

IMS PAYROLL

IMS Online User Guide

Installing
IMS Online

POWERED BY

The logo for TimeFiler, featuring the text "TimeFiler" in a bold, sans-serif font. The word "Time" is in blue and "Filer" is in grey. Above the text are five small dots of varying sizes and colors (blue, grey, blue, grey, blue) arranged in a slight arc.

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Installation



To help prevent the CD from cracking when extracting it from its case, open the case and press down on top of the spindle (middle of CD). The CD will be released.

Prerequisites

- Ensure that IMS Payroll is closed before installing IMS Online.
- Your IMS Payroll version must be v3.70 (or later). Please contact Support if you require a new version.

Installation

- Place the CD in the CD drive. After a few seconds, the installation process will start automatically.



If installation does not start automatically, access the CD via My Computer – Explore, and double click **Setup.exe**

- Step through each window to install IMS Online.



Ensure that the destination folder for IMS Online is the same folder in which your IMS Payroll application is held (by default, c:\Program Files\IMS\IMS Payroll Partner)

IMS Online set-up

After installing IMS Online, please carry out the following tasks within IMS Payroll for each payroll company to be accessed online:

‘Company Controls – Company’ tab

Activate IMS Online

- In the IMS Online section, tick the **Active** checkbox to activate IMS Online:

The screenshot shows the 'Company Controls - Company' tab in the IMS Payroll Partner software. A blue arrow points to the 'IMS Online Active' checkbox, which is checked. The interface includes fields for company name, address, contact person, and various options like 'Costing Required?' and 'Sick Leave in Advance?'.

- Fill in a default Holiday Group that will be assigned to employees when your IMS Online database is created for the first time. It is possible to override individual Holiday Groups on the employee masterfile record (see page 8 of this document).

What is a holiday group?

Holiday Groups are assigned to employees, and they determine when public holidays fall.



If your organisation pays employees in one geographical location, then you will use a single Holiday Group.

If your employees are spread throughout New Zealand, then you will use multiple Holiday Groups. Choose a default Holiday Group that will be applied to all employees in the first instance (also for new employees going forward). Variations to Holiday Groups can then be applied at employee masterfile level in IMS Payroll, which will then be synced to IMS Online.

What is the difference between Monday to Friday, and Monday to Sunday holiday groups?

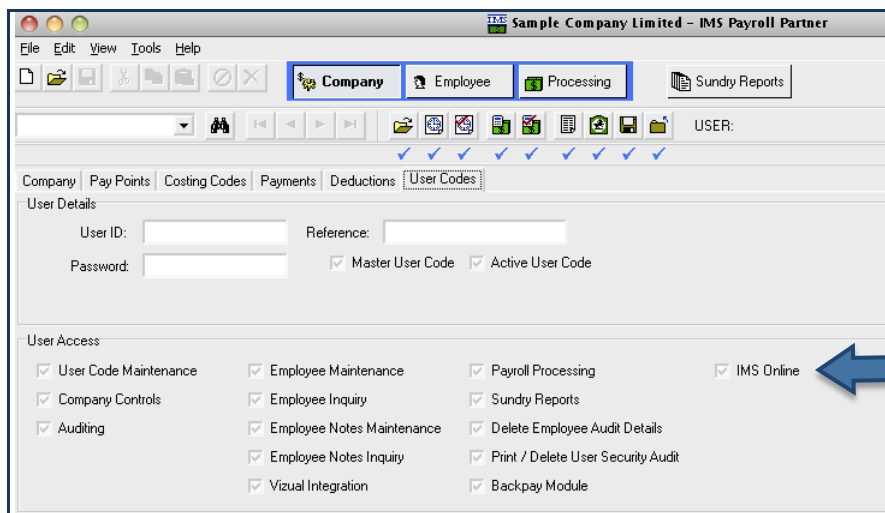
Use Monday to Friday for employees who work normal week days, and who would have allowable public holidays “Monday-ised”



Use Monday to Sunday for employees who work variable shifts, and who would have the public holiday on the day in which it falls (ie not “Monday-ised”).

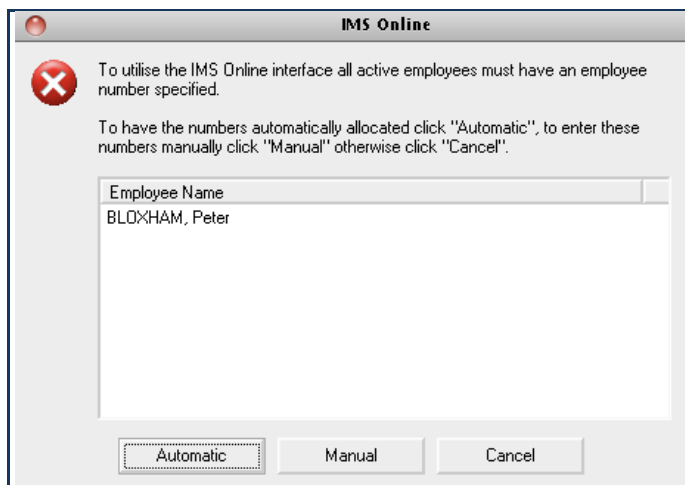
There are times however where the day is observed on the day it falls (especially Christmas and New Year public holidays). Functionality available from Christmas 2010 in IMS Online Plus and Max will ensure that the system works out whether the public holiday is applied on the day on which it falls or on the following Monday or Tuesday.

- Fill in the e-mail address that will be used for employee payroll notifications from the IMS Online ‘My Details’ page.
- Once IMS Online has been activated, a new IMS Online field is shown on the Company User Codes tab (if user security has been activated for the company). This enables access to IMS Online:



Check for unique employee codes

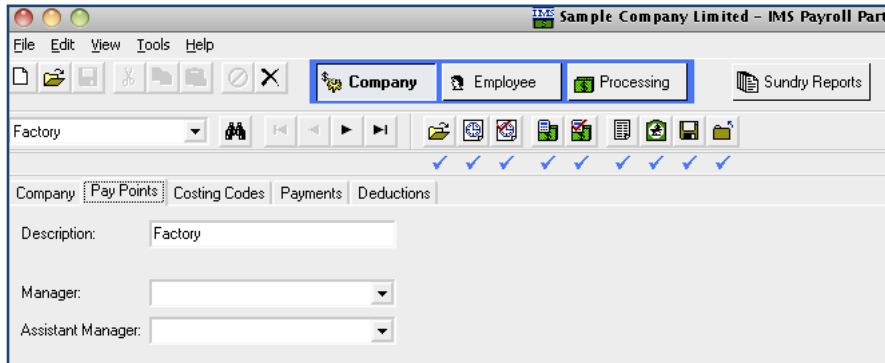
- All active employees must have a unique user-defined employee number (as stored on the 'Employee Information – Standard tab' (Emp# field).
- After activating IMS Online and saving company settings, a check will be made to ensure all active employees have an employee number assigned.
- If this is not the case, a window will be shown listing all employees without an employee number:



- **Automatic** – click this button to automatically assign an employee number to the listed employees
- **Manual** – click this button to return to the Company tab. You need to assign employee numbers manually (note that the IMS Online Active checkbox is unticked; you cannot save this setting until all employee number issues have been addressed).
- **Cancel** – click this button to return to the Company tab. Note that the IMS Online Active checkbox is unticked; you cannot save this setting until all employee number issues have been addressed.

'Company Controls – Pay Points' tab

Manager and Assistant Manager details may be assigned against Pay Points on the Company Controls – Pay Points tab:



What is a Manager?



If you use Leave Requests in IMS Online, a Manager will receive e-mail alerts and will have access to all employees in Pay Points (Work Areas) for which they are linked to as a Manager.

What is an Assistant Manager?



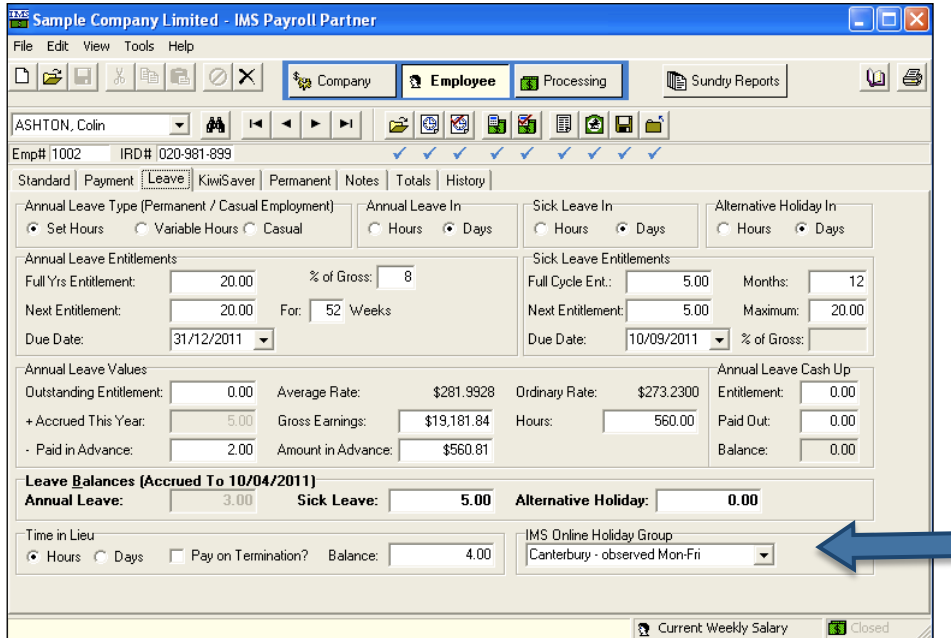
Similar to a Manager, except an Assistant Manager receives a copy of the Leave Request e-mail alert which is sent to the Manager.

Only current employees may only be assigned as a Manager or Assistant Manager.

If a termination date is entered for an employee who is assigned as a Manager or Assistant Manager, a warning will be displayed, and they will be automatically removed from the Pay Point(s). This means that a new Manager and/or Assistant Manager will need to be assigned to the Pay Point.

'Employee Information – Leave' tab

- After activating IMS Online, a new employee field called Holiday Group will be present on the employee masterfile:



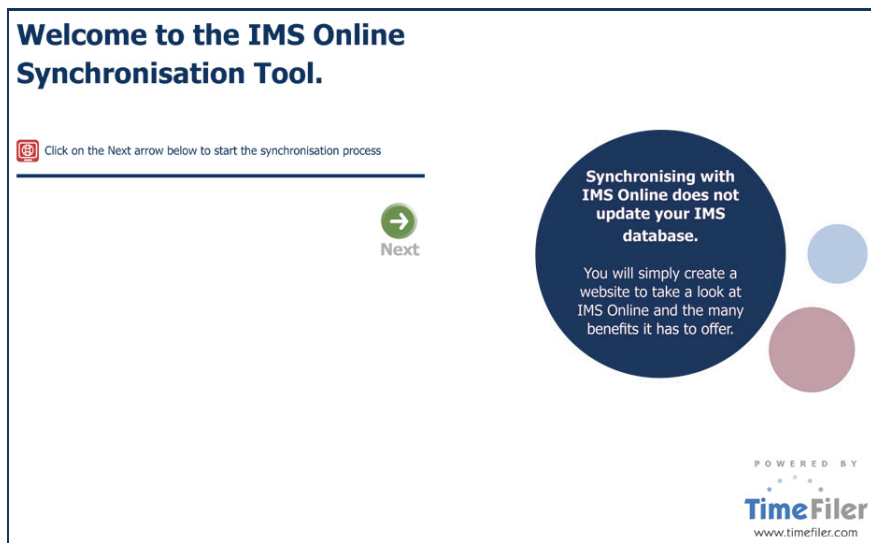
- By default, it contains the default Holiday Group as specified when setting up IMS Online.
- Change the Holiday Group at individual level for employees working at a different geographical region.

Create IMS Online database

Create database

All you have done so far is get everything ready for your IMS Online database. You are now ready to create IMS Online for your company!

- From the IMS Payroll Tools menu, select 'IMS Online'.
- You will be presented with the following screen:



- Click **Next**. The following screen will be displayed:

Signup

I already have an existing IMS Online website

[Suggest](#) [Check](#)

Website name :

This helps decide the web address of your company

Product Express Max

Username :

Password : 5 minimum

Confirm Password :

I accept the IMS Online [terms of use](#)

Create Website

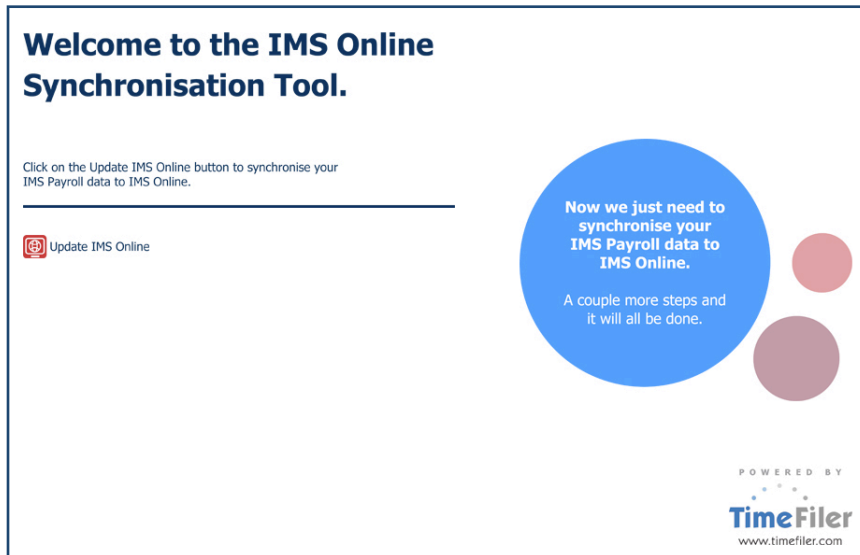
Item	Explanation
I already have an existing IMS Online website	Tick this box if an IMS Online database already exists for your company. Usually this checkbox would be left unticked.
Website name	Click the Suggest button to have the system generate a name based on your company name stored in IMS Payroll. Alternatively, type a website name into the Website Name field. The URL will generate underneath so you can see the full link. Click Check to make sure this website name isn't already in use.
Product	Please select either Express or Max. Important Note: <i>Select Max if you have purchased IMS Online with timesheets; otherwise select Express (leave requests only).</i> If you create your database with the wrong option, it is likely that the database will need to be deleted, and you will need to re-start the synchronisation process. Note that Max incurs a monthly license fee. Please call IMS Support if you are unsure which product you have purchased.
Username	Make sure you select a secure user name. It is case sensitive.
Password	Make sure you enter a strong password, for example, it should include upper and lower case letters, as well as numbers. It is case sensitive.
Confirm Password	Enter the password again as entered into the Password field.
Accept Terms of Use	Click on the Terms of Use link to read terms for the use of IMS Online, and then tick the checkbox to indicate your acceptance of the terms.

- Click on the **Create Website** button.
- When completed, a window will appear letting you know that your IMS Online database has been successfully created.
- If the IMS Online database creation was not successful, please contact IMS Support on 06 876 8959.
- Press **OK** to proceed.

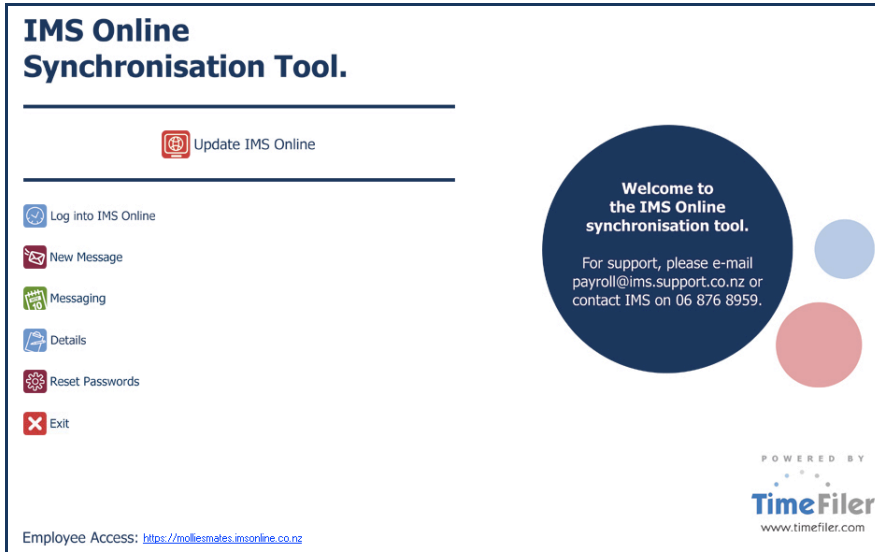
Synchronise IMS Payroll data to IMS Online

Although you have created the IMS Online database with your company name, you haven't yet synchronised IMS Payroll data to the database.

After pressing OK in the step above, you will be presented with the following screen:



- Click **Update IMS Online**.
- IMS Payroll data is now being synchronised with IMS Online.
- This process may take a few minutes depending on the size of your IMS Payroll data. A progress bar is displayed at the bottom of the screen.
- When completed, a window will appear letting you know that your IMS Online synchronisation has been successful.
- If the IMS Online database synchronisation was not successful, please contact IMS Support on 06 876 8959. Please copy and paste the audit log for their information.
- Press **OK** to proceed. The following screen will be displayed:



This is the same screen that will be shown when subsequently accessing IMS Online via the Tools menu in IMS Payroll.

To find out more about the IMS Online Synchronisation Tool, please refer to the “IMS – IMS Online Synchronisation Tools” document.

Generating Payslips from IMS Payroll

How are payslips sent to IMS Online?

When IMS Online is activated, payslips will be automatically sent to IMS Online (after the 'Update IMS Online' process is run).



Sometimes, you may want to regenerate just online payslips to IMS Online. Refer to the following section for more information.

Regenerating online payslips

When IMS Online is activated, there is an option available in the Payslip reporting options called 'Only Online Payslips':

The screenshot shows the 'IMS Payslip - Report Options' dialog box. It contains several sections: 'Sort Order' with radio buttons for 'Employee Name', 'Employee Number', 'Pay Point then Employee Name', and 'Pay Point then Employee Number'; 'Print Range' with 'All' and 'Range' options and dropdowns for 'From: Pay Point', 'Employee', 'To: Pay Point', and 'Employee'; 'Show Figures for:' with checkboxes for 'Annual Leave Outstanding?', 'Annual Leave Accrued?', 'Annual Leave Balance?', 'Sick Leave Outstanding?', 'Alternative Holidays?', 'Time in Lieu?', 'Apprentice Hours?', 'Outstanding Deduction Balances?', and 'KiwiSaver Employer Contribution?'; and 'Printing Options:' with checkboxes for 'Window Envelope?', 'Compressed Layout?', 'IMS Laser Payslips?', 'E-mail Payslips?', 'Only Online Payslips?', 'IMS Impact Payslips?', 'Only if Nett Different?', 'Coinage Analysis?', 'Bank Account Details?', 'Hourly Earnings Descriptions?', 'Annual Salary?', 'Tax Code?', 'IRD Number?', 'Transaction Dates?', 'Transaction Comments?', 'Zero Rated Leave?', and 'Zero Rated Ord. Hours?'. A blue arrow points to the 'Only Online Payslips?' checkbox.

This option is useful if you wish to regenerate online payslips only.

If a recalculation is required after payslips have been generated, then payslips generated previously will be updated after re-running the payslips report.

Payslips will be sent to IMS Online after the following steps have been taken:

- Pay period has been closed (or, after payslip generation if the payslips were generated after pay period close)
- Payslips will be sent to IMS Online after running the 'Update IMS Online' tool.

What next?

Read the 'Getting Started' Guide

If you are using IMS Online Express, please ensure you read the 'Getting Started' guide available on the IMS Online page of the IMS Payroll website.

Payslips & Messaging

Employees can now start using IMS Online to view payslips and reports.

Remember to provide employees with the URL as per what you specified during the database creation stage. Note that the employee URL is shown on the IMS Online Synchronisation Tool home page for your information.

- Employee login name is the IMS Payroll employee number
- Employee password is their IRD number, as stored in IMS Payroll



Employees should change their password to a more secure password upon initial login.

Leave Requests

You can start using the Leave Request module straightaway. Employees may apply for leave online, and e-mails will be generated to their manager for approval.

Refer to the "IMS Online Administrator Guide" document for further information.

Timesheets

Please discuss your timesheet requirements with your TimeFiler consultant so that your system can be configured to suit your requirements.