and quarterly delivery. To create a new template simply click "Add", or to edit an existing template simply click "Edit". Reference below for sample text for templates.



Sample Email Templates: Below is text to assist with the creation of the email message templates. Feel free to copy/paste or make any modifications necessary. *It's best to paste into NotePad first before pasting in FileGuardian to ensure all formatting is wiped clean. You'll also want to customize these templates with your payroll company name and contact information.*

Payroll Reports

Subject:

|CompanyName| - *|CheckDate|* Payroll Reports

Body:

Dear *|RecipientFirstName|*,

Payroll reports for *|CompanyName|* for check date *|CheckDate|* are now available.

Thanks,

Your Payroll Company

Quarterly Reports

Subject:

|CompanyName| - Quarter *|Quarter|* Reports

Body:

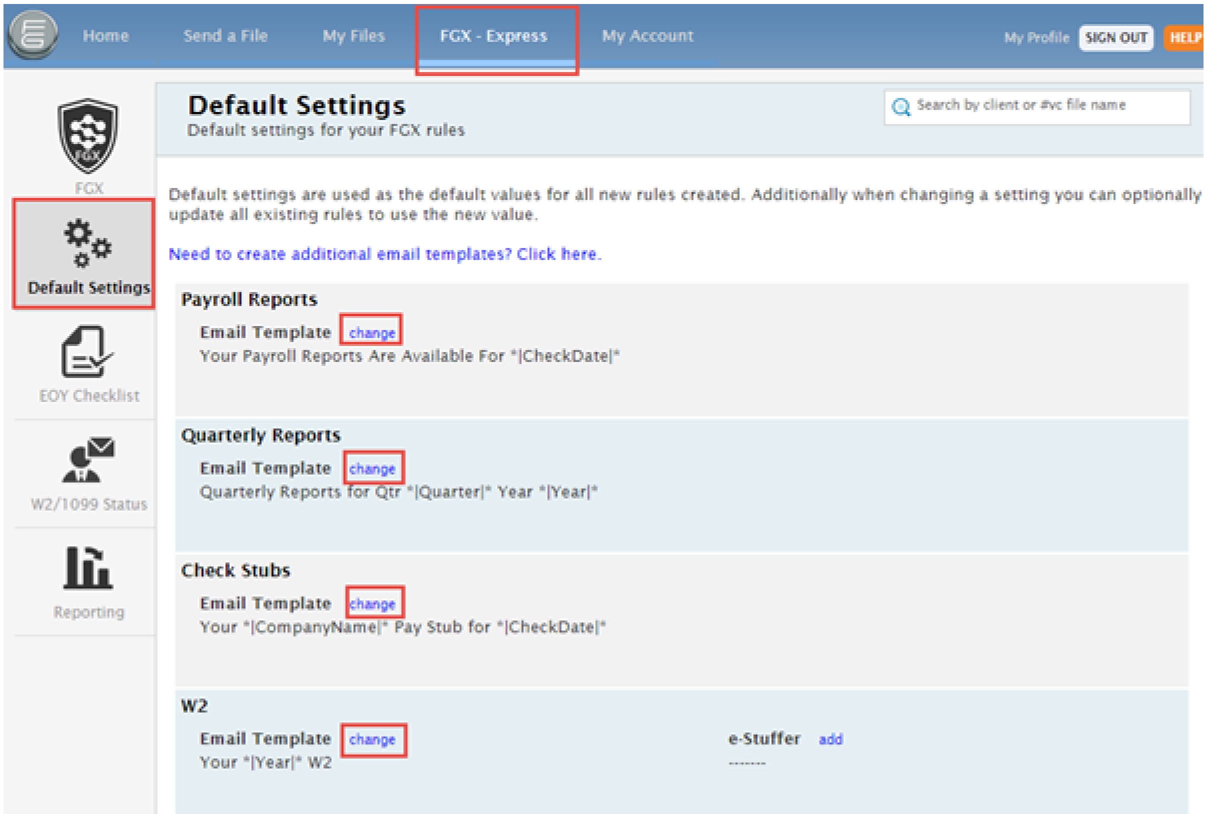
Dear *|RecipientFirstName|*,

Your Quarterly payroll reports are now available.

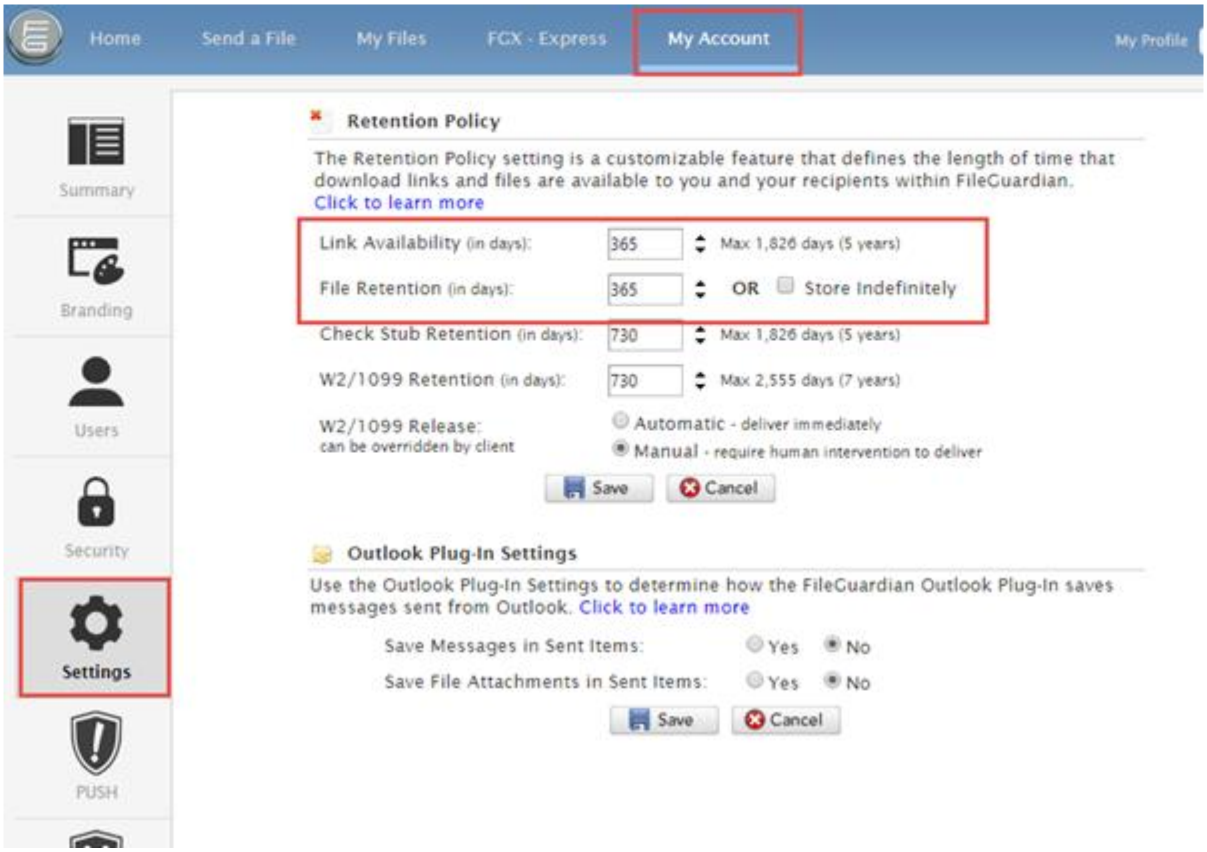
Thanks,

Your Payroll Company

2. **Assigning Email Message Templates within FGX-Express:** Once you've created the email message templates, you now need to assign them to the type of delivery. Visit the "FGX-Express" area within FileGuardian, followed by "Default Settings" and assign the template to the delivery types by simply clicking "change" and selecting the appropriate template.

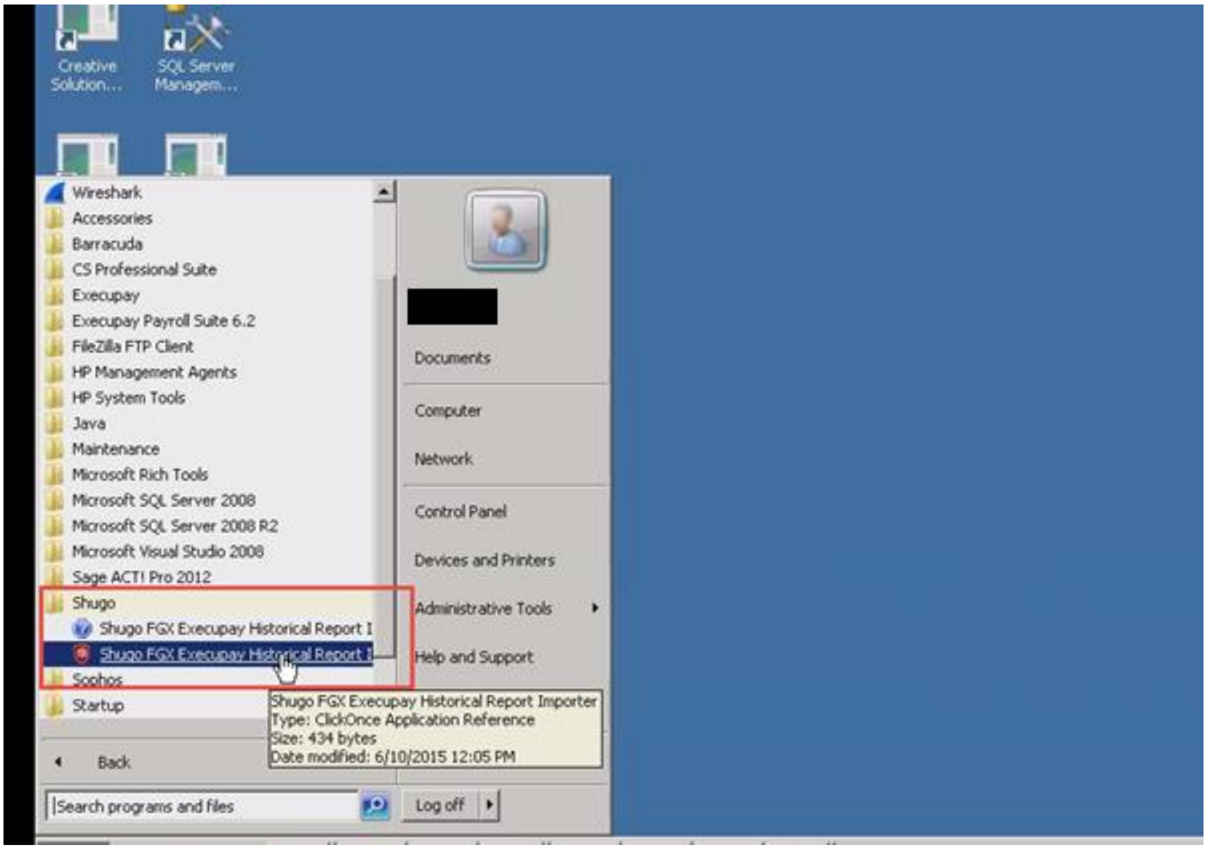


3. **Retention Policies:** The final step within FileGuardian is to set the retention policy for report delivery. Visit the “My Account” area followed by “Settings”. Within Settings you will set a retention policy for ‘Link Availbility’ and ‘File Retention’. ‘Link Availability’ determines how long your clients will be able to access the reports you send to them. ‘File Retention’ controls how long the reports are available within FileGuardian for you, the bureau, to access. They work hand in hand so we strongly recommend setting these both to the same number of days.



Historical Report Loading

1. **Historical Report Extract Utility:** Once the Shugo historical report loading utility has been installed on your Execupay database server, you will use it to post the historical reports (last two years of payroll reports and quarterlies) to HUB each time you enable report delivery for a client. You will need to remotely log in to the server in order to run the utility. Visit the Start Menu and find the "Shugo FGX Execupay Historical Report Importer" and open it.



2. **Processing Historical Reports:** Upon opening the import utility, you will see a list of companies you have turned on Shugo report delivery for. Select each company you would like to post historical reports for. Please note by default the import utility is set to send two years worth of both historical payroll and quarter end reports. If desired, use the Report Type and Choose Range sections to make changes. Hit "Process" when you're ready and the selected client list's history will now be available within the "History" menu of HUB!