



Start-up Guide

Before using this guide, you need to have an Easystub account registered with Easypay. If you would like to sign-up for Easystub, please call the Easypay sales line at **1-800-270-0075**. When you open an Easystub account, you will be given an Easystub Company ID and instructions on how to activate the Easystub feature in Easypay Payroll.

Once the Easystub feature is activated in your Easypay system, you can use this guide to complete the set-up process. This guide also describes how to log into your Easystub account and upload your first pay stub file to the Easystub web site.

Please note: The Easystub options in Easypay Payroll that are referred to in this guide are not displayed or accessible until the Easystub feature has been activated in Easypay.

Table of Contents

Employee Easystub Activation.....	3
Updating Individual Employees.....	5
Printing Employee Instructions.....	6
Logging into Easystub.....	7
Creating an Easystub File.....	11
Uploading an Easystub File.....	12
Easystub Menu Options.....	14

Employee Easystub Activation

After activating the Easystub feature in Easypay, you need to indicate which employees will be participating in Easystub. This is done by turning on the **Easystub** option in the employee profiles. The quickest way to do this is by using the Employee Update Utility:

1. Go to **Edit > Employee > Update Utility**.
2. Set the **Item to be updated** to **Easystub**.
3. Turn on the **Include employee in Easystub** check box.
4. Click the **Next** button at the bottom of the window.

Here is how the Employee Update Utility window should look:

Employee Update Utility

Employees to Include

All By code By name

From:

To:

Status: Active On Leave Terminated

Pay Type:

Frequency:

Departments to Include

All From a list By code

1 - DEPARTMENT ONE

2 - DEPARTMENT TWO

3 - DEPARTMENT THREE

4 - DEPARTMENT FOUR

5 - DEPARTMENT FIVE

Details

Item to be updated:

Include employee in Easystub

Help

- After you click **Next**, a new window will be displayed showing you the changes that will be made. The **New** column will show that the Easystub option will be turned on for all employees. If there are any employees that you don't want included in Easystub, turn off the **New** check box for those employees.

The screenshot shows a window titled "Employee Update Utility" with a table of employee records. The table has columns for Code, Name, Dept, Status, Easystub (Old and New), and Update. The Easystub 'New' column contains checked boxes for all 13 employees listed. Below the table, there are summary statistics and control buttons.

Code	Name	Dept	Status	Easystub		Update
				Old	New	
1	SMITH JOHN	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	JOHNSTON JANET	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	WONG HENRY	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	PATEL RAJ	2	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	GOLDBERG SAMMY	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	VITTORIO ANTHONY	3	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	PETRONIS MELANIE	5	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	ARMSTRONG ELANA	5	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	SUZUKI KAREN	4	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	SAMUEL LEROY	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	MERCER RAY	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12	PETROVIC SUSAN	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14	TARLEK HERBERT	1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Total records... 13 To be updated... 13 All None

Buttons: Help, Print, Save Changes to File, < Back, Cancel

- When you are ready to update the employee file with these changes, click **Save Changes to File**.

The selected employees will now have the Easystub option turned on in their employee profiles and will receive their pay stubs via Easystub.

Updating Individual Employees

As an alternative to using the Employee Update Utility to turn on the Easystub option for an employee, you can simply turn on this option in the **Banks** tab of their Employee Profile:

1. From the Easypay menu, select **Edit > Employee > Profile**.
2. Click the **Banks** tab.
3. Turn on the **Include employee in Easystub** check box.
4. Click **Apply** or **OK**.

Please note: Employees must have a valid SIN number before the Easystub option can be turned on in their Employee Profile. (The temporary SIN number 999-999-998 is not considered a valid SIN number.)

The screenshot shows the 'Edit Employee Profile' window for 'SMITH JOHN - Active'. The 'Banks' tab is selected. A red arrow points to the 'Include employee in Easystub' checkbox, which is checked. The window also shows fields for Bank Information, including Institution Number, Transit/Branch No., Account Number, % of Deposit, Fixed Amount, and Remaining Funds.

	Account 1	Account 2	Account 3	% Total
Institution Number	0001			
Transit/Branch No.	01234			
Account Number	555123			
% of Deposit	100.00			100.00
Fixed Amount				
Remaining Funds	<input checked="" type="checkbox"/> To Account 1	<input type="checkbox"/> To Account 2	<input type="checkbox"/> To Account 3	
Description (optional)				

Printing Employee Instructions

After you have uploaded the first Easystub file for your company, you will need to give your employees instructions on how to access their pay stubs on the Easystub web site.

In Easypay, select **Reports > Print Employees > Easystub Instructions**. This report allows you to print one page of instructions that is customized for each employee. It provides an introduction to Easystub and instructions on how to log into their Easystub account.

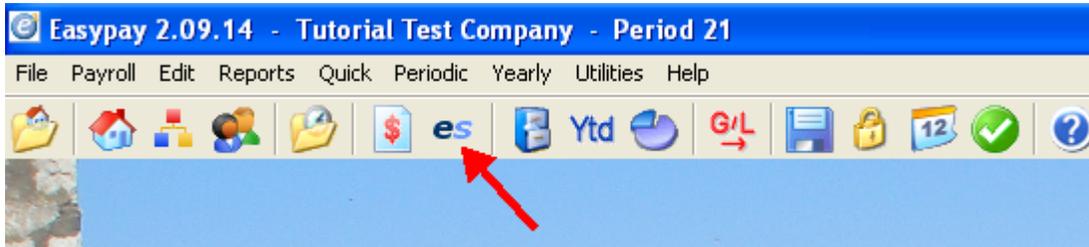
The screenshot shows a dialog box titled "Employee Easystub Instructions". It features a blue title bar with a close button. The main area contains several configuration options: "Sort by" with radio buttons for "Employee code" (selected), "Employee name", and "Department + Name"; "Status" with checkboxes for "Active" (checked), "On Leave", and "Terminated"; "All employees" (selected) and "Employee range" with "From" and "To" input fields and search icons; "Print the employee's default password" (unchecked) and "Exclude employees that are not included in Easystub" (checked). At the bottom are "Help", "Setup", and "Cancel" buttons, along with printer, magnifying glass, and document icons.

An employee's initial password is the **last five digits** of their SIN number. By default, passwords are not printed on this report. If you prefer to have the passwords printed, turn on the **Print the employee's default password** option.

Please note: Your employees will not be able to log into their accounts until after their first pay stub is posted to their account. We recommend that you wait until after the first Easystub file has been uploaded before giving your employees instructions for accessing Easystub.

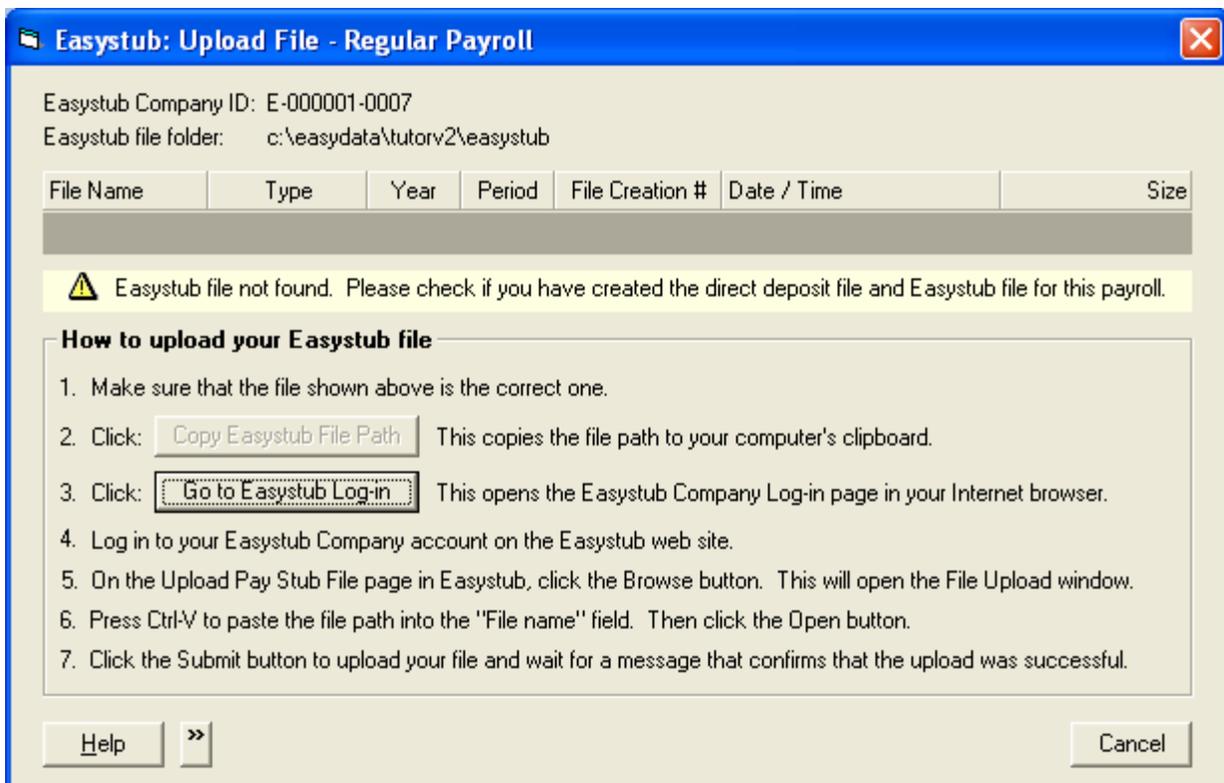
Logging into Easystub

When the Easystub feature is turned on in Easypay, a new **es** icon is displayed in the Easypay menu bar. This icon is a shortcut to the **Easystub: Upload File** window.

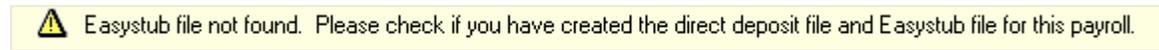


You can also access the **Easystub: Upload File** window by selecting **Payroll > Cheques/Deposit > Easystub Upload**.

Click the **es** icon now to display the **Easystub: Upload File** window:



The **Easystub: Upload File** window displays the most recent Easystub file that was created in Easy pay. If an Easystub file has not yet been created, an “Easystub file not found...” message is displayed:

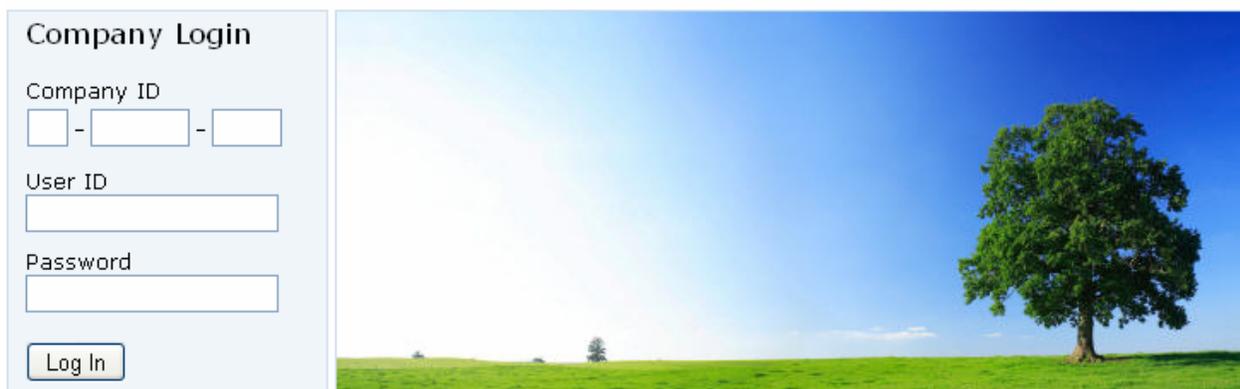


If you have not yet created an Easystub file, you can ignore this message.

Click the **Go to Easystub Log-in** button. Clicking this link will display the Easystub Company Login page in your Internet browser.

easystub

[About](#) | [Help](#)

A screenshot of the Easystub Company Login page. On the left is a light blue sidebar with the title "Company Login". Below the title are three input fields: "Company ID" (with a dashed line separator), "User ID", and "Password". A "Log In" button is at the bottom of the sidebar. To the right of the sidebar is a large image of a green field with a single large tree under a blue sky.

Enter the Easystub Company ID into the **Company ID** field. This is the ID number that was given to you during the Easystub registration process.

The first time that you log in, the **User ID** and **Password** are equal to the Company ID without the dashes.

- For example, Company ID E-000001-0007 would be entered as E0000010007 in the User ID and Password fields.

The easiest way to do this is to type in the **User ID** and then copy and paste it into the **Password** field. If you are not comfortable with copy & paste, then type the **Company ID** into both the **User ID** and the **Password** fields (without the dashes).



Company Login

Company ID
E - 000001 - 0007

User ID
E0000010007

Password
●●●●●●●●

Log In

Easystub - Company Admin Login

User Agreement

After you have successfully logged in with the default User ID and Password, you will be asked to read and accept the **Easystub Agreement**. It is important that you read and understand this agreement before accepting its terms.

Reset Your Username and Password

After the agreement is accepted, the **Change Password / User ID** page will be displayed. A message will be displayed asking you to enter a new Username and Password.

Please note:

- User ID and Password are case sensitive
- User ID and Password must be at least 5 characters long
- Pick a password that is difficult to guess by using a combination of case-sensitive letters and numbers

1. Type in a new User ID in the **New User ID** field and click the **Save User ID** button.

2. Enter your new Password in the **New Password** field and also in the **Re-enter Password** field and click the **Save Password** button.
3. Log out and then log in with the new User ID and Password that you have just set up. If you have any problems logging in, please call Easy pay Support at **(905) 825-8020** for assistance.

easystub

E-000001-0007

[Logout](#)

[Change Password](#)

[Help](#)

**You have logged in with your default password.
Please reset your username and then password to
continue.**

Company ID: E-000001-0007
Tutorial Test Company

Company Administration	Change Password / User ID	
Upload Pay Stub File	Old User ID	E0000010007
Edit Company	New User ID	<input type="text"/>
Manage Employees		<input type="button" value="Save User ID"/> <input type="button" value="Cancel"/>
Manage Pay Stubs	New Password	<input type="password"/>
Monitor Activity	Re-Enter Password	<input type="password"/>
Fees Report		<input type="button" value="Save Password"/> <input type="button" value="Cancel"/>
Logout		

Enter Company Information

After you have logged into Easystub, select **Edit Company** from the Easystub menu on the left side of the page. Please make sure that your company information is complete, especially your **contact name, phone and email address**.

If you have more than one Easystub company, we recommend that you enter a **Company Reference** for each company to help identify your different companies.

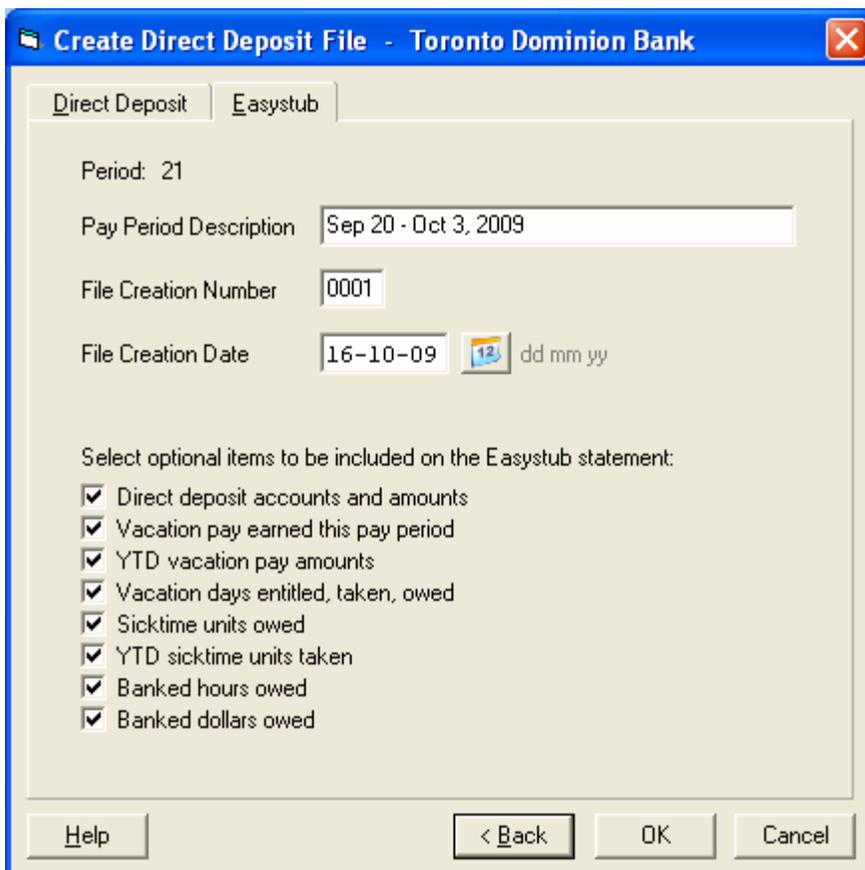
For more details about the Edit Company page, please refer to the on-line help by clicking **Help** at the top right of the Easystub page.

Creating an Easystub File

The **Easystub file** is created when you create your **Direct Deposit file**.

1. When you are ready to create your direct deposit file, go to the **Create Direct Deposit File** window and enter the information on the **Direct Deposit** tab as you normally do.
2. Click the **Easystub** tab or **Next** button.
3. On the Easystub tab:
 - Enter a **Pay Period Description** (optional)
 - Enter the **File Creation Date** (the current date)
 - Select the optional items to be included on the Easystub stubs

Note: The File Creation Number is automatically filled in and does not usually need to be edited. This number must be unique for each Easystub file that is uploaded for a given company.
4. Click **OK**. The direct deposit file and the Easystub file will be created.



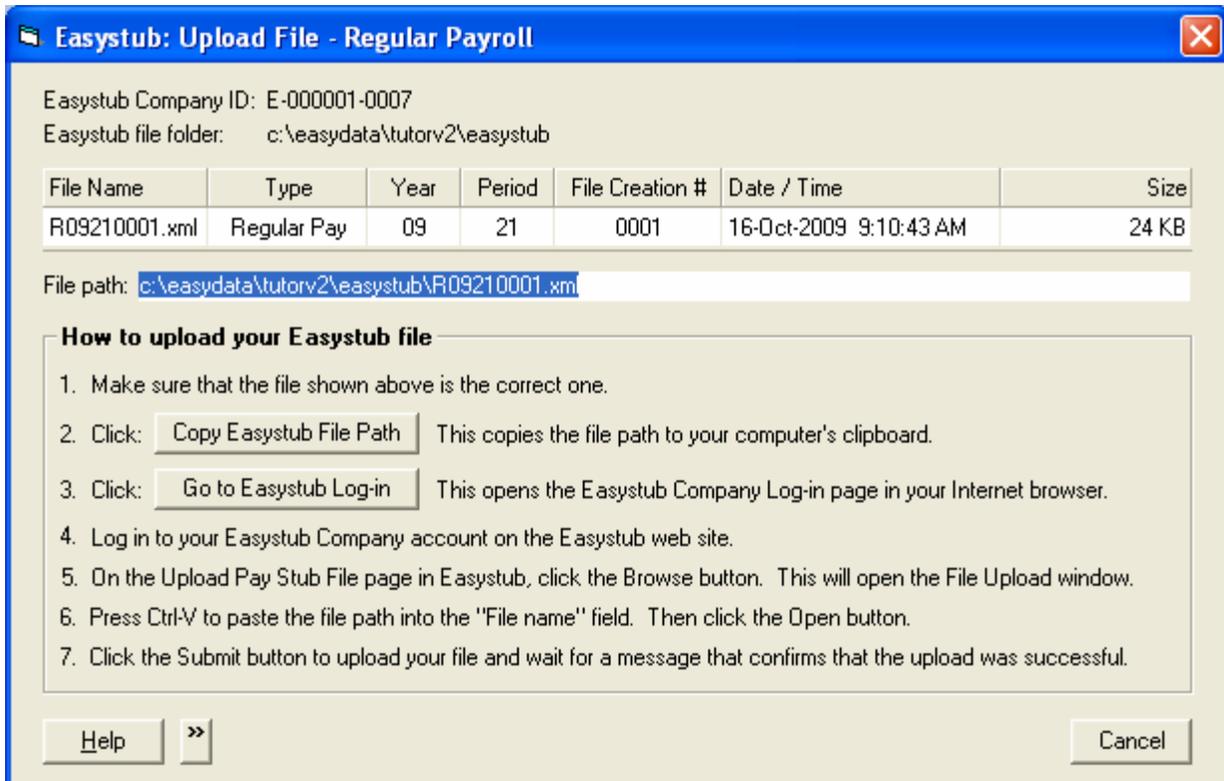
The screenshot shows a dialog box titled "Create Direct Deposit File - Toronto Dominion Bank" with a close button (X) in the top right corner. The dialog has two tabs: "Direct Deposit" and "Easystub", with "Easystub" selected. The "Easystub" tab contains the following fields and options:

- Period: 21
- Pay Period Description: Sep 20 - Oct 3, 2009
- File Creation Number: 0001
- File Creation Date: 16-10-09 (with a calendar icon and "dd mm yy" label)
- Select optional items to be included on the Easystub statement:
 - Direct deposit accounts and amounts
 - Vacation pay earned this pay period
 - YTD vacation pay amounts
 - Vacation days entitled, taken, owed
 - Sicktime units owed
 - YTD sicktime units taken
 - Banked hours owed
 - Banked dollars owed

At the bottom of the dialog are four buttons: "Help", "< Back", "OK", and "Cancel".

Uploading an Easystub File

1. Click the  icon in the Easypay menu bar. This will display the **Easystub: Upload File** window and the details of the current Easystub file:



2. Click the **Copy Easystub File Path** button. This will copy the Easystub file path to your computer's clipboard.
3. Click the **Go to Easystub Log-in** button. This will display the Easystub Company Login page in your Internet browser.
4. Log into your Easystub Company account. After you log in, the **Upload Pay Stub File** page will be displayed:

Company Administration	Upload Pay Stub File
Upload Pay Stub File	Easystub XML File <input type="text"/> <input type="button" value="Browse..."/>
Edit Company	<input type="button" value="Submit"/>
Manage Employees	
Manage Pay Stubs	
Monitor Activity	Most Recent File Submitted
Fees Report	Submission Date:
Logout	File Name:
	File creation #:
	File status:
	Total stubs:
	Reg./Quick:

5. Click the **Browse** button beside the **Easystub XML File** field. This will open the **File Upload** window.
6. In the **File Upload** window, you have two options: You can either paste the file path into the **File name** field, or manually select the file from the correct folder:

To paste the file path:

(You can use this method if you clicked the **Copy Easystub File Path** button in the **Easystub: Upload File** window.) Make sure that your cursor is in the **File name** field and then press **Ctrl-V** on your keyboard (hold down the **Ctrl** key and press **V**).

To manually select the file from a folder:

1. Use the controls in the **File Upload** window to navigate to the correct folder and then select the file to be uploaded.
2. Click **Open** at the bottom of the **File Upload** window. This will open the specified file and close the **File Upload** window.

3. On the **Upload Pay Stub File** page, click **Submit** to upload the file.
4. Do not close or leave the Upload page until a message is displayed that confirms the file has been successfully uploaded.

After you have successfully uploaded the file, your employees will be able to log into their accounts and access their pay stubs.

Easystub Menu Options

The following is a quick overview of the Easystub menu options. For more information, please refer to Easystub's on-line help by clicking the Help link in the top right of the page.

Upload Pay Stub File

The **Upload Pay Stub File** page is used for uploading files. It also contains information on the most recent file that was uploaded.

easystub jennifer [Logout](#) [Change Password](#) [Help](#)

Company ID: E-000001-0007
Tutorial Test Company

Company Administration	Upload Pay Stub File
Upload Pay Stub File	Easystub XML File <input type="text"/> <input type="button" value="Browse..."/>
Edit Company	<input type="button" value="Submit"/>
Manage Employees	
Manage Pay Stubs	
Monitor Activity	Most Recent File Submitted
Fees Report	Submission Date: 16 Oct 2009 12:52:42 PM
Logout	File Name: R09210001.xml
	File creation #: 0001
	File status: OK
	Total stubs: 8
	Reg./Quick: Regular Payroll

Edit Company

The **Edit Company** page allows you to enter and edit your company and contact information. Please keep this information up-to-date – especially your **Contact Email** address.

This page also allows you to upload an optional **Company Logo** that will appear on your employee pay stubs. The maximum size allowed for the logo image is 160w x 120h pixels. A JPEG file works well and provides sufficient quality for this size. For instructions on how to upload a logo, please refer to Easystub’s on-line help.



jennifer

[Logout](#)

[Change Password](#)

[Help](#)

Company ID: E-000001-0007
Tutorial Test Company

Company Administration

Edit Company

[Upload Pay Stub File](#)

[Edit Company](#)

[Manage Employees](#)

[Manage Pay Stubs](#)

[Monitor Activity](#)

[Fees Report](#)

[Logout](#)

Company ID

E-000001-0007

Client Name

Tutorial Test Company

Company Reference

Easystub Test Company

Company Name
(from last XML file)

Tutorial Test Company

Contact Name

Jennifer Casale

Contact Phone

905 - 825 - 8020 Ext.

Contact Fax

905 - 825 - 9660

Contact Email

support@easypay.ca

Company Logo

estub_tutor.gif

Company Logo:



Max. size: 160w x 120h (pixels)

Manage Employees

The **Manage Employees** page displays a list of employees that can be searched by **Employee ID** or **Name**.

The **Edit** link beside an employee allows you to **reset their password**. When you reset a password, the password is set to the last five digits of the employee's Social Insurance Number.

The **View Stubs** link displays a list of all of the stubs in the Easystub system for the selected employee. You can then view or print any of the stubs that are listed.

easystub jennifer [Logout](#) [Change Password](#) [Help](#)

Company ID: E-000001-0007
Tutorial Test Company

Company Administration Manage Employees

[Upload Pay Stub File](#) Employee ID

[Edit Company](#) Name

[Manage Employees](#)

[Manage Pay Stubs](#)

[Monitor Activity](#)

[Fees Report](#)

[Logout](#)

Edit	View Stubs	ID	Name
Edit	View Stubs	1	SMITH JOHN
Edit	View Stubs	2	JOHNSTON JANET
Edit	View Stubs	3	WONG HENRY
Edit	View Stubs	4	PATEL RAJ
Edit	View Stubs	5	GOLDBERG SAMMY
Edit	View Stubs	6	VITTORIO ANTHONY
Edit	View Stubs	7	PETRONIS MELANIE
Edit	View Stubs	8	ARMSTRONG ELANA

1 to 8 of 8

Manage Pay Stubs

The **Manage Pay Stubs** page allows you to view the stubs in previously uploaded files.

Click the **View** link to display a list of all of the stubs that were uploaded in a particular file.

If an Easystub file is posted in error it can be deleted. Individual pay stubs may also be deleted. **CAUTION:** Please use the delete feature with caution. When deleting individual pay stubs it may be advisable to print a hard copy first. For more information, please refer Easystub's on-line help.

easystub jennifer [Logout](#) [Change Password](#) [Help](#)

Company ID: E-000001-0007
Tutorial Test Company

Company Administration	Manage Pay Stubs
Upload Pay Stub File	Most Recent File Submitted
Edit Company	Submission date: 16 Oct 2009 12:52:42 PM
Manage Employees	File name: R09210001.xml
Manage Pay Stubs	File creation date: 16 Oct 2009
Monitor Activity	File creation #: 0001
Fees Report	File status: OK
Logout	Total stubs: 8
	Reg./Quick: Regular Payroll

Delete	View	File Creation #	Submission Date	Stubs	Reg./Quick	Status
<input type="checkbox"/>	View	0001	16 Oct 2009 12:52:42 PM	8	R	OK

[Delete Selected Items](#) 1 to 1 of 1

Monitor Activity

The **Monitor Activity** page is a log of the user activity in the Easystub system. The main purpose of this feature is to maintain an audit trail of key activity and potentially detect fraudulent activity.

Fees Report

The Easystub fee is calculated when an Easystub file is created. The fee is automatically added as a separate payment to the direct deposit payroll file (under the name "Easystub") and is debited from the employer's bank account during the direct deposit process. The amount of the fee is printed on Easy pay's **Direct Deposit Register**.

The **Fees Report** in Easystub allows you to print a statement of Easystub fees incurred over a specified time period. For example, you may want to print a monthly or quarterly report for GST/HST input credits.

Please note: This report can only include fees that were incurred within the past 12 months.



Tutorial Test Company

123 Any Street
Suite 100
Toronto, ON L6M 2B2

Company ID: E-000001-0007
Reference: Easystub Test Company
GST/HST#: R105564389

Easystub Fees

For the period October 1, 2009 to October 31, 2009

Report date: October 19, 2009

Submitted	File name	Stubs	Flat Fee	Stub Fee	Subtotal	GST/HST	Total
16 Oct 2009	R09210001	8	5.00	0.40	5.40	0.27	5.67
		-----	-----	-----	-----	-----	-----
		8	5.00	0.40	5.40	0.27	5.67

Help

Easystub has extensive on-line help. To access the help, click the **Help** link in the top right corner of the Easystub page.



Easystub Help

Your Account

[Logging in](#)
[Logging out](#)
[Changing your User ID](#)
[Changing your password](#)
[Forgot your password](#)
[Problems](#)
[Protecting your Easystub Account](#)

Company Administration

[Upload Pay Stub File](#)
[Edit Company](#)
[Manage Employees](#)
[Manage Employees > Edit](#)
[Manage Employees > View Pay Stubs](#)
[Manage Pay Stubs](#)
[Manage Pay Stubs > View](#)
[Monitor Activity](#)
[Easystub Fees Report](#)

Change Password

If you need to change your User ID or Password, click the **Change Password** link in the top right corner of the Easystub page. If you forget your password or are unable to log in, please call the Easypay hotline at (905) 825-8020.

Logging Out

When you have fished your Easystub session, it is very important that you remember to log out. This is essential to help ensure the security of the system.