

virtual @PayrollAssistant

Guide - EOY 2025

March 2025

IRIS. Look forward

Contents

Introduction	2
What is virtual Payroll Assistant (vPA)?	3
In more detail	
What software is involved?	
What automated steps are available?	4
What approval steps are available?	5
Terminology	6
vPA Roles	7
vPA website	10
Login to vPA website	
Dashboard page	
My Work	11
Automated	11
Overview	12
Client Approvals	13
Left-Menu items	14
Auto Logout	
Configuring vPA	
How to set up a Group based on pay day	
Setting up a new group	
Group set-up wizard – step 1	17
Group set-up wizard – step 2	
Group set-up wizard – step 3	
Group set-up wizard – step 4	19
Customising the group 'base settings':	
Customising steps in a Group Process	
Add, disable, delete and re-order the steps	
Editing the step Timetable	
Edit the DPS Check step	
Edit the Empty Outbox step	
Edit the Create Report step	
Assign specific users to Manual steps	
Pooled manual steps	
Assigning user at Group level	31
Assigning user at Group Client level	
Assigning user at Group Process level	
Assigning user at Group Process Step level	
Assigning user at Group Client Process level	
Assigning user at Group Client Process Step level	
Assignment overview	37
Assign user to Internal approval steps	38
Assign user at Group Process Step level	39
Assign user at Group Client Process Step level	
Assign user to Close Year step created by Close Run step	
Override Client's pay day	41

Customize the Client Approval step	43
Group Process Step level	
Group Client Process Step level	
Mark specific steps for a Client that are not applicable.	
Override the Client's publish date for Payslips and/or Documents	
Preview process schedule prior to initiating	
Initiating the Process schedule for live usage	
Editing existing groups	
How to add a Client to an existing group	
How to disable a Client in an existing group	
How to reactivate a Client in an existing group	
Modifying the steps	
How to delete an unused Process from an existing group	
How to set up Teams	
Team page	
Add a team	
Deleting a Team	
Disabling a Team	
Removing user from a Team	
Adding a User to a Team Adding a Group to a Team	05
Changing a Team allocated to a Group	
Removing a Team from a Group, or a Group from the Team	
Advanced Filters	
Groups page	
New Group Wizard	
Group Edit	68
Process Progress page	
Planned Processes page	
Month View page	
Step Progress page	
Planned Steps page	
vPA Dashboard	/2
Using Payroll Professional and vPA day-to-day	74
vPA website	74
System Alerts	74
Monitoring progress	74
How to customise the Low, Medium and High Calendar colours	75
How to see when a client's payroll was started and completed	76
How to deal with automated step warnings	
Calculate	
Create FPS	
Send FPS	70
Empty Outbox	
Close Run	
Open Run	
How to deal with step failures	
All steps	
Automated steps	
Initialise Process	81
DPS Check	81
Calculate	
Create FPS	81
Send FPS	
Create Report	
Empty Outbox	
• •	

How to use emergency override for a failed automated step	
How to rerun process step(s) for a client	
Rerun a cancelled process	
Rerun a paused process	
How to pause a process for a client	
Resume paused process to continue from where it was paused	
Resume paused process but rerun previously completed steps	
How to cancel the current process for a client	
Cancel this and future periods	
Cancel this period only	
How to start a step or multiple steps of a process early for a client	
Assigning, reassigning and unassigning manual steps	
Via Today's Work Breakdown chart	
Via Weekly Work Breakdown chart	
Via Step Progress (left-menu)	
Via Process Progress (left-menu)	
How to search for a specific client	
How to edit steps in a current process	
All Steps – Mark as Not Applicable	
Internal approvals	
Client approvals	
Manual steps	
Empty Outbox – Publish Date(s)	
Create report	
How to view future work	
Alternative view of a client's process (Gantt chart)	
How to change the Action Required by user for a rejected Internal approval	
How to deal with rejected approvals	
How to manually check for response to Client Approval	
Does the Payroll Professional audit trail show what automated steps have done	
How to update the Clients details after converting payroll from Access to SQL	
How to see what Group a Client is attached	
How can I export the information shown in the grids	
How to change the number of rows showing in the grids	
gning off manual tasks as complete and responding to internal approvals	
Via Payroll Professional	
Signing off manual tasks	
Responding to internal approvals	
Via vPA website	
Manual tasks	
Internal approvals	
Via Step Progress	
Manual task	
Internal approval	
Via Process Progress	
Manual task	
Internal approval esponding to client approvals on the client's behalf	
Via vPA website	
Via website	
Version and Updates	
chedule checking for an update	
pdate available and scheduling installation	
pdate Process	

	146
Update Process Screen	146
Help	148
Update Process	149
Update Process – Process Payroll – Director only	149
Edit a Group - Update Process Required	149
Enabling Disabled Group – Update Process Required	150
Group grid	150
Group Edit form	150
Update Process Status	150
Enable Disabled Process – Process Update Required	150
Automated step - Create next process	151
Process Update and User Roles	151
Website	152
Server restart – Schedule Engine Shutdown	
Appendix A – Best practice process templates	
Process Payroll – Director only	
	155
Process Payroll – Monthly	155 157
	155155 155 159
Process Payroll – Monthly Process Payroll – Weekly	155 157 159 161
Process Payroll – Monthly Process Payroll – Weekly Process Payroll – Four Weekly	155 157 159 161 163
Process Payroll – Monthly Process Payroll – Weekly Process Payroll – Four Weekly Appendix B – Unsupported Elements	155 157 159 161 163 163
Process Payroll – Monthly Process Payroll – Weekly Process Payroll – Four Weekly Appendix B – Unsupported Elements Automated Step – Calculate	155 157 159 161 163 163 164
Process Payroll – Monthly Process Payroll – Weekly Process Payroll – Four Weekly Appendix B – Unsupported Elements Automated Step – Calculate Automated Step – Create FPS	155 157 159 161 163 163 164 166

Introduction

This guide assumes that the following are already in place in a client's Payroll Professional installation:

- Payroll Professional 2025 EOY Update or later is installed.
- All payroll data files opened in IPP 2025 EOY or later.
- Payroll Professional is correctly set up and using MS SQL (Express, Standard or Enterprise) for the shared databases, T2DATA and P2ADMIN.
- Virtual Payroll Assistant (vPA) installed on a separate discrete server and is configured to use the same MS SQL shared databases, and a separate MS SQL database for vPA.
- vPA configured with one mapped drive to be able to see the file path where Documents are saved so they can be uploaded to myePayWindow using the automated step Empty outbox.
- Bureau users intending to use vPA must already be registered and have activated user accounts on myePayWindow, with Privileges selected. Enable users to have access to vPA via myePayWindow.

What is virtual Payroll Assistant (vPA)?

Virtual Payroll Assistant (vPA) is a Payroll processing automation module designed for Payroll service providers and other organisations who process the pay for multiple employers or clients. vPA offers the potential, once set-up, to allow payroll tasks, normally executed from within the payroll desktop software, to be run automatically, sequentially, and fully 'unattended', i.e. without any user intervention and without the desktop software.

vPA relies upon the use of pre-defined payroll processing templates. A vPA processing template contains processing 'steps'. A processing step or task can be either 'automated' or 'manual'. Automatic processing steps will execute payroll functionality unattended whilst manual tasks need to be processed by a Payroll processor via the Payroll Professional desktop software application or based on other events that need to happen and be marked as complete before following steps can continue.

In this release of vPA there are manual and automated steps included in the processing templates. Automated steps are limited and will be increased over the course of later releases.

Using vPA to manage and track progress of payroll processing tasks across multiple employer payrolls and payroll processors will provide significant benefits (even with limited automation capability) by providing instant visibility into the status of work and control of deadlines in a typical payroll processing bureau.

In more detail....

Manual tasks can be assigned to specific staff members who are then able to **Sign Off** the task when the work has been completed. A collection of steps is defined as a **Process**. When a Manual task is completed, vPA will move on to the next step in the Process sequence and proceed until all steps have been done when the Process is then considered complete. The cycle then continues with the next iteration of the Process being created when the automated step called **Create next process** is performed.

Separate Processes (and the tasks contained within) are made for each **Client.** Multiple clients requiring the same Processes are collected to form a **Group**. The first Process is created for each Client in a Group based on the Group's Period Number and Tax year when the Schedule is changed to Ready.

What software is involved?

Virtual Payroll Assistant comprises 2 main software components that are installed alongside your existing Payroll Professional installation:

- vPA website This is where you set-up, manage and track the progress payroll processing.
- vPA engine This is a server engine that processes payroll tasks on your network.

The vPA website provides:

- The ability to create client processing Groups with process templates and steps and to tune these to the way you work.
- A Dashboard with four views My Work, Automated, Overview and Client Approvals.
 - My Work consists of the Manual and Internal Approval tasks for the user logged into the vPA website.
 - Automated is the progress of the automated steps.
 - Overview providing details of all users Manual and Internal Approval tasks.
 - Client Approvals show status of client approvals that are waiting for the client to reject or approve via myePayWindow.
- The ability to view the payroll and each users' processing progress, and most importantly to deal with any failures and overdue manual tasks.
- The ability to assign, reassign and un-assign manual tasks across your payroll team.
- The ability to rerun steps.
- The ability to sign off manual tasks.

- The ability to approve or reject Internal approvals.
- The ability to approve or reject Client approvals.
- The ability to pause a process for a client.
- The ability to cancel a process for a client.
- The ability to start step(s) early.

In addition, vPA works in an integrated way with the Payroll Professional desktop application. When vPA is installed Payroll Professional allows you to:

- See manual and internal approval tasks allocated to you via the vPA across all clients and listed in most immediately due order.
- When you open a specific data file only see your tasks for the client file that you have opened.
- Be able to sign off manual tasks as complete and for these to update automatically to the vPA website so that progress can be monitored centrally.
- Ability to Approve or Reject internal approval tasks and for these to update automatically to the vPA website so that progress can be monitored centrally.

What automated steps are available?

The following automated steps are available:

Mandatory:

- Initialise Process must be the first step in a process, it checks that the data file has the correct Frequency, Period Number and Tax Year.
- Open Run must be after close run. Where the clients process setting called Pay Day Setting is selected as Default or Specific Day, this step will set the pay date for the period in the payroll data file as the date set in vPA.
- Create Next Process must be the last step in a process, it creates the next periods process.

All types of payrolls:

- DPS Check checks whether there are any notices to download since the last notices where downloaded. If there are notices to be downloaded there needs to be a manual step after this automated step so that the user is aware that they need to manually download notices. This step allows the manual step to be skipped if there are no notices to be downloaded.
- Backup payroll use this step to backup the data file during processing, the file name is like the normal close run naming convention. Must have the Backup setup completed in Payroll Professional with Automatic selected, Compressed can be ticked or un-ticked and the back up path completed. Will use the Secure backup if set up.
- Client Approval this step is sent to myePayWindow for the client to approve or reject the payroll. Therefore, the data file must be set up on myePayWindow, payslips previously uploaded and Employer contacts set up for you to be able to use this step. You can choose one or multiple Employer contacts for this step to be sent to. If no Employer contact is selected, it will be sent to the default contact that has been set up in myePayWindow. This step includes options as to what should happen if it exceeds the due date and time, and the client has not approved or rejected the payroll. Checks for a response once every hour.
- Send FPS submits and checks the FPS that has previously been created either manually via IPP or using the automated step Create FPS. Please note that if the Employer is Opted in to EVC, when this step is performed via vPA the data is NOT send to EVC
- **Create Report** creates individual PDFs of the selected reports and adds them to the myePayWindow outbox using the Default Contact set up in myePayWindow. The report name(s) can be overridden. See Appendix C for a list of available reports.

- Empty Outbox allows you to choose the following outbox items to be uploaded to myePayWindow using publish dates (if applicable) defined under the group:
 - Payslips
 - Documents
 - Branch changes
 - Cost centre changes
 - Department changes
 - P45s
 - CIS statements
 - Anonymise employee
 - Employee changes

Depending on which outbox item(s) are selected, this step performs a check first to see if there is anything other than the selected outbox item(s) in the outbox, if this is not the case the outbox items will be uploaded to myePayWindow and like the DPS Count Check step it allows a following manual step to be skipped.

Specific types of payrolls:

- Calculate only designed to be used for Director payrolls where they have gross to net payments that only require tax and national insurance to be calculated. Is suitable for Cumulative and Non-Cumulative Directors. This step checks for unsupported elements, see Appendix B, and excludes calculated employees.
- Create FPS only designed to be used for Director payrolls where they have gross to net payments that only require tax, national insurance, student loans and postgraduate loans, attachment of earnings order, non-banded pension schemes, banded pension schemes calculated and auto enrolment. Is suitable for Cumulative and Non-Cumulative Directors. The employees first FPS must have previously been submitted before using this step. If it is determined it is the last period of the tax year and the data file only has one frequency (checks employees and payroll runs for the current tax year), then the Final Submission flag is included in the FPS. This step checks for unsupported elements, see Appendix B.
- Close Run must be before open run. A back up will be performed during this process. Must have the Backup setup completed in Payroll Professional with Automatic selected, Compressed can be ticked or un-ticked and the backup path completed. Will use the Secure backup if set up. This step will also determine whether it is the last period of the tax year or not based on the frequency and pay date selected in vPA for each client, and if it is the last period a manual step will be generated for Close year. This step is designed to be used for simple Director payrolls only with gross to net payment, where only tax, national insurance, student loans and postgraduate loans, attachment of earnings, non-banded pension schemes, banded pension schemes, auto enrolment have been calculated, and auto enrolment dashboard has been completed. Is suitable for Cumulative and Non-Cumulative Directors. This step checks for unsupported elements, see Appendix B.

What approval steps are available?

There are two approval steps called Internal and Client.

The Internal approval step is assigned to a specific staff member to approve or reject.

Whereas a Client approval step is assigned to Employer contact(s) and uploaded to myePayWindow for the Employer to approve or reject.

Terminology

- vPA virtual Payroll Assistant.
- Groups containers for multiple clients who have very similar day to day tasks and deadlines.
- **Process** a collection of payroll processing steps/tasks based on a pre-defined Process Template.
- Step an individual automated or manual processing step/task.
- Schedule this is the Process start/end date and frequency information.
- Reassign reassign a manual task from one Payroll Processor to another in the event of absence or work overload.
- **Rerun** already completed Steps within a client process can be re-run, e.g. re-calculate with new overtime hours.
- Widgets these refer to the charts displayed on the vPA Dashboard.
- **Pause** stop any further processing for a client process from the step that has not started. Can be unpaused when ready to continue processing.
- **Cancel** stop any further processing for a client process, any step that has started will be marked as Failed and steps thereafter will be cancelled and removed from processing. Will automatically generate the next process for the client based on the Group period details when the period number is next updated.
- Internal approval for a payroll processer to approve or reject via IPP or vPA.
- **Client approval** for Employer to approve or reject via myePayWindow.
- Planned processes these are based on the Group(s) set up where the processes have a status of Design and Ready where they have not been created yet. This information is generated every Sunday at midnight, it can be updated at any point via Planned Processes on the left menu and select Update. This information enables vPA to provide a projection of work for the next six months.
- **Created processes** these are processes that have been created for the Groups with a schedule set as Active. They are initially created when the schedule is changed to Ready, and thereafter when the automated step Create next process is completed.

vPA Roles

In vPA the Payroll team users can each be assigned to one of 3 roles. This assignment is managed in their myePayWindow user settings:

- **Payroll Department Admin** this is for the main vPA admin for the Bureau.
- vPA Supervisor this is a Payroll Manager or Team Leader role.
- vPA Operator this is a Payroll operative role.

Based on the role assigned a user has access to the following actions:

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Edit Group	Yes	No	No
View Group only	No	Yes	Yes
Add Group	Yes	No	No
Delete Group	Yes	No	No
Disable/Enable Group	Yes	No	No
Pause/Resume	Yes	Yes	Yes
Cancel	Yes	Yes	No
Rerun	Yes	Yes	No
Sign Off (manual tasks)	Yes	Yes	Yes (only if assigned to them)
Run Early	Yes	Yes	Yes
Check Status (Client Approval)	Yes	Yes	Yes
Respond (Internal Approval)	Yes	Yes	Yes (only if assigned to them)
Bureau Override (Client Approval)	Yes	Yes	No
Edit Step	Yes	Yes	No (unless a rejected internal approval)
Check Submission (FPS Send)	Yes	Yes	Yes
Reassign (Manual Tasks, single and multi-action)	Yes	Yes	No

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Team page	Yes	Yes	No
Add Team	Yes	No	No
Edit Team	Yes	No	No
Delete Team	Yes	No	No
View Team Only	No	Yes	No
Clients page	Yes	Yes	No
Groups page	Yes	Yes	a) Groups that have no Team assignmentb) Groups assigned to the team that the user belongs to
Process Progress page	Yes	Yes	a) Processes that have no Team assignmentb) Processes assigned to the team that the user belongs to
Step Progress page	Yes	Yes	a) Steps that have no Team assignmentb) Steps assigned to the team that the user belongs to
Planned Processes page	Yes	Yes	 a) Planned Processes that have no Team assignment b) Planned Processes assigned to the team that the user belongs to
Planned Steps page	Yes	Yes	 a) Planned Steps that have no Team assignment b) Planned Steps assigned to the team that the user belongs to

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Schedule checking for vPA Updates	Yes	No	No
Schedule installing vPA Updates	Yes	No	No
Schedule a vPA Engine Shutdown	Yes	No	No
Restart vPA services	Yes	Yes	Yes
Admin Settings	Yes	No	No
User Settings	Yes	Yes	Yes

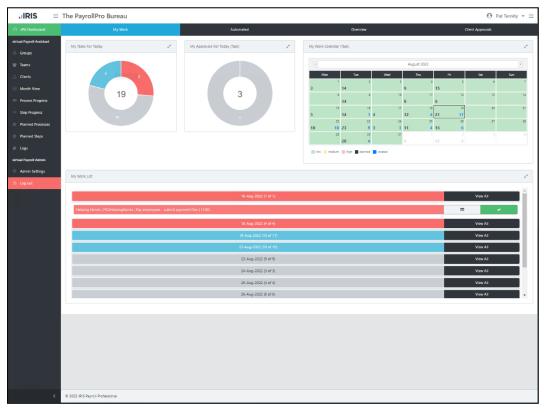
vPA website

Login to vPA website

Open Payroll Professional and select Home tab:



In the section virtual Payroll Assistant click on vPA to open the vPA website, then login using the same credentials you use for myePayWindow.



Dashboard page

After entering your credentials, you will arrive on the default vPA Dashboard page called My Work.

There are three other pages under the vPA Dashboard:

- Automated.
- Overview.
- Client Approvals.

My Work

, IRIS ≡	The PayrollPro Bureau									O Pat Te	ernity 👻 🗏
vPA Dashboard	My Work		Automated		Ove	erview			Client	oprovals	
virtual Payroll Assistant	My Tasks For Today	2	My Approvals For Today (Task) e^#	My Work Cal	endar (Task)						×.
🖉 Teams				< Mon	то	• \		t 2022	1	Sat	> Sun
Clients Month View	19		3	3	14	2	3 9	4 15	5	6	7
Process Progress				5	14 15 14	16 1 4	9 17 12	6 18 4 21	19	20	21
Planned Processes Planned Steps				10	22 10 23 23	23 9 3 30	24 3 11 31	25 4 15	25 6 2	27	28
Logs				low 📕 m	20 Nadium 🔳 high 🔳	4 planned Creati	6 14		4		
virtual Payroll Admin											
 Admin Settings Log out 	My Work List										2
			16-Aug-2022 (1 of 1)						١	/iew All	Пî.
	Helping Hands PSDHelpingHands Pay emplo	yees - submit pa	yment files 17:00						=	~	
			18-Aug-2022 (4 of 4)						1	/iew All	- 1
			19-Aug-2022 (10 of 17)						۱	/iew All	
			22-Aug-2022 (10 of 10)						١	view All	
			23-Aug-2022 (9 of 9)						1	riew All	-1
			24-Aug-2022 (3 of 3)							/iew All	_
			25-Aug-2022 (4 of 4)							/iew All	
			26-Aug-2022 (6 of 6)						1	view All	Ŧ

This tab contains four charts:

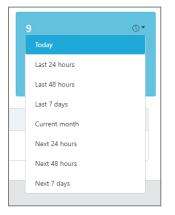
- Action Required (Rejected Internal Approvals) this only appears if the user has any rejected approvals that have been marked as Action Required By them.
- My Tasks For Today this is a donut chart which shows overall progress for all the manual tasks assigned to you today, it also includes manual tasks which are due tomorrow that you have completed today.
- My Approvals For Today this is a donut chart which shows overall progress for all the internal
 approvals assigned to you today, it also includes internal approvals which are due tomorrow that you
 have completed today.
- My Work Calendar shows uncompleted manual tasks for you. You will see there are two numbers, the one on the left are planned processes and those on the right are created processes. This chart is designed to allow you to see your manual task workload per day. You can drill through to see a breakdown of the work due by each day.
- My Work List shows as uncompleted manual tasks assigned to you, these are grouped by due date with the most immediately due tasks at the top of the list.

.IRIS ≡	The PayrollPro Bureau			🙁 Pat Ternity 👻 🚍
(?) vPA Dashboard	My Work	Automated	Overview	Client Approvals
virtual Payroll Assistant				
B Groups	1 0-	0 •	10 0-	7 0-
🗑 Teams	Failures Today	Warnings Today	Completed Today	Scheduled Today
요 Clents				
Month View				
Process Progress	Action Required (2 Steps)			1
:= Step Progress				
 Planned Processes 	Nuggets Nursery (NUGGETSNURSERY,MCP) - DPS Notifi Due: 29-Jul-2022 17:00 Date Failed: 18-Aug-2022 16:19	cations count check	Harry The Gardener (HARRYTHEGARDENER.MCP) - Create Rep Due: 30-Aug-2022 17:00 Date Failed: 19-Aug-2022 10:07	ort and Add To Outbox
O Planned Steps	Error: DPS: Unable To Check One Or More Notification Type	5	Error: The Client Has Not Been Registered On MyePayWindow	
a Logs				
virtual Payroll Admin				
Admin Settings				
Log out				

Automated

The top 4 charts, by default, show the progress of automated steps for 'today', they include any overdue steps.

To change the date-time-range for these charts click the clock icon in the right-hand corner and choose the required date-time range from the drop-down list:



All top four charts show the step level results, for automated steps.

The Action Required widget includes failed steps for all step types that need to be dealt with for the processes to continue, it excludes rejected internal and client approvals which have their own widgets.

Overview

			O Pat Terni	ty 📲
Θ	() (
Filter	5		 Apply 	🙁 Reset
Team:				
				~
User:				
				~
Exclu	de Users With No W	/ork: 🗹		
Group	By:			
•	asks 🔿 Client			

This tab contains four charts:

- Today's Work Breakdown this chart is an overview by payroll processor and the status of the manual tasks assigned to them and due today, this also includes overdue manual tasks shown in red. This chart is designed to allow you to see the manual task workload per individual payroll processor. You can use this chart to drill through and reallocate work as required to balance work more evenly across the team or to support planned or unplanned staff absence.
- Today's Work the donut chart provides a summary of the Today's Work Breakdown chart which is restricted to those tasks that were due today this also includes overdue manual tasks shown in red.
- Weekly Work Breakdown this chart shows the number of manual tasks for each payroll processor grouped by the task's due day. This summary has settings to see either manual tasks for Created Steps or Planned Steps, giving you the ability to see future workload (based on the week commencing selector). When Created Steps is selected the summary excludes manual tasks that have been completed. You can drill-through to see a step breakdown by clicking on the number value for a user/day. You can use this chart to drill through and reallocate work as required to balance work more evenly across the team or to support planned or unplanned staff absence.
- Work Calendar this chart is designed to allow you to see the uncompleted manual task workload for all payroll processors per day. You will see there are two numbers, the one on the left are planned processes and those on the right are created processes. You can use these charts to ensure you have

enough staff to cover the workload. You can drill through to see a breakdown of the work due by each day.

By default, these charts show the information by manual task, for all users who have at least one task assigned to them. You can use the filter under the burger bar on the right to:

					0	Pat Terni	ty 🔳
0	(i)	Φ					
Filter	rs					🗸 Apply	🙁 Reset
Team	:						
							~
User:							
							~
Exclu	ide Use	rs With M	lo Work	2			
Group	o By:						
• 1	asks (Client					

- Team use this option to show in the charts specific team(s) counts.
- User use this option to select specific users to show in the charts.
- Exclude Users with No Work by default this is ticked. Un-tick this box to show all users, with the box ticked it will show users who have at least one task allocated to them under planned and/or created.
- Group By Tasks or Client by default this is set as Tasks, select Client to see the number of clients allocated to each user.

Note – these settings are currently not saved, so if you select a different left-menu item other than the vPA Dashboard they will revert to the default settings.

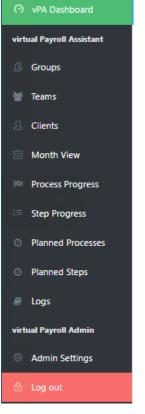
. IRIS ≡	The PayrollPro Bureau			Θ Pat Ternity $~=~$
O vPA Dashboard	My Work	Automated	Overview	Client Approvals
virtual Payroll Assistant	Approval Calendar (Tesk)	2	Action Required	× .
Clents Clents Month View Process Progress Step Progress Parned Processes Planned Steps Logs Logs Logs Logs Logs Logs Logs Log	Kupset Set2 Kun Fun Vite Fun 66 2 2 2 3 2 6 2 3 3 7 2 2 2 2 2 3 2 2 3 2 2 3	2 5 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	There are currently no reacted approvals.	
 Logs virtual Payroll Admin Admin Settings 	📗 low 🔜 medium 🌉 High 🌉 planned 📕 created			
ingani	Today's finalidam Sex: And Sean Casars (SPECARO/TRAICULATIFICIARD*) (Lent Rearway) (28.64-2022 (7.08) Today's Final-and (19.62-100/1000* ACP) (Cent Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear Reprint (28.64-2022 (7.08) Cherry Call; (PSC/MMY/Call; Clear	22 1790	Ver Al	
localhost:8082/spa/Dashboar	n ^a 2022 IRIS Payroll Professional d≢			

Client Approvals

This tab contains four charts:

- Approval Calendar shows uncompleted Client Approvals by due day. You will see there are two numbers, the one on the left are planned processes and those on the right are created processes. This chart is designed to allow you to see Client Approvals per day. You can drill through to see a breakdown of the Client Approvals due by each day.
- **Rejected Approvals** this shows details of Client Approvals that have been rejected, for you to deal with and re-run, as necessary.
- Today's Breakdown shows as uncompleted Client Approvals, these are grouped as follows:
 - Due prior to today.
 - Today which is split by the hour during working hours, prior to the start of the working day and after the end of the working day.
 - Due in the next 7 days.
- **Today's Approvals** the donut chart provides a summary of the status of Client approvals which is restricted to the client approvals that were due today this also includes overdue client approvals shown in red, rejected approvals in pale red, accepted approvals in green.

Left-Menu items



- Groups this is where you create and maintain vPA Groups of clients with similar processing
 requirements. From the Groups page you can assign clients to groups, define group processing
 parameters, assign various pre-defined process templates (plus steps), edit/add manual process steps,
 (start and due date), and make any initial assignment of manual tasks to payroll processors at Group,
 Client, or Process/step level.
- Teams this is where to create set up and maintain Teams, to allocate Users and Groups to a Team.
- Clients displays a list of clients that are assigned to a Group in vPA, these are payrolls that have been set up in your Payroll Professional environment.

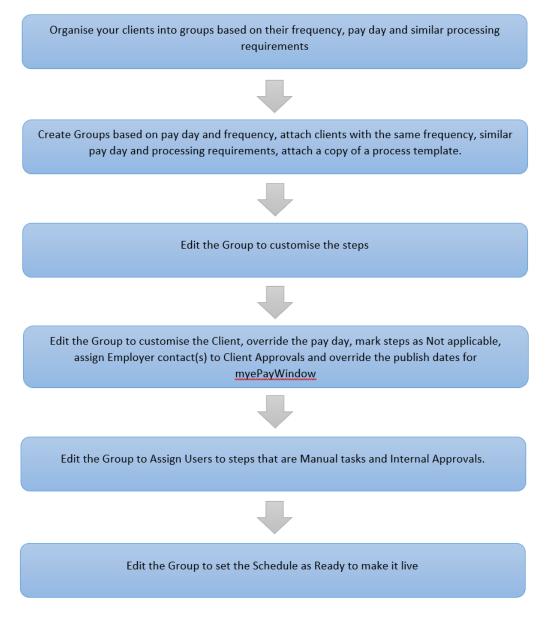
- Month View displays a calendar with the number of uncompleted tasks per calendar day, for all payroll processors.
- Process Progress allows you to see the progress of all clients' processes.
- Step Progress shows the progress of individual steps which includes automatic and manual tasks for all groups, processes, and clients.
- Planned Processes displays the future schedule for all clients in a group and process, where the process has a schedule set as Active, Ready or Design and includes the status of the schedule. This is a projection of work for the next six months.
- Planned Steps displays individual steps for the Planned Processes, the future schedule for all clients in a group and process, where the process has a schedule set as Active, Ready or Design. This is a projection of work for the next six months.
- Logs this is a vPA administration page that provides details of the vPA engine activity. The information shown is dependent on options selected on the 'Log settings' page. The most recent activity is shown first.
- Admin Settings this includes Bureau settings to customise the Calendar Colours shown based on the number of tasks. And Log settings to determine the audit details recorded by the vPA engine, we recommend all are enabled.

Auto Logout

When you have left the website idle for 10 minutes, you will automatically be logged out. You will see a message on the screen giving you chance to stay logged into the website.

Configuring vPA

To set-up vPA for live operation the following need to be completed:



How to set up a Group based on pay day

This example below is for a Weekly frequency.

Setting up a new group

vPA has a 4 -step 'new group' wizard to streamline new group creation:

- 1. Group name and Pay parameter settings.
- 2. Add/edit Client members.
- 3. Add/edit process templates.
- 4. Group set-up summary/confirmation.

vPA Dashboard	Groups (Advanced Filters Applied)								
tual Payroll Assistant	Sauch Seath Cear South Cear								
Groups									
Teams	Name	4 Frequency	Period Number	Tax Year	Pay Day/Date	Region :	Assigned Team	Status :	
Clients	Monthly - Changes - End of Month	Monthly	5	2022	31	England	Office 1	ENABLED	+
Month View	I Monthly - No Changes	Monthly	5	2022	28	Scotland	Office 1	ENABLED	+
Process Progress	121 Weekly - Directors	Weeky	21	2022	Monday	England	Directors	INABLED	+
Step Progress	📴 Weekly - Thursday	Weeky	20	2022	Thursday	England	Office 1	ENABLED	+
Planned Processes								Showing record 1 to 4 i	of 4 iter
Planned Steps							_		
Logs							Eq	port as CSV Export	rt as XLSX
al Payroll Admin									
Admin Settings									

To set up a new group, select **Groups** in the left-menu to display a list of groups that have previously been created:

Group set-up wizard – step 1

Click on

+ New Group to open the new group wizard:

New Group Wizard	- Details (1/4)	el
	and specify whether you want it to be based on Pay Day and/or Frequency. Note that i on Pay Day then it is required to also be based on Frequency.	if
Name:		
Based on Frequency:	•	
Frequency:	•	\$
Period Number:		
Tax Year:		
Based on Pay Day:	Θ	
Pay Date:	Select Pay Date	
Region:	\$	0
Do not adjust for bank holidays:	0	
Do not adjust for weekends:	0	
Team Assignment:	Select Team Clean	

Enter a name/description for the Group in Name field, e.g. Weekly – Pay Day Friday.

Now complete the following fields:

- Frequency select the frequency for all the Clients in this group, in this release Monthly, Weekly and Four Weekly frequencies are available so for this example choose weekly.
- **Period Number** enter the period number based on the frequency for the next period's payroll run. This number will be validated against the frequency.
- Tax Year enter the tax year based on the frequency and period number for the next period's payroll run, if it is tax year 2020/2021 enter 2020.
- Pay Day when the Frequency is selected as Weekly, select the day of the week that is the pay day using the drop-down, and when the Frequency is selected as Monthly enter the date of the month they are paid (if it is last day of the month you can select the 31st and the program will adjust for months where this date doesn't exist), when the Frequency is selected as Four Weekly click on the drop down to select the date that falls within the Period number and Tax Year selected.
- **Region** use the drop-down selector to choose England, Wales, Northern Ireland, or Scotland. Processing schedules will be adjusted automatically accordingly around the Bank Holidays as applicable per region.

- **Do not adjust for bank holidays** if you do not want the program to adjust the timetable for steps for this group for bank holidays, then tick the box.
- **Do not adjust for weekends** if you do not want the program to adjust the timetable for steps for this group for weekends, then tick the box.

Click **Next**, to move to the next step in the group set-up. The wizard will validate your entries and flag any problems before allowing you to proceed.

New Group Wizard	New Group Wizard - Details (1/4) Next → I Cancel									
	and specify whether you want it to be based on Pay Day and/or Frequency. Note that if on Pay Day then it is required to also be based on Frequency.									
Name:	Weekly									
Based on Frequency:	Θ									
Frequency:	Weekly \$									
Period Number:	5									
Tax Year:	2020									
Based on Pay Day:	Θ									
Pay Day:	Friday \$									
Region:	England 🗢 🖲									
Do not adjust for bank holidays:	0									
Do not adjust for weekends:	• •									
Team Assignment:	Select Team Clear									

You will see that there are information icons to provide helpful information.

Group set-up wizard – step 2

On successful validation, the Clients selection page is displayed:

New Group Wizard - Clients (2/4)		← Prev Next → 2 Cancel
From the list of Available clients, highlight those which you wish to include in the group and us same manner.	e the green arrow to move them to	the Selected clients list. You can use the red arrow to remove clients in the
Available clients: 25	Selected clients: 0	
Search Clear	Search	Clear
Bits And Bobs B8 PORtaundBobs Bids And Group B6 BridsandBobs Bids And Group B6 BridsandBobs Carpet Galore C6 FSDCarpetGalore Carpet Galore C5BCDengCide Country Homes CH CountyHomes.mcp Crundry Accounts CA FSDC-IndeCide Country Homes CH CountyHomes.mcp Dates Solicotor JD DuksSolicotors.mcp Bighting Rt Gym FC6 FSDEBightingHands Home Improvements H1 FSDHeightingHands Home Improvements M1 FSDHeightingHands Home Improvements M1 FSDHeightingHands Home Improvements M1 HomeImprovements.mcp Metagetic Carls MK6 FSDMites/Mctorbiks/hop Nuggets Nursey NN NuggetsNursey.mcp Shelfy's Cycle Shop SC5 ShellysCycleGhop.mcp	н	

The left-hand side shows the Available clients list, alpha sorted-(25 clients) for potential addition to this group. Note: Clients can exist in multiple groups simultaneously.

The right-hand side of this screen shows any clients that already belong to this group. You must add at least one client to a group.

To add clients to the Selected clients list from the Available client list, you can:

- Use the Search option to find a specific client, the clients are automatically filtered as text is entered: when the required client name is found, select it and then click on to add them to the selected clients list.
- Or scroll the available clients list to find a client and click on to add to the selected client list.
- You can select multiple clients by holding down the Ctrl button on your keyboard then click

To remove clients from the Selected clients list, use similar methods to the above highlighting the clients under the Selected clients list and click on

You can add and remove clients after the group has been created, see the section **Editing the group to complete the set up**.

You must have at least one Client under the Selected clients list, then click on **Next** to move to the next wizard step to add processing templates to the group:

Group set-up wizard – step 3

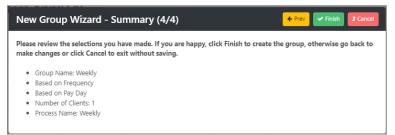
New Group Wizard - Process (3/4)									
Select a template to base	the process on and specify a name for it.								
Selected template:		\$	Preview						
Name:									

Using the drop-down box next to Selected template choose the process template that is relevant to this group, then complete the Name box with a description for the process (see appendix A for details of the process templates). Click on the Preview button to see the steps in the selected template:

Step Name	Job Type	Start		Due	
Check open run details	Initialise Process				
Client info received - Ready to process	Manual Task	08:00	1 Day Before Due	17:00	5 Days Before Pay Day
DPS Notifications Count Check	DPS Check	08:00	1 Day Before Due	17:00	5 Days Before Pay Day
Download DPS Notifications	Manual Task	08:00	1 Day Before Due	17:00	5 Days Before Pay Day
Download AE opt outs	Manual Task	08:00	1 Day Before Due	17:00	5 Days Before Pay Day
Enter data	Manual Task	08:00	2 Days Before Due	17:00	3 Days Before Pay Day
Calculate payroll	Manual Task	08:00	2 Days Before Due	17:00	3 Days Before Pay Day
internal approval	Internal Approval	08:00	2 Days Before Due	17:00	3 Days Before Pay Day
Upload review reports to myePayWindow	Manual Task	08:00	2 Days Before Due	17:00	3 Days Before Pay Day
Client approval	Client Approval	08:00	2 Days Before Due	17:00	3 Days Before Pay Day
Pay employees - submit payment files	Manual Task	08:00	1 Day Before Due	17:00	2 Days Before Pay Day
Upload final reports to myePayWindow	Manual Task	08:00	3 Days Before Due	17:00	On Pay Day
Create Full Payment Submission	Manual Task	08:00	3 Days Before Due	17:00	On Pay Day
Submit Full Payment Submission	Send FPS	08:00	3 Days Before Due	17:00	On Pay Day
Upload to myePayWindow	Empty Outbox	08:00	3 Days Before Due	17:00	On Pay Day
Empty myePayWindow Outbox	Manual Task	08:00	3 Days Before Due	17:00	On Pay Day
Auto Enrolment - Generate Notices and Feeds	Manual Task	08:00	5 Days Before Due	17:00	4 Days After Pay Day
Auto Enrolment - Upload Feed	Manual Task	08:00	5 Days Before Due	17:00	4 Days After Pay Day
Close Period	Manual Task	08:00	5 Days Before Due	17:00	5 Days After Pay Day
Open Period	Open Run	08:00	5 Days Before Due	17:00	5 Days After Pay Day

Click on Close to close the Preview screen, if the selected template is correct, click on Next to see a summary of the group you are setting up.

Group set-up wizard – step 4



Click **Finish** to save the new group. You can click on **Prev** to make changes to any of the previous screens or **Cancel** to discard the set up.

At this point all the clients selected will be checked to ensure they have been opened in the minimum version of IPP before the Group is created. If this check fails, the Group will not be created, a message is displayed showing the file names of the clients that need to be opened in IPP.

At this stage you have created the base setting and parameters for your client processing group, however before this can be activated you may need to customise the various options, for example pay day changes, and preferred payroll processor allocation by client and perhaps down to processing step (see below).

Customising the group 'base settings':

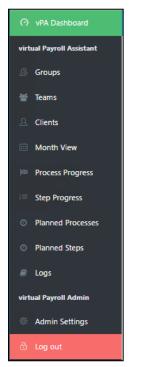
Once the group has been created you <u>may</u> need to edit the group to:

- Customise the steps (add or delete manual steps).
- Change the steps timetable.
- Customise the DPS check step to select the step to move to if there are no DPS notifications to download.
- Customise the Empty Outbox step to choose the outbox items to upload, enter the publish date(s) and which step to move to if the selected type(s) are uploaded to myePayWindow successfully.
- Assign users to manual steps.
- Assign users to internal approval steps.
- Override Client pay day if it differs from the Group default.
- Enter Clients approver if it differs from the default Employer contact setup in myePayWindow.
- Choose what happens if the due date and time are passed for a Client approval step.
- Enter specific description to appear on myePayWindow for the Client approval step.
- Mark specific steps for a Client as not applicable.
- Override Client Payslip and/or Documents publish date(s) if they differ from the Group default.

However, you <u>will</u> need to edit the group to:

• Define when the process for the group is Ready for live usage.

To do this, go to the Groups option in the left-menu:



Find the Group you have just added in the Groups listing and click the '+' icon:

Froups (Advanced Filters /		ew Group	Refres					
iearch Search Clear	Status: Enabled - So	rted: Name -	By:					
Name	1 Frequency	Period Number	Tax Year 🔅	Pay Day/Date	Region	Assigned Team	Status	
🖾 Monthly - Changes - End of Month	Monthly	7	2021	31	England	Office 1	ENABLED	+
🖾 Monthly - No Changes	Monthly	7	2021	28	Scotland	Office 1	ENABLED	4
🔯 Weekly - Changes	Weekly	27	2021	Wednesday	Northern Ireland	Office 1	ENABLED	•
📴 Weekly - Directors	Weekly	28	2021	Monday	England	Directors	ENABLED	+
📴 Weekly - Thursday	Weekly	26	2021	Thursday	England	Office 1	ENABLED	+

Next, click on the Edit action:

earch Search Clear	Status: Enabled - Son	ted: Name -	By:					
Name	1 Frequency	Period Number	Tax Year	Pay Day/Date	Region :	Assigned Team	Status 🔅	
Monthly - Changes - End of Month	Monthly	7	2021	31	England	Office 1	ENABLED	
🛿 Monthly - No Changes	Monthly	7	2021	28	Scotland	Office 1	ENABLED	
🛛 Weekly - Changes	Weekly	27	2021	Wednesday	Northern Ireland	Office 1	ENABLED	
🛛 Weekly - Directors	Weekly	28	2021	Monday	England	Directors	ENABLED	
🛛 Weekly - Thursday	Weekly	26	2021	Thursday	England	Office 1	ENABLED	

The Edit Group form is displayed (see below)

요 Edit Group - We	ekly - Thursday		Client Process Override Save Client
Group Details	Name:	Weekly - Thursday	
Process	Based on Frequency:	2 0	
Clients	Frequency:	Weekly	\$
	Period Number:	26	
	Tax Vear:	2021	
	Based on Pay Day:	0	
	Pay Day:	Thursday	\$
	Region:	England	0
	Do not adjust for bank holidays:	0	
	Do not adjust for weekends:	Θ	
	Team Assignment:	Office 1	Select Team Clear
	Manual Assignment:	Pat Ternity	Select User Clear 0
	Status:	Enabled	0

The **Group details** tab shows the information entered during the New Group Wizard, you can change the settings, if required.

By Default, the **Status** will be 'Enabled'. If you want to discontinue using this group, change the Status to 'Disabled', this will stop any further processing for steps that have not been completed and no further process steps will be created.

The Period Number is automatically updated when one of the client's process attached to the group moves on to the next period number, which is when the automatic step called **Create next process** is completed. The period number is also recorded against the client, for their first process created for this group the period number is based on the group details. Thereafter the period number recorded against the client is used to create their next process.

Customising steps in a Group Process

To customise the steps, select the Processes tab from the Edit Group screen:

요 Edit Group - Wee	kly - Thursday				Client Process Override Save Close
Group Details	+ Enal	bled \$	Process Steps Schedule		
Processes	Weekly - Paid Th	iursdays			
Clients	Weekly - Paid III	-	Name:	Weekly - Paid Thursdays	
			Status:	Enabled	٥
			Based on Pay Day:		
			Manual Assignment:		Select User Clear Ø

The first tab **Process** allows you to amend/edit the **Name** of the process, if required.

Use the Steps tab (just above the Name label), to see the steps shown in sequential completion order:

요 Edit Group - Wee	ekly - Thurs	sday								Client Process Override	Save 2 Close
Group Details	+	Enabled	0	Pro	ocess Steps Schedu	le .					
	Mookly -	Paid Thursdays	Ŷ								
Clients		100 11010035	Ŧ		Enabled	•	Details	Settings			
	-				Check open run	Î	Name:		Check open run details		
					Client info recei		Status:		Enabled		¢
					DPS Notificatio						
					Download DPS						
					Download AE O						
					Enter data						
					Calculate payroll						
					Internal approval						
					Upload review r	-					
					* * * 0						

Add, disable, delete and re-order the steps

Please be aware that steps originating from the provided process templates cannot be re-named or deleted, they can only be moved and disabled. This is because when steps are automated in later releases these default steps will be (optionally) automatically updated.

Use the buttons under the list of steps to add, delete and re-order the steps:

↑ ↓ + ≞

To move a Step, highlight the step and click the up and down arrows.

To delete a Step, highlight the step and use the delete button.

To disable a Step, highlight the step in the step list and use the Status drop-down selector and choose Disabled:

요 Edit Group - Wee	ekly - Thurs	day							Client Process Override Save Close
Group Details	+	Enabled	٥	Pn	ocess Steps Schedu	le le			
	Weekly -	Paid Thursdays	÷						
Clients		1010 110150035	Ŧ		Enabled	٥	Details Setting	gs	Timetable
					Check open run	Î	Name:		Internal approval
					Client info recei		Status:		Enabled ¢
					DPS Notificatio				Enabled
					Download DPS				Disabled
					Download AE O				
					Enter data				
					Calculate payroll				
					Internal approval				
					Upload review r	÷			
					* * * 🗉				

To add a manual step click on the plus sign, the Add a step form will open:

Add a step		Save Cancel
Details Settings		
Name:		

Enter a **Name** for the Step, as this is a manual step enter a brief description (maximum of 100 characters) of the activity or work a user needs to complete for all clients in this group.

Select the **Settings** tab:

Add a step		Save 🖀 Cance	-1
Details Settings			
Job Type:	Manual Task	\$	1
	Manual Task		í I
	Internal Approval		
	Client Approval		
	Backup Payroll		
	Open Run		
	Calculate		
	Close Run		
	Send FPS		
	Create FPS		
	DPS Check		
	Empty Outbox		
	Create Next Process		

The Job Type will default to Manual Task, however the following automated tasks are also available:

- Initialise Process check open run details must always be the first step.
- Internal Approval
- Client Approval
- Backup Payroll
- DPS Check
- **Calculate** limited to simple director payrolls, gross to net with tax and national insurance calculations only. This step checks for unsupported elements, see Appendix B, and excludes calculated employees.
- Create FPS limited to simple director payrolls with calculations for gross to net with tax, national insurance, student loan and postgraduate loan, attachment of earnings orders, non-banded pension schemes, banded pension schemes and auto enrolment only. If it is determined it is the last period of the tax year and the data file only has one frequency (checks employees and payroll runs for the current tax year), then the Final Submission flag is included in the FPS. This step checks for unsupported elements, see Appendix B.
- Send FPS please note that if the Employer is Opted in to EVC, when this step is performed via vPA the data is NOT send to EVC
- Create Report creates individual PDFs of the selected reports and adds them to myePayWindow outbox assigned to the Default contact set up in myePayWindow. See Appendix C for a list of available reports.
- Empty Outbox to upload selected outbox items, Employer already connected to myePayWindow and all employees must have previously been uploaded to myePayWindow.
- Close Run must be before Open Run, limited to simple director payrolls, gross to net with tax, national insurance, student and postgraduate loans, attachment of earnings, non-banded pension schemes, pension schemes, auto enrolment only, and auto enrolment dashboard completed. If this step determines it is the last period of the tax year based on the frequency and pay date set in vPA for each client, a manual step will be generated for Close year. This step checks for unsupported elements, see Appendix B.
- Open Run must be after Close Run. Where the clients process setting called Pay Day Setting is selected as Default or Specific Day, this step will set the pay date for the period in the payroll data file as the date set in vPA.

• Create Next Process – must always be the last step.

Click on Save.

Important notes:

Do not forget to move your new step using the up and down arrows, so that the steps are in the order that they are to be completed. Also Edit the step(s) to enter the **Timetable**.

The name of the step and the Job Type can be changed after the step has been saved.

The first step called **Check open run details** is an automated step which checks that the Client data files are in the tax year, frequency and period number set at group level. This step cannot be moved, deleted, or disabled.

Editing the step Timetable

The best practice process templates include default settings for the Due and Start day and times for each of the steps provided, see Appendix A for further details. You can, if required amend the Due and Start day and time settings for each step in a process to meet the requirements of the group and your business requirements.

For any new steps that you have created, you will need to complete the **Timetable**.

From the Edit Group screen select Processes, then highlight the Process and select the Steps tab:

요 Edit Group - Wee	ekly - Thur	sday						🖼 Client Process Override 🗸 Sav	e J Close	lew Group	C Ref
Group Details	+	Enabled	٥	Pro	xcess Steps Schedu	le				orted: Name *	By:
Process	Weekly	- Paid Thursdays	÷							Status	1
Clients					Enabled	•	Details Settings	Timetable	date of	ult, the due date and s steps will be adjusted	d to
					Check open run		Due		I holiday	d weekends and bank /s – this can be chang	ged
					Client info recei		Due When:	● Before Pay Day 🔵 On Pay Day 🔵 After Pay Day	using t	he options on the gro details tab.	up
					DPS Notificatio Download DPS		Number of Days:	2		ENABLED	
					Download AE O		Due Time:	17:00 ×		ENABLED	
					Enter data		Start			ENABLED	
					Calculate payroll		Days Before Due:	1			
					Internal approval		Run Time:	08:00 ×			
					Upload review r	-					
					↑ ↓ + □					wing record 1 to	5 of 5

The first step called **Check open run details** is an automated step, it does not have any timetable settings as it is run after the automated step called **Create next process** is run.

Highlight a Step, then on the right-hand side of the screen select the **Timetable** tab. You are then able to change the **Due** and **Start** details for that step. Repeat the process to amend the timetable settings for other steps.

The **Due** section settings are used to calculate the due date for this step based on the pay day set at group level, or client level if it has been overridden.

- **Due When** there are three options:
 - **Before Pay Day** this is to calculate a step that needs to be completed before the pay day, the steps will be calculated working back from the pay day.
 - On Pay Day choose this option if the step is to be completed on the pay day.
 - After Pay Day this is to calculate a step that needs to be completed after the pay day, the steps will be calculated going forward from the pay day.
- Number of Days If the step is adjusted for bank holidays and weekends, then the Number of Days you are entering are working days (Monday to Friday excluding bank holidays). If the step is only to be adjusted for weekends, then the Number of Days you are entering are weekdays (Monday to Friday including bank holidays). If the step is not to be adjusted for either weekends or bank holidays, then the Number of Days you are entering are entering are entering are entering are entering are entering are bank holidays.
- Due Time enter the time of the day that the step must be completed by.

The **Start** section settings are used to calculate when this step can be started based on the due date, this date is also adjusted for bank holidays and weekends based on the settings under the Group.

- Days Before Due If the step is adjusted for bank holidays and weekends, then the Days Before Due you are entering are working days (Monday to Friday excluding bank holidays). If the step is only to be adjusted for weekends, then the Days Before Due you are entering are weekdays (Monday to Friday including bank holidays). If the step is not to be adjusted for either weekends or bank holidays, then the Days Before Due you are entering are or bank holidays, then the Days Before Due you are entering are weekends or bank holidays.
- **Run Time** enter the time of the day that the step can be started.

On clicking **Save**, validation is performed, you will be warned if any information is missing, invalid or if the timetable for each step is not sequential based on the Due by date and time.

Edit the DPS Check step

You can select a different step, if required, when there is no DPS information to download, that the process moves onto which is the **No Action Required Step**.

From the Edit Group screen select Processes then Steps:

요 Edit Group - Wee	ekly - Thurs	day								Client Process Override	Save Close
Group Details	+	Enabled	\$	Pn	ocess Steps Schedu	íe					
Process	Weekly - I	Paid Thursdays	÷								
Clients		· · · · · · · · · · · · · · · · · · ·	Ŧ		Enabled	٥	Details	Settings			
					Check open run	Î	Name:		Check open run details		
					Client info recei		Status:		Enabled		٥
					DPS Notificatio Download DPS						
					Download DPS						
					Enter data						
					Calculate payroll						
					internal approval						
					Upload review r	*					
					T V T U						

Highlight the **DPS check** step, then select **Settings**:

요 Edit Group - Wee	kly - Thurs	day							Client Process Override	Save Close
Group Details	+	Enabled	¢	Pro	scess Steps Schedu	le				
Process	Weekly - i	Paid Thursdays	÷							
Clients			*		Enabled	۰	Details Settings Timetab	ole		
	-				Check open run	Î	Job Type:	DPS Check		
					Client info recei		No Action Required Step:	Download AE	Opt Outs	÷ 0
					DPS Notificatio					
					Download DPS	۰.				
					Download AE O					
					Enter data					
					Calculate payroll					
					Internal approval					
					Upload review r	-				
					* * * ±					

Using the drop down for **No Action Required Step**, select the step for the process to move onto when there are no DPS notifications to download:

Group Details	Weekly - Thursday + Enabled	Process Steps Sche	lule			we
Process	Weekly - Paid Thursdays	÷ Enabled	\$	Details Settings Timetab	ж	
	-	Check open run	Î	Job Type:	DPS Check	
		Client info recei		No Action Required Step:	Download AE Opt Outs	. 0
		DPS Notificatio			Download DPS Notifications	
		Download DPS			Download AE Opt Outs Enter data	
		Download AE O			Calculate payroll	
		Enter data			Internal approval Upload review reports to myePayWindow	
					Client approval	
		Calculate payroll			Pay employees - submit payment files	
		Internal approval			Upload final reports to portal Create Full Payment Submission	
		Upload review r	-		Submit Full Payment Submission	
		* + + ±			Upload payslips and P45s to myePayWindow Empty myePayWindow Outbox	
					Auto Enrolment - generate notices and feeds	
					Auto Enrolment - upload feed Close period	

Click on Save.

Edit the Empty Outbox step

Change the outbox items to upload to myePayWindow, choose from the following list and amend the Publish Date for each outbox item, if applicable:

- Department Changes
- Cost Centre Changes
- Branch Changes
- Anonymise Employee
- Employee Changes
- Payslips
- Documents
- CIS Statements
- P45s

You can select a different step for the **No Action Required Step**, if required, when the selected outbox items in the outbox to be uploaded to myePayWindow successfully, that the process moves onto which is the **No Action Required Step**.

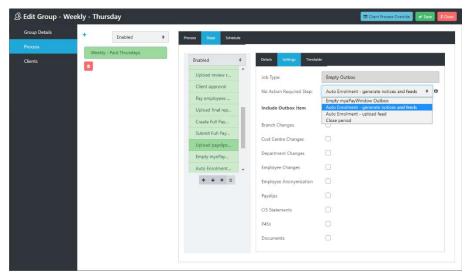
From the Edit Group screen select Processes then Steps:

요 Edit Group - W	eekly - Thu	rsday							Client Process Override	Save Close
Group Details	+	Enabled	\$ Proc	tess Steps Schedul	e					
	Weekly	- Paid Thursdays								
Clients		,.		Enabled	÷	Details	Settings			
				Check open run	Î	Name:		Check open run details		
				Client info recei		Status:		Enabled		\$
				DPS Notificatio						
				Download DPS						
				Download AE O						
				Enter data						
				Calculate payroll						
				Internal approval						
				Upload review r	-					

Highlight the Empty Outbox step, then select Settings:

Group Details	+	Enabled	\$	Process Schedule		
	Weel	kly - Paid Thursdays			-	
Jients			-	Enabled \$	Details Settings Timetat	
				Upload review r	Job Type:	Empty Outbox
				Client approval	No Action Required Step:	Auto Enrolment - generate notices and feeds 💠 0
				Pay employees	Include Outbox Item	Publish Date
				Upload final rep	include Outbox item	201000 (7)
				Create Full Pay Submit Full Pay	Branch Changes	
				Upload payslips	Cost Centre Changes	0
				Empty myePay	Department Changes	0
				Auto Enrolment 🗸	Employee Changes	
				* + + =	Employee Anonymisation	0
					Payslips	0
					CIS Statements	
					P45s	
					Documents	
					Documents	0

Using the drop down for **No Action Required Step**, select the step for the process to move onto when the selected item type(s) have been uploaded to myePayWindow successfully:



Now tick the box for each outbox item you want to upload to myePayWindow, at least one outbox item must be selected.

Then complete the **Publish date** information for each outbox item selected, if applicable. If the item type is to be published to the employees on pay day leave it as zero, otherwise enter the number of days before pay day.

dit Group - We	eekly - Thu	rsday					🖽 Client Process Override 🛛 🛹 Save
Froup Details	+	Enabled	•	Process Steps Schedule			
rocess	Weekly	r - Paid Thursdays					
lients				Enabled +	Details Settings Timetab	le	
				Upload review r	Job Type:	Empty Outbox	
				Client approval	No Action Required Step:	Auto Enrolment -	generate notices and feeds 🔹 🛛
				Pay employees	Include Outbox Item	Publish	Date Unselect All
				Upload final rep Create Full Pay			Unselect All
				Submit Full Pay	Branch Changes	☑ N/A	
				Upload payslips	Cost Centre Changes	N/A	
				Empty myePay	Department Changes	N/A	
				Auto Enrolment 👻	Employee Changes	☑ N/A	
				* * * =	Employee Anonymisation	N/A	
					Payslips	0	Day(s) Before Pay Day
					CIS Statements	0	Day(s) Before Pay Day
					P45s	0	Day(s) Before Pay Day
					Documents	0	Day(s) Before Pay Day

Click on Save.

Edit the Create Report step

From the Edit Group screen select **Processes**, under the **Steps** tab highlight the step **Create Report and Add to Outbox**, then select **Settings**:

요 Edit Group - Gen	erate Repor	t - Weekly						E Client Process Override	Save Close
Group Details	+	Enabled	¢ Pr	ocess Steps Schedu	e				
	Generate	Report - Weekly			_				
Clients		черон теску		All	\$	Details Settings Ti	imetable		
	-			Check open run	Î	Job Type:	Create Report		
				Calculate		Report Name:	PARUN6/PSRU	Nő	¢
				Upload review r		Export Type:	PDF		\$
				Create Full Pay Submit Full Pay		Export File Name Overr	ide:		0
				Create Report a		Add To Outbox:			
				Upload to mye					
				Empty myePay					
				Close period	-				
				↑ ↓ + □					

Changing the reports

To change the reports produced by the Create Report step, from the Edit Group screen select **Processes**, under the **Steps** tab highlight the step **Create Report and Add to Outbox**, then select **Settings**:

Group Details	+ Ena	bled	¢ .	Process	Steps	Schedule						
Process	Generate Report	- Monthly										
Clients		montany		Enable	d		\$	Details Settings Time	table			
				Check	k open r	un	Î	Job Type:	Create Repor	t		
				Creat	e Repor	t a		Number of reports selecte	:d: 4		A	.dd/Remove
				Uploa	ad to my	/e						
				Empt	y myePa	iy		Report Name	Export Type	File Name Override	Add To Outbox	
				Close	period					Overnue	Outbox	_
				Open	period			PAPEN1/PSPEN1	PDF			Edit
				Creat	e next p	ro	Ŧ	PARUN6/PSRUN6	PDF			Edit
				•	* 1	• •		PARUNT3/PSRUNT3	PDF			Edit
								PARUNT5/PSRUNT5	PDF			Edit

Click on the **Add/Remove** button:

Available Reports: 8			Selected Reports: 4	
Search	Clear		Search	Clear
PACSTPRD/PSCSTPRD PACSTT4/PSCSTT4 PAPEN1BD/PSPEN1BD PAPEN1C/PSPEN1C PARUNT/PSRUNT PARUNT7/PSRUNT7 PARUNT8/PSRUNT8 PARUNT9/PSRUNT9	*	H	PAPEN1/PSPEN1 PARUN6/PSRUN6 PARUNT3/PSRUNT3 PARUNT5/PSRUNT5	•
	Ŧ			Ŧ

To add reports to the **Selected Reports** list from the **Available Reports** list, you can:

- Highlight the available report and then click on to add it to the Selected Reports list
- You can select multiple reports by holding down the Ctrl button on your keyboard then click

To remove reports from the Selected Reports list, use similar methods to the above highlighting the reports under the Selected Reports list and click on

Click on **OK**, then select **Save** in the Edit Group screen.

Entering custom report name(s)

From the Edit Group screen select **Processes**, under the **Steps** tab highlight the step **Create Report and Add to Outbox**, then select **Settings**:

Eult Group - Gei	nerate Repo	ort - Monthly					📼 Client Pi	rocess Override	✓ Save
Group Details	+	Enabled	¢	Process Steps Schedule					
Process Clients	Generat	e Report - Monthly		Enabled \$	Details Settings Timeta	able			
				Check open run	Job Type:	Create Repor	t		
				Create Report a	Number of reports selected	± 4		Add	/Remove
				Upload to mye Empty myePay	Report Name	Export Type	File Name Override	Add To Outbox	
				Close period Open period	PAPEN1/PSPEN1	PDF			Edit
				Create next pro	PARUN6/PSRUN6	PDF			Edit
				* + ±	PARUNT3/PSRUNT3	PDF			Edit
					PARUNT5/PSRUNT5	PDF			Edit

The file name of the report generated by this step is made up of the following with underscore character between:

- Report Name file name of the report
- Client Reference shown in IPP under File\Open\By Name
- DataID unique ID for the client saved in the data file under Employer Details
- Frequency this will be the number, so for Monthly 12
- Period Number
- Tax Year this will be the year beginning, so for 2022/23 will show 2022
- Extension .pdf

Example file name PARUN6_ClientRef_100_12_1_2022.pdf

To enter a custom name for a report, click on the Edit button to the right of the report:

Edit Report Details					
Report Name:	PARUN6/PSRUN6				
Export Type:	PDF	\$			
Export File Name Override:		0			
Add To Outbox:					

Enter the description under Export File Name Override, this replaces the Report Name in the file name generated.

The following validation is performed for the Export File Name Override when you click on OK:

- Only alphanumeric and underscore characters are accepted
- Length of the file path, file name and extension does not exceed 260 characters
- Description entered under Export File Name Override is unique for each report included in the Create Report step

Click on **OK** to save the Export File Name Override.

Repeat the process for each report that you want to override the file name.

Assign specific users to Manual steps

It is possible to assign users to Manual steps at various levels.

Step assignment is prioritised in the following order:

- 1. Group
- 2. Group|Client
- 3. Group|Process
- 4. Group|Process|Step
- 5. Group|Client|Process
- 6. Group|Client|Process|Step

If you have assigned a user at Level 6 Group | Client | Process | Step, this will take priority over any user assigned at Level 1 to 5.

You do not have to assign users to steps that are manual tasks at all levels, for example:

- If one user deals with the manual tasks for all Client payrolls and processes in a Group, you can assign the user at Group level.
- If specific user's deal with each client, then you can assign the user at Group | Client level.

Pooled manual steps

You do not have to assign users to manual tasks, as it is possible to assign users to manual tasks separately, for example all manual tasks due today. Just remember that if you do not assign users to manual tasks, then they will not be shown against specific users to see their progress or for signing them off as completed under the My task list in vPA website or Payroll Professional.

Assigning user at Group level

From the Edit Group screen, click on Group Details:

A Edit Group - Weekly - Thursday					
Group Details	Name:	Weekly - Thursday			
Process	Based on Frequency:	0			
Clients	Frequency:	Weekly	٥		
	Period Number:	26			
	Tax Year:	2021			
	Based on Pay Day:	0 O			
	Pay Day:	Thursday	٥		
	Region:	England	٥ 0		
	Do not adjust for bank holidays:	Θ			
	Do not adjust for weekends:	0			
	Team Assignment:	Office 1	Select Team Clear		
	Manual Assignment:	Pat Ternity	Select User Clear 0		
	Status:	Enabled	٠		

Against Assigned User click on **Select user** to see the prompt to select the user:

Search			Clear
Pat Ternity			4
Holly Daypay			
Mat Ternity			
Olive Vertime			
		✓ Select	1

Highlight the user and click on **Select**.

If you need to remove the assigned user, then click on the **Clear** button.

If you need to assign the clients process to another user click on Select user.

Click on Save.

Assigning user at Group | Client level

From the Edit Group screen, click on Clients, highlight the Client and select the Settings tab:

요 Edit Group - Wee	ekly - Thursday			Gient Process Override
Group Details	Enabled \$	Details Settings		
Process	Helping Hands	Client Manual Assignment:		Select User Clear 0
Clients	Williams Farm Shop		Default	÷ 0
	Add/Remove	Pay Day: Ti	Thursday	\$
		Next Process info: Period Number: 27	Tax Vear:	2021

Against Client Manual Assignment click on Select user to see the prompt to select the user:



Highlight the user and click on Select.

If you need to remove the manual assignment, then click on the Clear button.

If you need to assign the clients process to another user click on Select user.

Click on Save.

Assigning user at Group | Process level

From the Edit Group screen, click on Processes, then highlight the Process:

요 Edit Group - Wee	ekly - Thurs	sday						Client Process Override	Save 2 Close
Group Details	+	Enabled	\$	Process	Steps	Schedule			
	Waakhy -	Paid Thursdays	÷						
Clients	weekiy -	Palu muisuays	*	Name:			Weekly - Paid Thursdays		
				Status:			Enabled		۰
				Based o	n Pay Day:				
				Manual	Assignme	nt:		Select U	Jser Clear 0

Click on **Select user** to see the prompt to select the user:

Select User	
Search	Clear
Pat Ternity Holly Daypay Mat Ternity Olive Vertime	
	✓ Select J Cancel

Highlight the user and click on **Select**.

If you need to remove the manual assignment, then click on the Clear button.

If you need to assign the clients process to another user click on Select user.

Click on Save.

Assigning user at Group | Process | Step level

From the Edit Group screen, click on Processes, highlight the Process, select the Steps tab:

요 Edit Group - Wee	kly - Thurs	day							Client Process Override	Save Cose
Group Details	+	Enabled	0	Pn	ocess Steps Schedu	ke i				
Process	Maakhy -	Paid Thursdays	÷							
Clients	•	raid morsoays	Ŧ		Enabled	٥	Details Settings	Timetable		
					Check open run	Î	Job Type:	Manual Task		
					Client info recei		Manual Assignment:		Select User C	lear 0
					DPS Notificatio					
					Download DPS					
					Download AE O					
					Enter data					
					Calculate payroll					
					Upload review r					
					Upload review r	-				

Highlight the step then select **Settings**.

Note that the Manual Assignment only appears for steps that are manual tasks.

Click on **Select user** to see the prompt to select the user:

Select User		
Search	Cl	ear
Pat Ternity Holly Daypay Mat Ternity Olive Vertime		*
	Select 3	Cancel

Highlight the user and click on Select.

If you need to remove the manual assignment, then click on the Clear button.

If you need to assign the clients process to another user click on Select user.

Click on Save.

Assigning user at Group | Client | Process level

From the Edit Group screen, click on Clients, highlight the Client, select Client Process Override:

ent:	Helping Hands	\$	Process:	Weekly - Paid Thursdays		Group:	Weekly - Thursday	
ew:	Overview / Process Pre	view \$						
Step Name		Job Type		User	Scheduled		Due	
Check open ru	n details	Initialise Process						
Client info rec	eived - Ready to process	Manual Task	ş	Pat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
DPS Notificati	ons count check	DPS Check			04-Oct-2021 08:	00	05-Oct-2021 17:00	
Download DP	5 Notifications	Manual Task	ş	Pat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
Download AE	Opt Outs	Manual Task	1	Pat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
Enter data		Manual Task	1	Pat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
Calculate payr	lla	Manual Task	1	Pat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
Internal appro	val	Internal Approval	1	Mat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
Upload review	reports to myePayWindo	w Manual Task	1	Pat Ternity	04-Oct-2021 08:	00	05-Oct-2021 17:00	
Client approva	d	Client Approval			04-Oct-2021 08:	00	05-Oct-2021 17:00	
Pay employee	s - submit payment files	Manual Task	ſ	Pat Ternity	05-Oct-2021 08:	00	05-Oct-2021 17:00	
Upload final re	ports to portal	Manual Task	ſ	Pat Ternity	05-Oct-2021 08:	00	07-Oct-2021 17:00	
Create Full Pay	ment Submission	Manual Task	ş	Pat Ternity	05-Oct-2021 08:	00	07-Oct-2021 17:00	
Submit Full Pa	yment Submission	Send FPS			05-Oct-2021 08:	00	07-Oct-2021 17:00	
Upload payslip myePayWindo		Empty Outbox			05-Oct-2021 08:	00	07-Oct-2021 17:00	
Empty myePay	Window Outbox	Manual Task	1	Pat Ternity	05-Oct-2021 08:	00	07-Oct-2021 17:00	
Auto Enrolme feeds	nt - generate notices and	Manual Task	1	Pat Ternity	05-Oct-2021 08:	00	08-Oct-2021 17:00	
Auto Enrolme	nt - upload feed	Manual Task	ſ	Pat Ternity	05-Oct-2021 08:	00	08-Oct-2021 17:00	
Close period		Close Run			05-Oct-2021 08:	00	08-Oct-2021 17:00	
Open period		Open Run			05-Oct-2021 08:	00	08-Oct-2021 17:00	

ient:	Helping Hands	\$	Process:	Weekly - Paid Thursdays	Group: Weekly - T	hursday
ew:	Manual Task Assignment	\$				
ient Process Ma	nual Assignment:					Select User Clear
Step Name		Job Type		Assigned User	Assignment Level 🕄	
Check open ru	n details	Initialise Process				
Client info rece	eived - Ready to process	Manual Task		Pat Ternity	1. Group	🕼 Override
DPS Notificatio	ons count check	DPS Check				
Download DPS	Notifications	Manual Task		Pat Ternity	1. Group	C Override
Download AE	Opt Outs	Manual Task		Pat Ternity	1. Group	C Override
Enter data		Manual Task		Pat Ternity	1. Group	🕼 Override
Calculate payre	llc	Manual Task		Pat Ternity	1. Group	🕼 Override
Internal appro	val	Internal Approval				
Upload review	reports to myePayWindow	Manual Task		Pat Ternity	1. Group	🕼 Override
Client approva	I	Client Approval				
Pay employees	- submit payment files	Manual Task		Pat Ternity	1. Group	C Override
Upload final re	ports to portal	Manual Task		Pat Ternity	1. Group	C Override
Create Full Pay	ment Submission	Manual Task		Pat Ternity	1. Group	🕼 Override
Submit Full Pa	ment Submission	Send FPS				
Upload payslip	is and P45s to myePayWindow	Empty Outbox				
Empty myePay	Window Outbox	Manual Task		Pat Ternity	1. Group	C Override
Auto Enrolmer	t - generate notices and feeds	Manual Task		Pat Ternity	1. Group	C Override
Auto Enrolmer	it - upload feed	Manual Task		Pat Ternity	1. Group	C Override
Close period		Close Run				
Open period		Open Run				

Under View select Manual Task Assignment then click on Edit:

Against Client Process Manual Assignment click on Select user to see the prompt to select the user:

elect User	
Search	Clear
Holly Daypay Mat Ternity Olive Vertime Pat Ternity	*
	÷
elect None	Select Cance

Highlight the user and click on **Select**.

If you need to remove the manual assignment, then click on the Clear button.

If you need to assign the client's process to another user click on **Select user**.

Click on Save.

Assigning user at Group | Client | Process | Step level

From the Edit Group screen, click on Clients, highlight the Client, select Client Process Override then the Process from the drop down:

ient:	Helping Hands	\$	Process:	Weekly - Paid Thursda	ys	Group:	Weekly - Thursday	
iew:	Overview / Process Pre	view \$						
Step Name		Job Type		User	Scheduled		Due	
Check open n	un details	Initialise Process						
Client info rec	eived - Ready to process	Manual Task		Pat Ternity	04-Oct-2021 08:00	D	05-Oct-2021 17:00	
DPS Notificati	ions count check	DPS Check			04-Oct-2021 08:00	0	05-Oct-2021 17:00	
Download DP	S Notifications	Manual Task		Pat Ternity	04-Oct-2021 08:0	0	05-Oct-2021 17:00	
Download AE	Opt Outs	Manual Task		Pat Ternity	04-Oct-2021 08:00	D	05-Oct-2021 17:00	
Enter data		Manual Task		Pat Ternity	04-Oct-2021 08:00	D	05-Oct-2021 17:00	
Calculate pays	roll	Manual Task		Pat Ternity	04-Oct-2021 08:00	D	05-Oct-2021 17:00	
Internal appro	oval	internal Approval		Mat Ternity	04-Oct-2021 08:00	D	05-Oct-2021 17:00	
Upload reviev	v reports to myePayWindo	w Manual Task		Pat Ternity	04-Oct-2021 08:00	D	05-Oct-2021 17:00	
Client approv	al	Client Approval			04-Oct-2021 08:00	0	05-Oct-2021 17:00	
Pay employee	es - submit payment files	Manual Task		Pat Ternity	05-Oct-2021 08:00	D	05-Oct-2021 17:00	
Upload final r	eports to portal	Manual Task		Pat Ternity	05-Oct-2021 08:00	0	07-Oct-2021 17:00	
Create Full Pa	yment Submission	Manual Task		Pat Ternity	05-Oct-2021 08:00	0	07-Oct-2021 17:00	
Submit Full Pa	ayment Submission	Send FPS			05-Oct-2021 08:00	0	07-Oct-2021 17:00	
Upload paysli myePayWindd	ps and P45s to ow	Empty Outbox			05-Oct-2021 08:00	D	07-Oct-2021 17:00	
Empty myePa	yWindow Outbox	Manual Task		Pat Ternity	05-Oct-2021 08:00	0	07-Oct-2021 17:00	
Auto Enrolme feeds	nt - generate notices and	Manual Task		Pat Ternity	05-Oct-2021 08:00	D	08-Oct-2021 17:00	
Auto Enrolme	nt - upload feed	Manual Task		Pat Ternity	05-Oct-2021 08:00	D	08-Oct-2021 17:00	
Close period		Close Run			05-Oct-2021 08:0	0	08-Oct-2021 17:00	
Open period		Open Run			05-Oct-2021 08:00	D	08-Oct-2021 17:00	

Under View select Manual Task Assignment then click on Edit:

ient:	Helping Hands	¢	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday	
ew:	Manual Task Assignment	\$					
ient Process Ma	nual Assignment:					Set	lect User Clear
Step Name		Job Type		Assigned User	Assignment I	Level 0	
Check open ru	n details	Initialise Process					
Client info rece	eived - Ready to process	Manual Task		Pat Ternity	1. Group		🕼 Override
DPS Notificatio	ons count check	DPS Check					
Download DPS	Notifications	Manual Task		Pat Ternity	1. Group		C Override
Download AE	Opt Outs	Manual Task		Pat Ternity	1. Group		🕼 Override
Enter data		Manual Task		Pat Ternity	1. Group		🕼 Override
Calculate payre	llc	Manual Task		Pat Ternity	1. Group		C Override
Internal appro	val	Internal Approval					
Upload review	reports to myePayWindow	Manual Task		Pat Ternity	1. Group		C Override
Client approva	I	Client Approval					
Pay employees	- submit payment files	Manual Task		Pat Ternity	1. Group		C Override
Upload final re	ports to portal	Manual Task		Pat Ternity	1. Group		C Override
Create Full Pay	ment Submission	Manual Task		Pat Ternity	1. Group		C Override
Submit Full Pag	ment Submission	Send FPS					
Upload payslip	is and P45s to myePayWindow	Empty Outbox					
Empty myePay	Window Outbox	Manual Task		Pat Ternity	1. Group		C Override
Auto Enrolmer	t - generate notices and feeds	Manual Task		Pat Ternity	1. Group		C Override
Auto Enrolmer	it - upload feed	Manual Task		Pat Ternity	1. Group		C Override
Close period		Close Run					
Open period		Open Run					

Against the step click on **Override** to see the prompt to select the user:

Select User	
Search	Clear
Holly Daypay Mat Ternity Olive Vertime Pat Ternity	
Select None	✓ Select 2 Cancel

Highlight the user and click on **Select**.

Repeat the process for each manual task that you want to assign a user.

If you need to remove the manual assignment, then click on the Clear button.

If you need to assign the manual task to another user click on Select user.

Click on Save.

Assignment overview

Whilst assigning users to manual tasks via Client Process Override, you have a view of the Manual Assignment. In the **Edit Group** screen click on **Clients**, highlight the Client then select **Client Process Override**:

요 Edit Group - Wee	kly - Thursday		Client Process Override Save 2 Cose
Group Details	Enabled \$	Details Settings	
Process	Helping Hands		
		Client Ref:	нн
	Williams Farm Shop	Client Name:	Helping Hands
	Add/Remove	Datafile Name:	PSDHelpingHands
		Status:	Enabled \$
		Connected to myePayWindow:	Ves

lient:	Helping Hands	\$	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday
iew:	Manual Task Assignment	¢				
lient Process	Manual Assignment:					
Step Name		Job Type		Assigned User		Assignment Level 9
Check oper	n run details	Initialise Proces	5			
Client info r	received - Ready to process	Manual Task		Pat Ternity		1. Group
DPS Notific	ations count check	DPS Check				
Download (DPS Notifications	Manual Task		Pat Ternity		1. Group
Download A	AE Opt Outs	Manual Task		Pat Ternity		1. Group
Enter data		Manual Task		Pat Ternity		1. Group
Calculate pa	ayroll	Manual Task		Pat Ternity		1. Group
Internal app	proval	Internal Approv	al			
Upload revi	ew reports to myePayWindow	Manual Task		Pat Ternity		1. Group
Client appro	oval	Client Approval				
Pay employ	ees - submit payment files	Manual Task		Pat Ternity		1. Group
Upload fina	l reports to portal	Manual Task		Pat Ternity		1. Group
Create Full	Payment Submission	Manual Task		Pat Ternity		1. Group
Submit Full	Payment Submission	Send FPS				
Upload pay	slips and P45s to myePayWindow	Empty Outbox				
Empty mye	PayWindow Outbox	Manual Task		Pat Ternity		1. Group
Auto Enrolr	nent - generate notices and feeds	Manual Task		Pat Ternity		1. Group
Auto Enrolr	nent - upload feed	Manual Task		Pat Ternity		1. Group
Close perio	d	Close Run				
Open perio	d	Open Run				

Under View select Manual Task Assignment to see the following:

You can view another clients step assignment for the current group by selecting the client from the drop down available at the top of the screen:

c	lient Proc	ess Override					Eff Edit 2 Close	
Vi	ient: ew: ient Process Ma	Helping Hands Helping Hands Williams Farm Shop anual Assignment:	\$	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday	
	Step Name		Job Type		Assigned User		Assignment Level	
	Check open ru Client info rec	in details eived - Ready to process	Initialise Process Manual Task	5	Pat Ternity		1. Group	

Assign user to Internal approval steps

You can assign users to Internal approval steps at two levels, which are prioritised in the following order:

- 1. Group|Process|Step level
- 2. Group|Client|Process|Step level

Assign user at Group | Process | Step level

From the Edit Group screen select Processes then Steps:

요 Edit Group - Wee	kly - Thurs	day								Client Process Override	Save Close
Group Details	+	Enabled	٥	Pr	rocess Steps Schedu	le					
Process	Weekly -	Paid Thursdays	÷								
Clients			Ť		Enabled	۰	Details	Settings			
	-				Check open run	Î	Name:		Check open run details		
					Client info recei		Status:		Enabled		¢
					DPS Notificatio						
					Download DPS						
					Download AE O						
					Enter data						
					Calculate payroll						
					Internal approval						
					Upload review r	-					
					↑ ↓ + □						

Highlight the Internal approval step then Settings:

요 Edit Group - Wee	kly - Thurs	day								Client Proces	s Override 💌	' Save	t Close
Group Details	+	Enabled	٥	Pr	rocess Steps Sched	ule							
Process	Weekly -	Paid Thursdays	÷										
Clients	e Vieekiy	Paid Hidisdays	÷		Enabled	٥	Details Settings	Timetable	2				
	-				Check open run	Î	Job Type:		Internal Approva	al			
					Client info recei	I.	Assigned Approver:		Mat Ternity		Select User	Clear	
					DPS Notificatio								
					Download DPS								
					Download AE O								
					Enter data								
					Calculate payroll								
					Internal approval								
					Upload review r	-							
					* * * ±								

Next the Assigned Approver click on Select User:

elect User	
Search	Clear
Pat Ternity	*
Holly Daypay	
Mat Ternity	
Olive Vertime	
	Select 1 Cance

Highlight the **user** then click on **Select**.

Click on Save.

Assign user at Group | Client | Process | Step level

From the Edit Group screen select Clients, highlight the client:

ß Edit Group - Weekly - Thursday Store Store								
Group Details	Enabled \$	Details Settings						
Process	Helping Hands	Client Ref:						
	Williams Farm Shop		н					
	Add/Remove	Client Name:	Helping Hands					
	MUUNEIIUVE	Datafile Name:	PSDHelpingHands					
		Status:	Enabled \$					
		Connected to myePayWindow:	Yes					

Click on Client Process Override, under View using the drop down select Approvals Override then click on Edit:

ent:	Helping Hands	\$ Process	Weekly - Paid Thursday	rs Group:	Weekly - Thursday	
w:	Approval Overrides	¢				
Step Name	Job Type	Override	Approver(s)	Action When Overdue	Override Description	
		Overnde	Approver(s)	Action when overdue	Overnde Description O	
Check open ru						
process	ived - Ready to					
DPS Notificatio	ons count check					
Download DPS	Notifications					
Download AE (Opt Outs					
Enter data						
Calculate payro	bil					
nternal approv	val Internal Approval		Mat Ternity			C Override
Upload review myePayWindo						
Client approva	Client Approval	YES	1 Selected	Complete Step		C Override
Pay employees payment files	- submit					
Upload final re	ports to portal					
Create Full Pay Submission	ment					
Submit Full Pay Submission	rment					
Upload payslip myePayWindo						
Empty myePay	Window Outbox					
Auto Enrolmen notices and fee						
Auto Enrolmen	t - upload feed					
Close period						
Open period						

Against the Internal Approval step click on Override:

Override Approval Step		V Ok J Cancel
Step Name:	Internal approval	
Approval step type:	Internal	\$
Assigned Approver:	Pat Ternity	Select User Clear

Next to Assigned Approver click on Select User:

Sele	ct User			
Se	earch			Clear
H N	at Ternity Iolly Daypay Iat Ternity Iive Vertime			*
			✓ Select	▼ Ĵ Cancel

Highlight the **user** then click on **Select**.

Click on Save.

Assign user to Close Year step created by Close Run step

The automated step called Close Run, creates a manual step for Close Year when it has determined it is the last period of the tax year.

A user will be assigned to the Close Year step, in the following order:

- 1. Group
- 2. Group|Client
- 3. Group|Process
- 4. Group|Client|Process

If you have assigned a user at Level 4 Group | Client | Process, this will take priority over any user assigned at Level 1 to 3.

Override Client's pay day

If one or more client's pay day differs from the day set at Group level, you can override it for those clients.

From Edit Group screen select Clients:

ß Edit Group - Weekly - Thursday								
Group Details	Enabled \$	Details Settings						
Processes	Helping Hands	Client Ref:	н					
Clients	Williams Farm Shop	Client Name:	Helping Hands					
	Add/Remove	Datafile Name:	PSDHelpingHands					
		Status:	Enabled \$					
		Connected to myePayWindow:	Yes					

Highlight the Client and then select **Settings** tab:

요 Edit Group - Wee	ß Edit Group - Weekly - Thursday ■Client Process Override 🗸 Save 🕽 Clase									
Group Details	Enabled \$	Details Settings								
Process	Helping Hands	Client Manual Assignment:			Select User Clear	0				
Clients	Williams Farm Shop	Pay Day Setting:	Default			0				
	Add/Remove	Pay Day:	Thursday			•				
		Period Number: 27		Tax Year: 2021						

These settings will default to those selected at Group level. Using the drop down for **Pay Day Setting**, you will see three options:

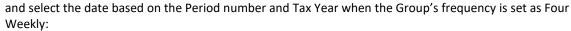
요 Edit Group - Weel	& Edit Group - Weekly - Thursday									
Group Details	Enabled \$	Details Settings								
Process	Helping Hands	Client Manual Assignment:			Select User Clear 0					
Clients	Williams Farm Shop	Pay Day Setting:	Default		: 0					
	Add/Bernove	Pay Day:	Default Use Run Date From Payroll Specific Day		o					
		Next Process info:								
		Period Number: 27		Tax Year:	2021					

- **Default** this is the setting at group level.
- Use Run Date From Payroll this option will get the date from the client's data file when the client's process is created for the next payroll run. The same checks are performed to ensure the client's data file is in the tax year, period number and frequency set at group level, if it is their first process otherwise under the client for future processes. If they are correct, then the pay day will be retrieved and used to calculate the due and start day for each step. Using this option does mean however that viewing schedules in advance via Planned Processes will use the Pay Day set under the Group with an annotation, as the date is not known until the client's process is created for the next payroll run.
- **Specific Day** when you select this option the Pay Day field is available to select the day of the week when the Group's frequency is set as Weekly:

🖞 Edit Group - Weekly - Thursday								
Group Details	Enabled \$	Details Settings						
Process	Helping Hands	Client Manual Assignment:	Select User Clear	0				
Clients	Williams Farm Shop	Pay Day Setting:	Specific Day 0	0				
	Add/Remove	Pay Day:	•					
		Next Process info: Period Number: 27	Monday Tuesday Wednesday Thursday Friday Saturday Sunday					

and the date of the month when the Group's frequency is set as Monthly:

A Edit Group - Mor	nthly - No Changes				Client Process Override	✓ Save	‡ Cose
Group Details	Enabled \$	Details Settings					
Process	Brides And Grooms	Client Manual Assignment:			Select Us	er Clear	0
Clients	Country Homes	Pay Day Setting:	Specific Day			۰	0
	Menagerie Castle Shelly's Cycle Shop	Pay Day:	25				
	Smiths Decorators	Next Process info:					
	Tommy's Timber Yard	Period Number: 8		Tax Year:	2021		
	Add/Remove						



Edit Group - 4Week	ly								Client Proce	ss Override 🗹 🗸 Si	nve 10
Group Details	Enabled	¢	Details Settings								
Processes	4 Weekly Specific		Client Manual Assignment:				_			Select User	Clear 6
Clients Four Weekly Default Four Weekly Run Date Add/Remove			Pay Day Setting:	Specific Day							÷ 6
			Pay Date:	Select Pay Date Apr 9, 2021							
			Next Process info:	~	Apr	il 202		\rightarrow			
			Period Number: 1	Sun Mo	n Tue	Wed T	hu Fri	Sat	2021		
							1 2				
Edit Delet	e Disable			4 5	6	7	в 🦻	10			
Awkly Period 1	3	Four Weekly	1	11 12		14 1		17	England		•
2 4Wkly Period 1	4	Four Weekly	1	18 19 25 26			2 23	24	England		

Click on Save.

Customize the Client Approval step

There are two levels where you can tailor the Client approval step, which are prioritised in the following order:

- 1. Group|Process|Step level
- 2. Group | Client | Process | Step level

Group | Process | Step level

At this level you can change the following for a all clients:

- Choose the Action when overdue.
- Enter a description to appear on myePayWindow to the Employer contact(s).

From the Edit Group screen select Processes then Steps:

요 Edit Group - Wee	ekly - Thurs	day								Client Process Override	Save 2 Close
Group Details	+	Enabled	¢	Pn	rocess Steps Schedu	ile					
Process	Weekly -	Paid Thursdays	÷								
Clients			Ŧ		Enabled	٠	Details	Settings			
					Check open run	Î	Name:		Check open run details		
					Client info recei		Status:		Enabled		٥
					DPS Notificatio Download DPS						
					Download AE O						
					Enter data						
					Calculate payroll						
					Internal approval						
					Upload review r	-					

Now highlight the **Client approval** step and select **Settings**:

Group Details Enabled Process Process Weekly - Paid Thundays Filter Clients Enabled Process Details Softward	요 Edit Group - We	y - Thursday	Gient Process Override Save	20
Clients Clients Clients Clients Clients Clients Clients Clients Client C	Group Details	+ Enabled © Process Steps Schedule		
Clients ENDER DPS Notification Notice Client Approval Intervent Client Approval Intervent I		Weekly - Paid Thursdays		
Download PPS Download AE O Einter data Calculate payroll Upload review r Cellent approval Pay employees *	Clients	Pratilication Download DPS Download AE O Enter data Calculate payroll Internal approval Upload review r Client approval Pay employees	Client Approval Dverdue: Do Nothing	

Complete the following:

• Action When Overdue – this is to decide what happens with this step when the due date and time has passed, and no response has been received from the Client. There are three options to choose from:

요 Edit Group - Wee	kly - Thurs	day							ent Process Override	✓ Save	‡ Close
Group Details	+	Enabled	\$	Pn	xcess Steps Scheo	ule					
	Maakhy -	Daid Thursdaus	-								
Clients	Weekly -	Paid Thursdays			Enabled DPS Notificatio Download DPS Download AE O Enter data Calculate payroll Internal approval Upload review r Client approval Pay employees	•	Detail: Settings Job Type: Action When Overc Override Description	Client Approval Do Nothing Do Nothing Complet Step Fail Step		\$	
					* * * 0						

- Do Nothing selecting this option will mean that the step will appear as Overdue under Client Approvals within the vPA Dashboard, no further steps can be processed until it has been dealt with.
- **Complete Step** this means the step will automatically be completed so the next step is available to be performed.
- Fail Step the step will appear as a Failed step under Client Approvals within the vPA Dashboard, this step or earlier steps will then need to be re-run.
- Override Description enter a description for all Client(s) to be uploaded for the Client Approval step to the Employer contact(s) on myePayWindow. If an Override Description has not been entered at Group | Client | Process | Step level then this Override Description will be used, if it is left blank then Step name will be used instead.

Click on Save.

Group | Client | Process | Step level

At this level you can change the following for a specific client(s):

- Change the Client Approval to an Internal Approval.
- Choose the Action when overdue.
- Enter a description to appear on myePayWindow to the Employer contact(s).
- Select the Employer contact(s) for the Client Approval to be sent to on myePayWindow.

From the Edit Group screen select Clients, highlight the client:

요 Edit Group - Wee	ıkly - Thursday		Gient Process Override 🛛 🗸 Save 🚺 Clase
Group Details	Enabled \$	Details Settings	
Process	Helping Hands		
		Client Ref:	нн
	Williams Farm Shop	Client Name:	Helping Hands
	Add/Remove	Datafile Name:	PSDHelpingHands
		Status:	Enabled \$
		Connected to myePayWindow:	Ves

lient Proces	s Override					✓ Save
ent:	Helping Hands	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday	
ew:	Approval Overrides	¢				
Step Name	Job Type	Override	Approver(s)	Action When Overdue	Override Description	
Check open run (details					
Client info receiv process	ed - Ready to					
DPS Notifications	s count check					
Download DPS N	lotifications					
Download AE Op	ot Outs					
Enter data						
Calculate payroll						
Internal approval	Internal Approval		Mat Ternity			C Ove
Upload review re myePayWindow	ports to					
Client approval	Client Approval	YES	1 Selected	Complete Step		C Ove
Pay employees - payment files	submit					
Upload final repo	orts to portal					
Create Full Paym Submission	ent					
Submit Full Paym Submission	nent					
Upload payslips a myePayWindow	and P45s to					
Empty myePayW	indow Outbox					
Auto Enrolment - notices and feed						
Auto Enrolment ·	- upload feed					
Close period						
Open period						
Create next proc	P55					

Click on Client Process Override, under View using the drop down select Approvals Override then click on Edit:

Against the **Client Approval** step click on **Override**:

Override Approval Step		Remove Override 🗸 Ok 🕇 Cance	d
Step Name:	Client approval		
Approval step type:	Client	:	+
Action When Overdue:	Complete Step	:	÷
Override Description:			0
Assigned Approvers:	1 Selected	View/Select Er Users	

Complete the following:

- Approval step type this will be Client for a Client approval step, however if required it can be overridden for a specific client to an Internal Approval step by selecting Internal. Remember if you select Internal you will need to Assign to a user.
- Action When Overdue this is to decide what happens with this step when the due date and time has passed, and no response has been received from the Client. There are three options to choose from:

Override Approval Step		Remove Override 🗸 Ok 🕽 Cancel
Step Name:	Client approval	
Approval step type:	Client	\$
Action When Overdue:	Complete Step	¢
Override Description:	Do Nothing Complete Step	
Assigned Approvers:	Fail Step 1 Selected	View/Select Er Users

- Do Nothing selecting this option will mean that the step will appear as Overdue under Client Approvals within the vPA Dashboard, no further steps can be processed until it has been dealt with.
- **Complete Step** this means the step will automatically be completed so the next step is available to be performed.
- **Fail Step** the step will appear as a Failed step under Client Approvals within the vPA Dashboard, this step or earlier steps will then need to be re-run.
- **Override Description** enter a description for this Client to be uploaded for the Client Approval step to the Employer contact(s) on myePayWindow. If this is left blank the one entered at Process level will be used, and if Process level is left blank the step description will be used.
- Assigned Approvers click on View/Select Er Users to see a list of Employer contacts set up on myePayWindow for this client, the following screen will appear:

Assigned Approvers				
Available Employer Users: 1			Selected Employer Users: 0	
Search	Clear		Search	Clear
Helping Hands	•	X		*
			🗸 Sa	ve X Discard

On the left side of the screen you will see the Available Employer Users, on the right the Selected Employer Users, you must select at least one Employer User. Highlight the Employer user on the left side of the screen then click . To remove the Employer user from the Selected Employer Users list, highlight the Employer user and click on .

Click on Save.

Mark specific steps for a Client that are not applicable.

If there are specific steps that are not applicable to one or more client's attached to the group, then you can mark these steps as Not applicable at Client level.

From Edit Grou	n screen select Clients	and highlight the client	t, click on Client Process Override:
FIOIII Eult GIOU	b screen select chemes	and mightight the client	, CIICK OIT CHEIT Process Override.

ient:	Helping Hands	\$	Process:	Weekly - Paid Thursdays		Group:	Weekly - Thursday	
iew:	Overview / Process Prev	view ¢						
Step Name		Job Type		Jser	Scheduled		Due	
Check open ru	un details	Initialise Process						
Client info rec	eived - Ready to process	Manual Task	Pa	it Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
DPS Notificati	ons count check	DPS Check			04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Download DP	S Notifications	Manual Task	Pa	it Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Download AE	Opt Outs	Manual Task	Pa	it Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Enter data		Manual Task	Pa	it Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Calculate payr	llo	Manual Task	Pa	it Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Internal appro	wal	Internal Approval	M	at Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Upload review	reports to myePayWindow	w Manual Task	Pa	it Ternity	04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Client approva	al	Client Approval			04-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Pay employee	s - submit payment files	Manual Task	Pa	it Ternity	05-Oct-2021 08	3:00	05-Oct-2021 17:0	0
Upload final n	eports to portal	Manual Task	Pa	it Ternity	05-Oct-2021 08	3:00	07-Oct-2021 17:0	0
Create Full Pag	ment Submission	Manual Task	Pa	it Ternity	05-Oct-2021 08	3:00	07-Oct-2021 17:0	0
Submit Full Pa	yment Submission	Send FPS			05-Oct-2021 08	3:00	07-Oct-2021 17:0	0
Upload paysli myePayWindo	ps and P45s to w	Empty Outbox			05-Oct-2021 08	3:00	07-Oct-2021 17:0	0
Empty myePa	/Window Outbox	Manual Task	Pa	it Ternity	05-Oct-2021 08	3:00	07-Oct-2021 17:0	0
Auto Enrolme feeds	nt - generate notices and	Manual Task	Pa	it Ternity	05-Oct-2021 08	3:00	08-Oct-2021 17:0	0
Auto Enrolme	nt - upload feed	Manual Task	Pa	it Ternity	05-Oct-2021 08	3:00	08-Oct-2021 17:0	0
Close period		Close Run			05-Oct-2021 08	3:00	08-Oct-2021 17:0	0
Open period		Open Run			05-Oct-2021 08	3:00	08-Oct-2021 17:0	0

Using the drop down for View select N/A Settings then Edit	Using the drop	down for View	select N/A S	ettings then Edit:
--	----------------	---------------	--------------	--------------------

Client:	Helping Hands	\$	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday
/iew:	N/A Settings	¢				
Step Name			Job Type		N/A 🚯	
Check oper	n run details		Initialise Process			
Client info	received - Ready to process		Manual Task			
DPS Notific	ations count check		DPS Check			
Download I	DPS Notifications		Manual Task			
Download	AE Opt Outs		Manual Task			
Enter data			Manual Task			
Calculate p	ayroll		Manual Task			
Internal app	internal approval		Internal Approval			
Upload revi	iew reports to myePayWindow		Manual Task			
Client appr	oval		Client Approval			
Pay employ	vees - submit payment files		Manual Task			
Upload fina	al reports to portal		Manual Task			
Create Full	Payment Submission		Manual Task			
Submit Full	Payment Submission		Send FPS			
Upload pay	rslips and P45s to myePayWindow		Empty Outbox			
Empty mye	PayWindow Outbox		Manual Task			
Auto Enrolr	ment - generate notices and feeds		Manual Task			
Auto Enrolr	ment - upload feed		Manual Task			
Close perio	d		Close Run			
Open perio	d		Open Run			

Tick the box next to each step that is not applicable for this client:

lient:	Helping Hands	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday
/iew:	N/A Settings	\$			
Step Name		Job Type		N/A 🖯	
Check open	run details	Initialise Process	;		
Client info r	received - Ready to process	Manual Task			
DPS Notific	ations count check	DPS Check			
Download [DPS Notifications	Manual Task			
Download A	AE Opt Outs	Manual Task			
Enter data		Manual Task			
Calculate pa	ayroll	Manual Task			
Internal app	proval	Internal Approva	al		
Upload revi	ew reports to myePayWindow	Manual Task			
Client appro	oval	Client Approval			
Pay employ	ees - submit payment files	Manual Task			
Upload fina	l reports to portal	Manual Task			
Create Full	Payment Submission	Manual Task			
Submit Full	Payment Submission	Send FPS			
Upload pay	slips and P45s to myePayWindow	Empty Outbox			
Empty myel	PayWindow Outbox	Manual Task			
Auto Enroln	nent - generate notices and feeds	Manual Task			
Auto Enroln	nent - upload feed	Manual Task			
Close perio	d	Close Run			
Open perio	d	Open Run			

Click on Save.

Override the Client's publish date for Payslips and/or Documents

If one or more client's publish date differs from the day set at Process Step level, you can override it for those clients.

Fram Edit Crow	n caraan calaat Clianta	and highlight the client	, click on Client Process Overrid	.
	o screen select Chenis		CIICK ON CHEMPPROCESS OVERHO	e

ient:	1 Frequency 4 Wkly Per	riod 14 Default 🔶	Process:	Weekly - Paid Thursdays		Group:	Weekly - Thursday	
ew:	Overview / Process Pre	view \$						
Step Name		Job Type		User	Scheduled		Due	
Check open n	un details	Initialise Process						
Client info rec	ceived - Ready to process	Manual Task		Kate Bush	14-Apr-2022	08:00	19-Apr-2022 17:00	
DPS Notificati	ions count check	DPS Check			14-Apr-2022	08:00	19-Apr-2022 17:00	
Download DP	S Notifications	Manual Task		Kate Bush	14-Apr-2022	08:00	19-Apr-2022 17:00	
Download AE	Opt Outs	Manual Task		Kate Bush	14-Apr-2022	08:00	19-Apr-2022 17:00	
Enter data		Manual Task		Kate Bush	14-Apr-2022	08:00	19-Apr-2022 17:00	
Calculate pay	roll	Manual Task		Kate Bush	14-Apr-2022	08:00	19-Apr-2022 17:00	
Internal appro	oval	Internal Approval			14-Apr-2022	08:00	19-Apr-2022 17:00	
Upload review	v reports to myePayWindo	w Manual Task		Kate Bush	14-Apr-2022	08:00	19-Apr-2022 17:00	
Client approv	al	Client Approval			14-Apr-2022	08:00	19-Apr-2022 17:00	
Pay employee	es - submit payment files	Manual Task		Kate Bush	19-Apr-2022	08:00	19-Apr-2022 17:00	
Upload final r	eports to portal	Manual Task		Kate Bush	19-Apr-2022	08:00	21-Apr-2022 17:00	
Create Full Pa	yment Submission	Manual Task		Kate Bush	19-Apr-2022	08:00	21-Apr-2022 17:00	
Submit Full Pa	ayment Submission	Send FPS			19-Apr-2022	08:00	21-Apr-2022 17:00	
Upload paysli myePayWindo	ips and P45s to ow	Empty Outbox			19-Apr-2022	08:00	21-Apr-2022 17:00	
Empty myePa	yWindow Outbox	Manual Task		Kate Bush	19-Apr-2022	08:00	21-Apr-2022 17:00	
Auto Enrolme feeds	ent - generate notices and	Manual Task		Kate Bush	19-Apr-2022	08:00	22-Apr-2022 17:00	
Auto Enrolme	ent - upload feed	Manual Task		Kate Bush	19-Apr-2022	08:00	22-Apr-2022 17:00	
Close period		Manual Task		Kate Bush	19-Apr-2022	08:00	22-Apr-2022 17:00	
Open period		Open Run			19-Apr-2022	08:00	22-Apr-2022 17:00	

lient:	1 Frequency 4 Wkly Period 14	Default \$	Process:	Weekly - Paid Thursdays	Group:	Weekly - Thursday	
iew:	Publish Details	\$					
Step Name		Job Type		Number Of Items	Overrid	25	
Check open ru	n details	Initialise Process					
Client info rece	eived - Ready to process	Manual Task					
DPS Notificatio	ons count check	DPS Check					
Download DPS	Notifications	Manual Task					
Download AE	Opt Outs	Manual Task					
Enter data		Manual Task					
Calculate payro	ll	Manual Task					
Internal approv	val	Internal Approval					
Upload review	reports to myePayWindow	Manual Task					
Client approva	I.	Client Approval					
Pay employees	- submit payment files	Manual Task					
Upload final re	ports to portal	Manual Task					
Create Full Pay	ment Submission	Manual Task					
Submit Full Pag	ment Submission	Send FPS					
Upload payslip	s and P45s to myePayWindow	Empty Outbox		9			🕼 Override
Empty myePay	Window Outbox	Manual Task					
Auto Enrolmer	t - generate notices and feeds	Manual Task					
Auto Enrolmer	t - upload feed	Manual Task					
Close period		Manual Task					
Open period		Open Run					

Using the drop down for View select Publish Details then Edit:

Against the Empty Outbox step click on **Override**:

Override Publish Date Details								
Step Name:	Upload payslips a	nd P45s to myePayWindow						
Branch Changes:	N/A							
Cost Centre Changes:	N/A							
Department Changes:	N/A							
Employee Changes:	N/A							
Employee Anonymisation:	N/A							
Payslips:	0	Day(s) Before Pay Day						
CIS Statements:	0	Day(s) Before Pay Day						
P45s:	0	Day(s) Before Pay Day						
Documents:	0	Day(s) Before Pay Day						

Complete the **Publish date(s)** information, if they are to be published to the employees on pay day leave it as zero, otherwise enter the number of days before pay day.

Click on **OK** then **Save**.

Please Note: if you upload both Payslips and CIS Statements in the same Empty outbox step, the CIS Statements publish date is applied to Payslips.

Preview process schedule prior to initiating

It is possible to preview the Process schedule (and step dates and times within the process) for all client's in this group prior to committing this process to live operation.

From the Edit Group screen, select Clients:

요 Edit Group - Wee	kly - Thursday		Client Process Ovende Save 2 Clore
Group Details	Enabled \$	Details Settings	
Processes	Helping Hands	Client Ref:	нн
Clients	Williams Farm Shop	Client Name:	Helping Hands
	Add/Remove	Datafile Name:	PSDHelpingHands
5		Status:	Enabled •
:		Connected to myePayWindow:	Yes
,			

Highlight a Client, select Client Process Override:

nt:	Helping Hands	¢	Process:	Weekly - Paid Thursdays	G	roup: Weekly - Thursday
w:	Overview / Process Prev	view +				
Step Name		Job Type		User	Scheduled	Due
Check open rur	details	Initialise Process				
Client info recei	ved - Ready to process	Manual Task		Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
DPS Notificatio	ns count check	DPS Check			04-Oct-2021 08:00	05-Oct-2021 17:00
Download DPS	Notifications	Manual Task		Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Download AE C	pt Outs	Manual Task		Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Enter data		Manual Task		Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Calculate payro	II	Manual Task		Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Internal approv	al	Internal Approval		Mat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Upload review i	eports to myePayWindov	w Manual Task		Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Client approval		Client Approval			04-Oct-2021 08:00	05-Oct-2021 17:00
Pay employees	- submit payment files	Manual Task		Pat Ternity	05-Oct-2021 08:00	05-Oct-2021 17:00
Upload final rep	ports to portal	Manual Task		Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Create Full Payr	nent Submission	Manual Task		Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Submit Full Pay	ment Submission	Send FPS			05-Oct-2021 08:00	07-Oct-2021 17:00
Upload payslip: myePayWindov		Empty Outbox			05-Oct-2021 08:00	07-Oct-2021 17:00
Empty myePay\	Vindow Outbox	Manual Task		Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Auto Enrolment feeds	- generate notices and	Manual Task		Pat Ternity	05-Oct-2021 08:00	08-Oct-2021 17:00
Auto Enrolment	- upload feed	Manual Task		Pat Ternity	05-Oct-2021 08:00	08-Oct-2021 17:00
Close period		Close Run			05-Oct-2021 08:00	08-Oct-2021 17:00
Open period		Open Run			05-Oct-2021 08:00	08-Oct-2021 17:00

The process shown will be based on the Groups details for Frequency, Period Number and Tax Year, using the Timetable for each step and the pay day set at group level unless overridden at client level.

Initiating the Process schedule for live usage

Once you are happy that a process contains all the required steps, with their start dates and due dates configured to suit your needs, you need to change the Schedule from Design to Ready. The first process for each client within the group that are enabled, are created based on the Frequency, Period Number and Tax Year under the Group details.

From the Edit Group screen select Processes from the left menu, then highlight the process and select the Schedule tab:

🔉 Edit Group - Weekly - Thursday 🛛 🖉 Girnt Prozess Overniek 🖉 Siree 🕽 2008									
Group Details	+	Enabled	٥	Process	Steps	Schedule			
Processes	Weekly - I	Paid Thursdays		C			Derive		
Clients		,		Status:			Design	Ŧ	

You will see the Status is shown as Design, using the drop down select Ready:

요 Edit Group - Wee	Client Process Override Save Close		
Group Details	+ Enabled	Process Steps Schedule	
Processes	Weekly - Paid Thursdays		
Clients		Status:	Design Ready Disabled
			Desian

Click on **Save**, the process is now live.

Once the first process has been created by vPA the Status is automatically changed to Active.

Editing existing groups

How to add a Client to an existing group

From the left menu **Groups** click on the '+' symbol for the group that you want to add a client to:

IRIS =	The PayrollPro Bureau							O Pat Terr	nity 🝷 🗏	
vPA Dashboard	Groups (Advanced Filters Applied)									
virtual Payroll Assistant	Search Clear						Status: Enabled =	Sorted: Name =	By: 1	
🖄 Groups										
12 Teams	Name	Frequency	Period Number	Tax Year	Pay Day/Date	Region	Assigned Team	Status		
요 Clients	🔀 Monthly - Changes - End of Month	Monthly	5	2022	31	England	Office 1	INABLED	+	
Month View	🔛 Monthly - No Changes	Monthly	5	2022	28	Scotland	Office 1	INABLED	+	
Process Progress	🔚 Weekly - Directors	Weekly	21	2022	Monday	England	Directors	ENABLED	-	
Step Progress										
 Planned Processes 	Edit Delete Disable									
 Planned Steps 	🔝 Weekly - Thursday	Weekly	20	2022	Thursday	England	Office 1	ENABLED	+	
E Logs								Showing record 1 to 4	4 of 4 item(s)	
virtual Payroll Admin										
Admin Settings							•	port as CSV Expo	ert as XLSX	
\land Log out										

Click on Edit:

Edit Group - W	eekly - Directors		🖪 Client Process Override 🖌 Save 🔮 C
Group Details	Name:	Weekly - Directors	
Processes	Based on Frequency:	0	
Clients	Frequency:	Weekly	
	Period Number:	19	
	Tax Year:	2021	
	Based on Pay Day:	0	
	Pay Day:	Monday	
	Region:	England	\$
	Do not adjust for bank holidays:	0	
	Do not adjust for weekends:	0	
	Team Assignment:	Directors	Select Team C
	Manual Assignment:	Pat Ternity	Select User Clear
	Status:	Enabled	

Select Clients:

요 Edit Group - Wee	ekly - Directors		Glient Process Override Save Coce
Group Details	Enabled \$	Details Settings	
Process	Amy's Mobile Hair		
	Harry The Gardener	Client Ref:	AMH
	Iron Works	Client Name:	Amy's Mobile Hair
	Robin Electrician	Datafile Name:	AMYSHOMEHAIR.MCP
	Tim's Wood Work	Status:	Enabled \$
	Add/Remove	Connected to myePayWindow:	No Refresh

Click on Add/Remove to see the following screen:

Client List			
Available clients: 28		Selected clients: 2	
Search Churr Amy's Mobile Hair AMH AmysHomeHair.mcp Bits And Solo 88 PSDBtsandbots Bite And Solo 88 P	M	Search Special Presents [SP SpecialPresents.mcp Treasure Nursing Home TNH TreasureNursingHome.mcp	Clear
Menagerie Castle MC PSDMenagerieCastle			✓ Save X Discard

Highlight the client under Available clients to add to the Group, then click on it will then appear under Selected clients, now click on Save.

At this point all the clients selected will be checked to ensure they have been opened in the minimum version of IPP before they are added to the group. If this check fails, none of the selected Clients are added to the Group, a message is displayed showing the file names of the clients that need to be opened in IPP.

The client is added in **Design** mode:

요 Edit Group - Weel	kly - No Changes		Client Process Overside 🗸 Save 🕽 Close
Group Details	Design ¢	Details Settings	
Processes	Menagerie Castle	Client Ref:	мс
Clients	Add/Remove	Client Name:	Menagerie Castle
		Datafile Name:	PSDMenagerieCastle
		Status:	Design •
		Connected to myePayWindow:	Yes

In design mode you can then customise the client level settings via Client Process Override and under the Settings tab for:

- Manual Assignment.
- Override Pay Day.

Once you have made the changes ensure you click on Save.

You can select **Process Preview** to see the clients first process, to ensure it meets your clients and business requirements. Also select the **Assignment Overview** to ensure the manual steps are assigned to the correct users.

When you are happy with the clients set up, change the Status from **Design** to **Enabled** using the drop down:

요 Edit Group - Wee	kly - No Changes			Client Process Override	iave 1 Close
Group Details	Design ¢	Details Settings			
Processes	Menagerie Castle	Client Data	uc		
		Client Ref:	MC		
	Add/Remove	Client Name:	Menagerie Castle		
			PSDMenagerieCastle		
		Status:	Design		۰
		Connected to myePayWindow:	Design Enabled		

Click on Save.

The clients first process will be created based on the Groups details for Frequency, Period Number and Tax Year.

How to disable a Client in an existing group

From the left menu **Groups** click on the '+' symbol for the group that you want to disable a client to:

IRIS =	The PayrollPro Bureau							\rm O Pat Terni	ty 🔹 🗏
vPA Dashboard	Groups (Advanced Filters Applied)							+ New Group	Refresh
virtual Payroll Assistant	Search Search Clear						Status: Enabled *	Sorted: Name =	By: 12
🗟 Groups									
	Name +	Frequency	Period Number	Tax Year	Pay Day/Date	Region	Assigned Team	Status	
A Clients	🔀 Monthly - Changes - End of Month	Monthly	5	2022	31	England	Office 1	ENABLED	+
Month View	🔀 Monthly - No Changes	Monthly	5	2022	28	Scotland	Office 1	INABLED	+
Process Progress	🔝 Weekly - Directors	Weekly	21	2022	Monday	England	Directors	ENABLED	-
 Step Progress Planned Processes 	Cont 🗙 🐃 Edit Delete Disable								
 Planned Steps 	🔝 Weekly - Thursday	Weekly	20	2022	Thursday	England	Office 1	ENABLED	+
Logs virtual Payroll Admin Admin Settings Log out							_	Showing record 1 to 4 in port as CSV Export	

Click on Edit:

요 Edit Group - Wee	kly - No Changes		Client Process Override Save Close
Group Details	Name:	Weekly - No Changes	
Processes		 Ø 	
Clients	Frequency:	Weekly	\$
	Period Number:	34	
	Tax Year:	2020	
	Based on Pay Day:	2 0	
	Pay Day:	Wednesday	\$
	Region:	England	÷ 0
	Do not adjust for bank holidays:	0	
	Do not adjust for weekends:	0	
	Manual Assignment:	Holly Daypay	Select User Clear 0
	Status:	Enabled	•

Select Clients:

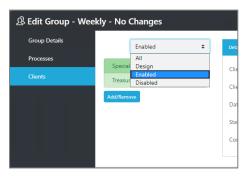
요 Edit Group - Weel	kly - No Changes		Client Process Override Save 2 Gove
Group Details	Enabled +	Details Settings	
Processes	Special Presents	Client Ref:	SP
Clients	Treasure Nursing Home	Client Name:	Special Presents
	Add/Remove	Datafile Name:	SpecialPresents.mcp
		Status:	Énabled ÷
		Connected to myePayWindow:	Yes

Click on Add/Remove to see the following screen:

Available clients: 28	Selected clients: 2	
Search- Any's Mobile Hair AMH Amystometisticrop Bits And Boost Bit PSDBsandboos Bits And Boost Bit PSDBsandboos Carpets Gales Col PSDCampetidate Carpets Gales Col PSDCampetidate Concely Accountants CAI PSDCampetidate Concely Accountants CAI PSDCampetidates Concely Accountants CAI PSDCampetidates Data Solitons SDI DataGalesteramp Fathings Hout HIT ESDSphanghlishing Hairy The Galester HIT Langthal Carbon Hairy The Galester HIT DataGalesteramp Hairy The Galester HIT Langthal Carbon Hairy The Galester HIT Langthal Carbon Hairy Mark HIT ESDSphanghlishing Hairy Hair HIT PSDFsphanghlishing Hairy Hairy HIT HIT HIT Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy Hairy	Sourch Special Presents [59 [specialPresents.mop Treasure Nursing Home TNH TreasureNursingHome.mop	Oor

Highlight the client under Selected clients to remove from the Group, then click on *k* it will then appear under Available clients, now click on **Save**.

If the client had a process created for this group, they will be **Disabled** and show under **Clients** tab of **Edit Group** when you change from Enabled to All or Disabled:



If the client did not have a process created for this group, they will be deleted from the group.

Click on Save to the Edit group screen to save your changes.

Please note that when the client is disabled and they have a process in progress, the process will stop from the next step that has not started.

How to reactivate a Client in an existing group

From the left menu **Groups** click on the '+' symbol for the group that you want to reactivate a client to:

IRIS =	The PayrollPro Bureau							O Pat Ternit	ty 🕶 🗏
YPA Dashboard	Groups (Advanced Filters Applied)							+ New Group	Refresh
virtual Payroll Assistant	Search Search Clear						Status: Enabled =	Sorted: Name =	By: 1
🖄 Groups									
🐨 Teams	Name 4	Frequency	Period Number	Tax Year	Pay Day/Date	Region	Assigned Team	Status :	
요 Clients	🔀 Monthly - Changes - End of Month	Monthly	5	2022	31	England	Office 1	ENABLID	
Month View	🔀 Monthly - No Changes	Monthly	5	2022	28	Scotland	Office 1	ENABLED	
Process Progress	📜 Weekly - Directors	Weekly	21	2022	Monday	England	Directors	ENABLED	+
Step Progress	🔀 Weekly - Thursday	Weekly	20	2022	Thursday	England	Office 1	ENABLED	+
O Planned Processes								Showing record 1 to 4 o	of 4 item(s)
 Planned Steps 							_		
🖴 Logs								port as CSV Export	as XLSX
virtual Payroll Admin									
Admin Settings									
🙆 Log out									

Click on Edit:

요 Edit Group - Mor	thly - Changes - Middle of Mor	nth	Client Process Override Save Cose
Group Details	Name:	Monthly - Changes - Middle of Month	
Process	Based on Frequency:	0	
Clients	Frequency:	Monthly	\$
	Period Number:	7	
	Tax Year:	2021	
	Based on Pay Day:	0	
	Pay Day:	15	
	Region:	Wales	٥ 0
	Do not adjust for bank holidays:	Θ	
	Do not adjust for weekends:	•	
	Team Assignment:	Office 2	Select Team Clear
	Manual Assignment:	Olive Vertime	Select User Clear 🛛
	Status:	Enabled	\$

Select Clients and above the list of clients change Enabled to Disabled:

B Edit Group - Monthly - Changes - Middle of Month					
Group Details	Disabled \$	Details Settings			
Process	Shiny Jewellers				
Clients		Client Ref:	SJ		
	Add/Remove	Client Name:	Shiny Jewellers		
		Datafile Name:	SHINVJEWELLERS.MCP		
		Status:	Disabled \$		
		Connected to myePayWindow:	Ves		

Click on Add/Remove to see the following screen:

vailable clients: 29		Selected clients: 1	
Search	Clear	Search	Clea
Menagerie Castle MC PSDMenagerieCastle	-	Shiny Jewellers SJ ShinyJewellers.mcp	
Mike's Motorbike Shop MMS PSDMikesMotorbikeShop			
Nuggets Nursery NN NuggetsNursery.mcp			
Robin Electrician RE RobinElectrician.mcp			
Shelly's Cycle Shop SCS ShellysCycleShop.mcp			
Smiths Decorators SD PSDSmithsDecorators	н		
Special Presents SP SpecialPresents.mcp			
Spick And Span Cleaners SSC SpickandSpanCleaners.mcp	K		
Sweet Bites Factory SBF SweetBitesFactory.mcp			
Tim's Wood Work TWW TimsWoodWork.mcp			
Tommy's Timber Yard TTY PSDTommysTimberYard			
Treasure Nursing Home TNH TreasureNursingHome.mcp			
Wallanders Windows & Doors WWD PSDWallandersWindowsDoors			
Williams Farm Shop WFS WilliamsFarmShop.mcp			
Willows Surgery WS PSDWillowsSurgery			

Highlight the disabled client(s) shown under Available clients to add to the Group, then click on they will then appear under Selected clients, now click on Save.

The client is reactivated in **Design** mode, with the same information as before for Manual Assignment, Override Pay Day and Override Approval Steps:

요 Edit Group - Mon	& Edit Group - Monthly - Changes - Middle of Month							
Group Details	Design ¢	Details Settings						
Processes	Shiny Jewellers	Client Ref:	SJ					
Clients	Add/Remove	Client Name:	Shiny Jewellers					
		Datafile Name:	ShinyJewellers.mcp					
		Status:	Design \$					
		Connected to myePayWindow:	Yes					

In design mode you can then review and customise these client level settings for:

- Manual Assignment.
- Override Pay Day.
- Override Approval Steps.

Once you are happy with the client set up ensure you click on Save.

You can select **Client Process Override** to see the clients new process, to ensure it meets your clients and business requirements, under **View** select **Manual Task Assignment** to ensure the manual steps are assigned to the correct users.

When you are happy with the clients set up, change the Status from **Design** to **Enabled** using the drop down:

요 Edit Group - Mon	thly - Changes - Middle of Mo	nth	Client Process Override Save Close
Group Details	All 🗢	Details Settings	
Process	Shiny Jewellers	Client Ref:	
Clients	Add/Remove		SJ
	Padurechiore	Client Name:	Shiny Jewellers
		Datafile Name:	SHINVJEWELLERS.MCP
		Status:	Design ¢
		Connected to myePayWindow:	Design Enabled

Click on Save.

The clients new process will be created based on the Groups details for Frequency, Period Number and Tax Year.

Modifying the steps

You can modify the steps in the same manner as when you first set up the group, detailed in this document under the heading **Customising steps in a Group Process**. This will not affect processes that have already been created for clients attached to the group, the changes will take effect for new processes that are created when the automated step **Create next process** is run.

How to delete an unused Process from an existing group

If you have just created a new group or added a new process to a group which has not been initiated to make it live, you can delete the process.

From the left menu **Groups** click on the '+' symbol for the group that you want to delete the process:

INIRIS									
vPA Dashboard	Groups (Advanced Filters A	Groups (Advanced Filters Applied)							C Refresh
virtual Payroll Assistant	Search Search Clear						Status: Enabled -	Sorted: Name -	By:
& Groups									
🗑 Teams	Name	Frequency (Period Number	Tax Year 👔	Pay Day/Date	Region :	Assigned Team	: Status	
A Clients	国 Four Weekly	Four Weekly	1	2021	29-Apr-2021	England		ENABLED	-
 Month View Process Progress 	C7 x m≱ Est Deste Diabe								
: Step Progress	Monthly - Changes - End of Month	Monthly	11	2021	31	England	Office 1	ENABLED	+
 Planned Processes 	10 Monthly - No Changes	Monthly	11	2021	28	Scotland	Office 1	ENABLED	+
 Planned Steps 	📴 Weekly - Changes	Weekly	42	2021	Wednesday	Northern Ireland	Office 1	ENABLED	+
Logs	Westley Disasters	Mar al de		2024		Factoria	Directory		

Click on Edit:

A Edit Group - Fou	r Weekly		Client Process Override
Group Details	Name:	Four Weekly	
Process	Based on Frequency:	 9 	
Clients	Frequency:	Four Weekly	¢
	Period Number:	1	
	Tax Year:	2021	
	Based on Pay Day:	θ	
	Pay Date:	Select Pay Date Apr 29, 2021	×
	Region:	England	¢ 0
	Do not adjust for bank holidays:	ΟΘ	
	Do not adjust for weekends:	Ο	
	Team Assignment:		Select Team Clear
	Manual Assignment:		Select User Clear 0
	Status:	Enabled	¢

Select Process:

요 Edit Group - Four	r Weekly							Client Process Overrid	e 🗸 Save	1 Close
Group Details	+	Enabled	٥	Process Ste	teps :	ichedule				
Process	Four Wee	kly		Name:			Four Weekly			
				Status:			Enabled			¢
				Based on Pay						
				Manual Assig	gnment:			Selec	t User Clea	ar

The click on the delete icon

Delete process?					
Are you sure you want to delete 'Four Weekly' ?					
✓ Delete X Cancel					

Select Delete.

요 Edit Group - Four	r Weekly		Client Process Override	1 Close
Group Details	+	Enabled o		
Process				
Clients				

Then Save.

You are now able to add a new template, by clicking on the + sign.

Add process					
Select the template to base you	ur new process on and enter a name:				
Selected template:	\$	Preview			
Name:					
	✓ Save	X Cancel			

Select the template using the drop down, the Preview button is now enabled:

Add process							
Select the template to base your new process on and enter a name:							
Selected template:	Process Payroll - Monthly	¢	Preview				
Name:							
		✓ Save	X Cancel				

Click on the **Preview** button to view the steps within the selected template:

itep Name	Јор Туре	Start		Due	
Theck open run details	Initialise Process				
Client info received - Ready to process	Manual Task	08:00	1 Day Before Due	17:00	6 Days Before Pay Day
DPS Notifications count check	DPS Check	08:00	1 Day Before Due	17:00	6 Days Before Pay Day
Download DPS Notifications	Manual Task	08:00	1 Day Before Due	17:00	6 Days Before Pay Day
Download AE Opt Outs	Manual Task	08:00	1 Day Before Due	17:00	6 Days Before Pay Day
Enter data	Manual Task	08:00	2 Days Before Due	17:00	4 Days Before Pay Day
Calculate payroll	Manual Task	08:00	2 Days Before Due	17:00	4 Days Before Pay Day
nternal approval	Internal Approval	08:00	2 Days Before Due	17:00	4 Days Before Pay Day
Upload review reports to myePayWindow	Manual Task	08:00	1 Day Before Due	17:00	4 Days Before Pay Day
Client approval	Client Approval	08:00	2 Days Before Due	17:00	3 Days Before Pay Day
Pay employees - submit payment files	Manual Task	08:00	1 Day Before Due	17:00	2 Days Before Pay Day
Upload final reports to myePayWindow	Manual Task	08:00	3 Days Before Due	17:00	On Pay Day
Create Full Payment Submission	Manual Task	08:00	3 Days Before Due	17:00	On Pay Day
Submit Full Payment Submission	Send FPS	08:00	3 Days Before Due	17:00	On Pay Day
Upload to myePayWindow	Empty Outbox	08:00	3 Days Before Due	17:00	On Pay Day
Empty myePayWindow Outbox	Manual Task	08:00	3 Days Before Due	17:00	On Pay Day
Auto Enrolment - generate notices and feeds	Manual Task	08:00	8 Days Before Due	17:00	5 Days After Pay Day
Auto Enrolment - upload feed	Manual Task	08:00	8 Days Before Due	17:00	5 Days After Pay Day
Close period	Manual Task	08:00	5 Days Before Due	17:00	5 Days After Pay Day
Open period	Open Run	08:00	6 Days Before Due	17:00	6 Days After Pay Day

Click on **Close** to close the preview screen.

If the selected template is the one you require, complete the Name then click on Save.

How to set up Teams

Use Teams to monitor progress of the payrolls for separate departments or offices.

Create Teams and allocate users to each team, a user can be in one or more teams.

Then allocate the Team to each Group, this can be done via Teams or by Editing the Group. When a Group is assigned to a Team, when you edit the Groups user assignment for Manual and Internal approvals, the User list only includes Users assigned to the Team.

Based on the vPA Role assigned to a user restricts Teams as follows:

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Edit Group	Yes	No	No
View Group only	No	Yes	Yes
Add Group	Yes	No	No
Delete Group	Yes	No	No
Team page	Yes	Yes	No
Add Team	Yes	No	No
Edit Team	Yes	No	No

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Delete Team	Yes	No	No
View Team Only	No	Yes	No
Clients page	Yes	Yes	No
Groups page	Yes	Yes	a) Groups that haveno Team assignmentb) Groups assigned tothe team that the userbelongs to
Process Progress page	Yes	Yes	a) Processes that have no Team assignmentb) Processes assigned to the team that the user belongs to
Step Progress page	Yes	Yes	a) Steps that have no Team assignmentb) Steps assigned to the team that the user belongs to
Planned Processes page	Yes	Yes	 a) Planned Processes that have no Team assignment b) Planned Processes assigned to the team that the user belongs to
Planned Steps page	Yes	Yes	 a) Planned Steps that have no Team assignment b) Planned Steps assigned to the team that the user belongs to
Schedule checking for vPA Updates	Yes	No	No
Schedule installing vPA Updates	Yes	No	No

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Schedule a vPA Engine Shutdown	Yes	No	No
Restart vPA services	Yes	Yes	Yes
Admin Settings	Yes	No	No
User Settings	Yes	Yes	Yes

Team page

Team page is where this user sets up and edit teams, including amending Users and Groups assigned to each team.

Add a team

IRIS =	The PayrollPro Bureau			0	Pat Ternity ${\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle -}}}}}} {\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle -}}}}} {\scriptstyle {\scriptstyle {\scriptstyle -}}} {\scriptstyle {\scriptstyle {\scriptstyle {\scriptstyle -}}}} {\scriptstyle {\scriptstyle {\scriptstyle -}}} {\scriptstyle {\scriptstyle -}} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -}} {\scriptstyle -} {\scriptstyle -}} {\scriptstyle -} -} {\scriptstyle -} -} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -} -} {\scriptstyle -} {\scriptstyle -} {\scriptstyle -} -} {\scriptstyle -} -} {\scriptstyle -} -} {\scriptstyle -} {\scriptstyle -} -} {\scriptstyle -} -} {\scriptstyle -} -} {\scriptstyle -} -} -} - -} - -} - - -} - - - -} - - -} - - - -} - - -} - - - -} - - -$
vPA Dashboard	Teams			+ New 1	eam 🛛 🕫 Refresh
virtual Payroll Assistant	Search Search Clear			Status: Enabled - Sorted: Tea	n Name = By: 4
. Groups					
😁 Teams	Team Name	Assigned Users	Assigned Groups	Status	1
. Clients	🐸 Directors	1	1	ENABLED	+
Month View	🐸 Office 1	2	3	ENABLED	•
Process Progress	🐸 Office 2	2	4	ENABLED	+
Step Progress				Showing	ecord 1 to 3 of 3 item(s)
 Planned Processes 					
 Planned Steps 				Export as C	V Export as XLSX
🖉 Logs					
virtual Payroll Admin					
Admin Settings					
🖄 Log out					

Under the **Teams** page select **New Team**:

Add Team		Save 1 Cancel
Name:		
Assigned Users:	0 Selected	View/Select Users
Assigned Groups:	0 Selected	View/Select Groups

Enter a Name for the Team, then click on View/Select Users:

Assigned Users	
NOTE: If you remove a user from a Team and they linked to that Team, these assignments will be cle	y have Process Steps assigned to them within Groups or Processes eared.
Available Users: 4	Selected Users: 0
Search Clear	Search Clear
Holly Daypay ^ Mat Ternity Olive Vertime Pat Ternity	X
	Save X Discard

On the left side of the screen, you will see the Available Users and, on the right, the Selected Users, you must select at least one user. Highlight the User on the left side of the screen then click . To remove the User from the Selected User list, highlight the User and click on .

Click on Save to the Assigned Users screen.

In the Edit Team screen click on View/Select Groups to allocate them to this Team:

ssigned Groups	
DTE: Changing the Team assigned to a Group will potentially re ernal approvals within that Group.	emove the user assignment of manual tasks and
Available Groups: 60	Selected Groups: 0
Search Clear	Search Clear
_A 1 Validation 2020 Director NI Create FPS 2020 Employee Create FPS NI Bands Mthly 2020 Employee Create FPS NI Bands Wkly Audit auto updater Backup monthly Calc - NI - Monthly Calc - NI - Weekly 2 Calc - NI - Weekly 2 Calc - NI - Weekly 2 Calculation messages - weekly Calculation messages - weekly Cancel and Rerun Check Planned Processes	

On the left side of the screen, you will see the Available Groups and, on the right, the Selected Groups. Highlight the Group on the left side of the screen then click . To remove the Group from the Selected Group list, highlight the Group and click on .

Click on Save to the Assigned Groups screen.

Now select **Save** on the Edit Team screen, to save the Team.

Deleting a Team

You can Delete a Team if it has not been allocated to a Group where a process has been created with the Team allocated.

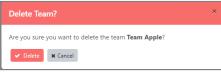
Under **Teams** page:

arch Search Clear			us: Enabled * Sorted: Team Nam	e * By:
eam Name	Assigned Users	Assigned Groups	Status :	
Feam Advanced	3	1	ENABLED	+
Feam Apple	1	0	ENABLED	+
🔮 Team B	4	1	ENABLED	+
🔮 Team C	3	1	ENABLED	+
Feam Directors	2	0	ENABLED	+
Feam myepaywindow	1	1	ENABLED	+
			Showing record	1 to 6 of 6 ite

Click on the plus symbol on the row of the Team that you want to delete:

		+ New Team	2 Refresh
	Stat	us: Enabled * Sorted: Team Nam	e * By: I
1 Assigned Users	Assigned Groups	Status 1	
3	1	ENABLED	+
1	0	ENABLED	-
4	1	ENABLED	+
3	1	ENABLED	+
2	0	ENABLED	+
1	1	ENABLED	+
	4 3	4 Assigned Users Assigned Groups 1 3 1 0 1 4 0 1 1 5 1 1 1 1 6 1 1 1 1 7 4 1 1 1 8 4 1 1 1 9 0 1 1 1	Image: Source of So

Click on **Delete**:



If you want to proceed select **Delete**, validation is then performed before the Team is deleted to ensure it has not been allocated to a Group where a process has been created with the Team allocated. A warning message will be displayed if this is the case informing you that you are then only able to mark the team as Disabled, the Team will not be deleted:



If you are able to delete the Group the above message will not be displayed and the Team will be deleted and disappear from the grid.

When a Team is deleted, the Team is then removed from Group(s) and any user assignments set up within the Group(s) will remain.

Disabling a Team

You can Disable a Team even if it has been allocated to a Group where a process has been created with the Team allocated.

Under **Teams** page:

				e * By:
eam Name	Assigned Users	Assigned Groups	Status	
Fram Advanced	3	1	ENABLED	+
🔮 Team Apple	1	0	ENABLED	+
Paam B	4	1	ENABLED	+
🔮 Team C	3	1	ENABLED	+
Team Directors	2	0	ENABLED	+
Faam myepaywindow	1	1	ENABLED	+
			Showing record	1 to 6 of 6 ite

Click on the plus symbol on the row of the Team that you want to disable:

arch Search Clear		Stat	us: Enabled * Sorted: Team Nam	e * By:
eam Name	Assigned Users	Assigned Groups	Status	
ean rane	Assigned osers	Assigned Groups	status	
Faam Advanced	3	1	ENABLED	+
🔮 Team Apple	1	0	ENABLED	-
Image: Contract of the state of th				
	4	1	DVALD	+
Edit Delete Disable	4 3	1	EMALE) EMALED	+
Edit Delete Disable				

Click on **Disable**:

Disable Team?	×
Are you sure you want to disable the team Team Apple ? All groups currently assigned to this Team will no longer have a Team assigned to them.	
✓ Disable ★ Cancel	

If you want to proceed select Disable.

When a Team is disabled, the Team is then removed from Group(s) and any user assignments set up within the Group(s) will remain. Any created processes with the Team allocated will not be affected.

Removing user from a Team

If you remove a user from a Team, where under Group Edit form the user is assigned to manual and approval tasks, the assignments will be cleared.

Validation is performed when saving this change in case any Rejected Approvals are currently assigned to the user under Action Required By. If there is a Rejected Approval in this state, you will not be able to remove the user until the Rejected Approval has been dealt with.

When removing a user from a Team, the assignments will also be cleared from created processes where the manual or approval task has not been completed. If the user has already completed the manual or approval task the user will remain on the task, for assignment, completed by, rejected approvals as well as if the task was re-assigned to the user.

If manual or approval tasks have been completed by the user who has since been removed from the Team, and the step is re-run, the user will be retained on the completed task(s), the new task generated will not be assigned to that user.

Under the created process the removed user will no longer appear in the list of users for re-assigning or editing steps.

Adding a User to a Team

When you add a user to a Team, they will be available to assign to manual and approval tasks under Group Edit screen where the Group is assigned to that Team.

For created processes you can re-assign steps to the new user, for manual and approval tasks.

Adding a Group to a Team

When you add a Group to a Team, where the Group was not previously allocated to a Team, if a user has been assigned to manual and/or approval tasks within the Group, the assignment will be retained. For any users not to the Team, the assignment will be cleared.

Changing a Team allocated to a Group

When you change a Group from one Team to another Team by either Editing the Team or the Group, all user assignments are cleared for manual and internal approvals.

Removing a Team from a Group, or a Group from the Team

If you remove a Group from a Team by either Editing the Team or the Group, the user assignment for manual and approvals is retained.

Advanced Filters

Once you have set up Teams, you are able to use Advanced Filters to see All Teams or those that you as a user have been assigned to My Teams:

vPA Dashboard	Teams			+ New Team	C Refresh	 ○ ○ ○ ○
virtual Payroll Assistant	Search Clear		Status: Enabled *	Sorted: Team Name *	Byr 🚹	Filters Apply O Reset
🖻 Groups					_	Show:
🗑 Teams	Team Name 1	Assigned Staff	Assigned Groups	Status 1		• All Teams O My Teams
요 Clients	👑 Team A	3	2	FNARLED	+	
Month View	🐭 Team Advanced	2	0	ENABLED	+	
Process Progress	😁 Team B	3	0	INABLED	+	
😑 Step Progress	😁 Team C	3	1	INABLED	+	
 Planned Processes 	😤 Team D	1	0	ENABLED	+	
O Planned Steps	👹 Team Directors	2	0	ENABLED	+	
🖉 Logs			* 		•	

Select My Teams, then Apply:

vPA Dashboard	Teams (Advanced Filt	ers Applied)		+ New Team	C Refresh	0 0
virtual Payroll Assistant	Search Search Clear		Status: Enabled =	Sorted: Team Name -	By: 11	Filters C Reset
. Groups					_	Show:
😁 Teams	Team Name 1	Assigned Staff	Assigned Groups	Status :		All Teams O My Teams
요 Clients	😁 Team A	3	2	INABID	+	
Month View	警 Team Advanced	2	0	ENABLED	+	
Process Progress	🐸 Team B	3	0	ENABLED	+	
😑 Step Progress	👑 Team C	3	1	ENABLED	+	
 Planned Processes 						

Or select All Teams then Apply.

Groups page

Under the grid there are columns for Assigned Team and Region:

earch Clear						Status: Enabled • So	rted: Name -	By:
Name	1 Frequency	Period Number	Tax Year 🔅	Pay Day/Date 🔅	Region 0	Assigned Team	Status	
📴 Monthly - Changes - End of Month	Monthly	7	2021	31	England	Office 1	ENABLED	+
🔯 Monthly - No Changes	Monthly	7	2021	28	Scotland	Office 1	ENABLED	+
📴 Weekly - Changes	Weekly	27	2021	Wednesday	Northern Ireland	Office 1	ENABLED	+
🔯 Weekly - Directors	Weekly	28	2021	Monday	England	Directors	ENABLED	+
📴 Weekly - Thursday	Weekly	26	2021	Thursday	England	Office 1	ENABLED	+

The Advanced filters allow filtering on:

- Team
- Frequency
- Period Number
- Tax Year
- Region

Groups (Advanced Fi	iters App	Jieuj				+ New Group	C Ref	resir	 ○ ◎ ○
Search Search Clear					Status: Enab	led • Sorted: Na	ame • By:	41	Filters Apply Rese
									Team:
Name ↓	Frequency :	Period Number 🔅	Tax Year 🔅	Pay Day/Date 🔅	Region :	Assigned Team 🗅	Status 🔅		Unassigned X Directors X Office 1 X Office 2 X
🔯 Monthly - Changes - End of Month	Monthly	7	2021	31	England	Office 1	ENABLED	+	Frequency:
🔯 Monthly - No Changes	Monthly	7	2021	28	Scotland	Office 1	ENABLED	+	
🔯 Weekly - Changes	Weekly	27	2021	Wednesday	Northern Ireland	Office 1	ENABLED	+	Period Number:
😟 Weekly - Directors	Weekly	28	2021	Monday	England	Directors	ENABLED	+	
🔯 Weekly - Thursday	Weekly	26	2021	Thursday	England	Office 1	ENABLED	+	Tax Year:
					-				
						Showing recor	rd 1 to 5 of 5 i	item(s)	Region:

A **vPA Operator** will only see information for Groups where the assigned team is either unassigned, or a team which the user is a part of.

New Group Wizard

In the first screen of the New Group Wizard you are able to allocate the group to a Team:

New Group Wizard	- Details (1/4) Next -> I Cancel
	and specify whether you want it to be based on Pay Day and/or Frequency. Note that if on Pay Day then it is required to also be based on Frequency.
Name:	
Based on Frequency:	Θ
Frequency:	\$
Period Number:	
Tax Year:	
Based on Pay Day:	Θ
Pay Day:	
Region:	÷ 0
Do not adjust for bank holidays:	•
Do not adjust for weekends:	0
Team Assignment:	Select Team Clear

Click on Select Team:

user assignment of manual tasks and internal approvals within th up.				
Search			Clear	
Team A				
Team Advanced				
Team B				
Team C				
Team D				
Team Directors				

Highlight the team then click on **Select**.

Group Edit

A Payroll Department Admin user can assign a Team to a Group via the Group Edit screen:

Edit Group - N	Nonthly - Changes - End of Mor	nth	Cient Process Override
Group Details	Name:	Monthly - Changes - End of Month	
Process	Based on Frequency:	2 0	
Clients	Frequency:	Monthly	
	Period Number:	7	
	Tax Year:	2021	
	Based on Pay Day:	0	
	Pay Day:	31	
	Region:	England	٥
	Do not adjust for bank holidays:	•	
	Do not adjust for weekends:	Θ	
	Team Assignment:	Office 1	Select Team Cle
	Manual Assignment:	Mat Ternity	Select User Clear
	Status:	Enabled	

Next to Team Assignment click on Select Team:

e user assignment of manual tasks and internal approvals within tha pup.					
Search			Clear		
	******	******	aaaaaaa; ^		
Team B					
Team C					
Team D Team Odear					
Team Odear Team OMG					
Team Wow					
realiti wow					

Highlight the Team description then click on Select.

Existing User Assignments to Manual tasks and Internal approvals in the Group(s) will be affected as follows:

- New team assigned if user(s) are members of the team assigned to the group they will be retained
- New team assigned if user(s) are NOT members of the team assigned to the group their user assignment will be cleared
- User removed from a Team which is assigned to Group(s) the user assignment is cleared from all Groups assigned to that Team
- Existing Team assignment changed to a different Team all user assignments are cleared
- Remove Team assignment the user assignment is retained

Process Progress page

A column called **Assigned Team** is shown the grid:

	Process Progress (Advar	nced Filters Applie	ed)								0	Refi
ayroll Assistant	Search Search Clear								Status	All •	iorted: Updated -	By:
ms ints	Client	Process	Group	Frequency	Period Number	Tax Year :	Started	Updated	Assigned Team	Status :	Percentage Complete	
nth View	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	FAILED	Ω.	
cess Progress	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	12-Aug-2022 06:30	19-Aug-2022 08:31	Directors	COMPLETED	100	•
ned Processes	Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	RUNNING	8	
med Steps	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	RUNNING	48	
ryroll Admin	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	5	2022	16-Aug-2022 17:01	18-Aug-2022 16:06	Office 1	RUNNING	52	
nin Settings	Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022 08:30	18-Aug-2022 08:31	Directors	BUNNING		
g out	Amv's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	11-Aug-2022	18-Aug-2022	Directors	COMPLETED	100	

Team is available under Advanced Filters:

arch Search C	lear						Status:	All - Sor	ted: Updated •	By: 17	Filters Apply O Res
											Unassigned X Directors X Office 1 X
lient	Process	Group	Frequency	Period Number (Tax Year :	Started	Updated _†	Assigned Team	Status	Percentage Complete	Client:
pick And Span Cleaners SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct- 2021 11:26	01-Oct- 2021 11:57	Office 1	RUNNING	43	Process:
pick And Span Cleaners SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	25	2021	27-Sep- 2021 17:23	01-Oct- 2021 11:26	Office 1	COMPLETED	100	Groups
luggets Nursery NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep- 2021 17:25	01-Oct- 2021 11:23	Office 1	RUNNING	76	Frequency:
herry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep- 2021 17:25	01-Oct- 2021 11:23	Office 1	RUNNING	76	Period Number:
lelping Hands PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	01-Oct- 2021 11:22	Office 1	RUNNING	76	Tax Year:
Villiams Farm Shop MILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:26	01-Oct- 2021 11:22	Office 1	RUNNING	76	Started: from
rides And Grooms BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	7	2021	01-Oct- 2021 11:14	01-Oct- 2021 11:14	Office 1	RUNNING	(to Updated:
rides And Grooms BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	6	2021	01-Sep- 2021 11:55	01-Oct- 2021 11:14	Office 1	COMPLETED	100	from Fri, Sep 24, 2021 2:42 PM
iome Improvements HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep- 2021 17:28	01-Oct- 2021 11:13	Office 1	RUNNING	43	
like's Motorbike Shop 25DMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	7	2021	01-Oct- 2021 11:12	01-Oct- 2021 11:13	Office 1	RUNNING	(

By default, the Team filter is populated with the teams that the logged in user is assigned to, as well as processes where no team is assigned.

A **vPA Operator** will only see information for processes where the assigned team is either unassigned, or a team which the user is a part of.

Planned Processes page

A column called **Assigned Team** is shown in the grid:

	Planned Processes (Advanced	d Filters Applied)					Last L	Jpdated: 14	-Aug-2022 00:00	Update	C Refresh
rtual Payroll Assistant	Search Search Clear								Sorted: Fire	a Stop Start Date +	8/
Groups	5600 GW								20meu.	stop start cone -	-95- E
Teams Clients	Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax ; Year	Assigned Team	Schedule Status	
Month View	Duke Solicitors (DUKESOLICITORSIMCP)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	10-Aug-2022 08:00	01-Sep-2022 17:00	Monthly	5	2022	Office 1	ACTIVE.	1
Process Progress	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	10-Aug-2022 08:00	29-Aug-2022 17:00	Monthly	5	2022	Office 1	active)	3
Step Progress	Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	15-Aug-2022 08:00	19-Aug-2022 17:00	Weekly	20	2022	Office 1	(2502)	
Planned Processes	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	15-Aug-2022 08:00	19-Aug-2022 17:00	Weeky	20	2022	Office 1	ACTIVE	
Planned Sleps	Brides And Grooms (BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	16-Aug-2022 08:00	02-Sep-2022 17:00	Monthly	5	2022	Office 1	(151171)	
Logs al Payroll Admin	Mike's Motorbike Shop (PSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	16-Aug-2022 08:00	05-Sep-2022 17:00	Monthly	5	2022	Office 1	ACTIVE	
Admin Settings	Crunchy Accountants (PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	16-Aug-2022 05:00	05-Sep-2022 17:00	Monthly	5	2022	Office 1	(1000)	
	Smiths Decorators (PSDSmithsDecorators)	Monthly - No Changes	Monthly - No Changes	17-Aug-2022 08:00	05-5ep-2022 17:00	Monthly	5	2022	Office 1	(1997)	



Planned Processe Applied)	S (Auvance	ed Fillers	>		Last Upo	lated: 26-Se	p-2021 00	t00 Upda	C Re	fresh	○ ③ Filters ✓ Apply
iearch Search (Clear						Sorted	First Step Star	t Date • By	: IE	Team:
Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status		Unassigned X Directors X Office 1 X V
Crunchy Accountants PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	15- Sep- 2021 08:00	04- Oct- 2021 17:00	Monthly	6	2021	Office 1	ACTIVE	+	Process
vlike's Motorbike Shop PSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	15- Sep- 2021 08:00	04- Oct- 2021 17:00	Monthly	6	2021	Office 1	ACTIVE	+	Frequencys
miths Decorators PSDSmithsDecorators)	Monthly - No Changes	Monthly - No Changes	15- Sep- 2021 08:00	06- Oct- 2021 17:00	Monthly	6	2021	Office 1	ACTIVE	•	Period Number:
helly's Cycle Shop SHELLYSCYCLESHOP.MCP)	Monthly - No Changes	Monthly - No Changes	16- Sep- 2021 08:00	05- Oct- 2021 17:00	Monthly	6	2021	Office 1	ACTIVE	•	Tax Year:
Aenagerie Castle PSDMenagerieCastle)	Monthly - No Changes	Monthly - No Changes	17- Sep- 2021 08:00	06- Oct- 2021 17:00	Monthly	6	2021	Office 1	ACTIVE	•	Scheduled:
'ommy's Timber Yard PSDTommysTimberYard)	Monthly - No Changes	Monthly - No Changes	17- Sep- 2021 08:00	06- Oct- 2021 17:00	Monthly	6	2021	Office 1	ACTIVE	•	from Fri, Oct 1, 2021 2:45 PM × ^{to} Sun, Oct 3, 2021 11:59 PM ×

By default, the Team filter is populated with the teams that the logged in user is assigned to, as well as processes where no team is assigned.

A **vPA Operator** will only see information for processes where the assigned team is either unassigned, or a team which the user is a part of.

Month View page

You can filter using the Assigned Team:

	Mon	th View													Ø Refre
ual Payroll Assistant	Client:				~	Step Ty	pe:				✓ Assigned T	eam:			
Groups													Inassigned		
Teams	Assigned	User:			Ŷ								irectors iffice 1		
Clients	Tasks By I	Day							Friday, 19th Aug	gust 2022		_	rfice 2		
Month View				Augus	+ 2022				Client	Stop Name	Process Name	Due Date	: Step Type	: Assigned	; Status
Process Progress	Mo		ue W	-		'n	Sat	Sun	Crunchy Accountants #SDCrunchAccountants)	Calculate payroll	Monthly - Changes - End of Month	19-Aug-2022 17:00	Merson Task	Pat Ternity	Ready
		1	2	3	4	5	6	201	Cruschy Accountants (PSDCruschAccountants)	Internal approval	Monthly - Changes - End of Month	19-Aug-2022 17:00	Internal Approval	Pat Ternity	Not Ready
Step Progress	46	15 47	15 45	10 45	58				Crunchy Accountants (PSDCrunch/accountants)	Upicad review reports to muRiPa/Window	Monthly - Changes - End of Month	19 Aug 2022 17:00	Menual Task	Pat Ternity	Not Ready
Nanned Processes	48	° 1 47	43	¹⁰ 5 49	5 40	12	13	14	Country Homes COUNTRY-FOMES.MCP	Create IPS	Marthly - No Changes	19 Aug 2022 17:00	Create FPS		Net Ready
Planned Steps	53	15	16	17 56	18 10 70	19 32	20	2	Country Homes	Empty myeRayWindow	Marthly - No Cranges	19-Aug 2022 17:00	Menal Text	Rat Tarreity	Not Ready
logs	53	42 22	23	24	25	26	27	21	Country Homes	Outbox Upinal to mysReyWindow		19-Aug 2022 17:00	Empty Outbox		Not Ready
I Payroll Admin	67	26 58	18 74	14 64	23 82	33			(COUNTRYHOMES.MCP) Country Homes	Submit Full Payment					
	2	29	30 13 54	31 11 51					(COUNTRYHOMES.MCP) Country Homes	Submission	Monthly - No Changes	19-Aug-2022 17:00	Send RPS		Net Ready
Admin Settings	_								(COUNTRYHOMES.MCP)	Upload final reports to mysRey/Window	Monthly - No Changes	19-Aug-2022 17:00	Manual Task	Pat Ternity	Ready
	low	medium 🔤 high 📕	planned created						Fighting Fit Gym (PSDFightingFit Gym)	Client info received - Ready to process	Monthly - Changes - End of Month	19-Aug-2022 17:00	Manual Task	Pat Ternity	Ready
									Fighting Fit Gym (PSDFightingFit Gym)	DPS Notifications count check	Monthly - Changes - End of Month	19-Aug-2022 17:00	DPS Check		Not Ready

Select the drop down for Assigned Team to select one or more available from the list, they will then be used to filter the records.

A **vPA Operator** will only see information for Steps from processes where the assigned team is either unassigned, or a team which the user is a part of.

Step Progress page

Team is available under Advanced Filters:

IRIS =	The	PayrollPro Bureau												\rm Pat Ternity 🛛 🗐
O vPA Dashboard	Ste	ep Progress (Advan	ced Filte	ers Appl	ied)							😂 Rei	tresh	O ●
virtual Payroll Assistant	Sear	rch Search Clear								Status: Al	- Sorted:	Due - By	1E.	Filters Rest
Groups														Team
🗑 Teams		Client Process Group Step Type Scheduled Started Due Completed User Status										V		
. Clients									19-					User:
Month View		Tim's Wood Work (TIMSWOODWORK.MCP)	Weekly - Directors	Weekly - Directors	Close period	Close Run	16-Aug- 2022 08:00	16-Aug- 2022 08:30	Aug- 2022	16-Aug- 2022 08:30		COMPLETED	+	×
Process Progress								08:30	17:00					Client
III Step Progress		Tim's Wood Work)® Weekly -	Weekly -	Open period	Open Run	16-Aug-	16-Aug- 2022	19- Aug-	16-Aug-		COMPLETED		~
 Planned Processes 		(TIMSWOODWORK.MCP)	Directors	Directors	ogen period	Open Kun	2022 08:00	08:30	2022 17:00	2022 08:30		COMPLETED	÷.	Process:
 Planned Steps 						Create		16-Aug-	19-					~
€ Logs		Tim's Wood Work (TIMSWOODWORK.MCP)	Weekly - Directors	Weekly - Directors	Create next process	Next Process	16-Aug- 2022 08:00	2022 08:30	Aug- 2022 17:00	16-Aug- 2022 08:30		COMPLETED	٠.	Group:
virtual Payroll Admin														
 Admin Settings Log out 		Iron Works (IRONWORKS.MCP)	Weekly -	Weekly - Directors	Submit Full Payment	Send FPS	17-Aug- 2022 08:00	17-Aug- 2022	19- Aug- 2022	17-Aug- 2022 08:30		COMPLETED		Step:
 Log out 			U-CLIOT J	D-CCIU-1	Submission		2022 00.00	08:00	17:00					Туряс
			Weekhy -	Weekly -	Create Full	Create	17-Aug-	17-Aug-	19- Aug-	17-Aug-				· · · · · · · · · · · · · · · · · · ·
		Iron Works (IRONWORKS.MCP)	Directors	Directors	Payment Submission	FPS	2022 08:00	2022 08:00	2022 17:00	2022 08:00		COMPLETED	1	Exclude Reran Steps:
									19.					

By default, the Team filter is populated with the teams that the logged in user is assigned to, as well as processes where no team is assigned.

A **vPA Operator** will only see information for Steps from processes where the assigned team is either unassigned, or a team which the user is a part of.

Planned Steps page

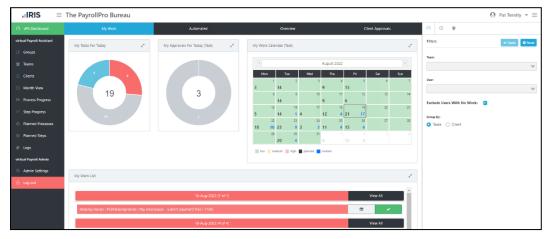
Team is available under Advanced Filters:

. IRIS ≡	The PayrollPro Bureau											😗 Pat Ternity 👻 🗏
O vPA Dashboard	Planned Processes (Ad	vanced Filte	rs Applied)			La	t Updated: 1	4-Aug-202	2 00:00 Up	odate 🛛 🛪 Re	fresh	O 0 0
virtual Payroll Assistant	Search Search Clear							So	rted: First Step S	itart Date = 0	c 4	Filters Apply O Reart
Teams Clients	Client	Process :	Group	First Step Start Date 4	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status		[Unassigned №] Directors №] Office 1 №]
Month View Process Progress	Duke Solicitors (DUKESOLICITORS.MCP)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	10-Aug- 2022 08:00	01-Sep- 2022 17:00	Monthly	5	2022	Office 1	ACTIVE	+	Cient:
Step Progress	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	10-Aug- 2022 08:00	29-Aug- 2022 17:00	Monthly	5	2022	Office 1	ACTIVE	•	Procesc V
Planned Processes Planned Steps	Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	15-Aug- 2022 08:00	19-Aug- 2022 17:00	Weekly	20	2022	Office 1	ACTIVE	+	Group:
₽ Logs	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	15-Aug- 2022 08:00	19-Aug- 2022 17:00	Weekly	20	2022	Office 1	ACTIVE	+	Frequency:
virtual Payroll Admin Admin Settings 	Brides And Grooms (BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	16-Aug- 2022 08:00	02-Sep- 2022 17:00	Monthly	5	2022	Office 1	ACTIVE	•	Period Number:
🕙 Log out	Mike's Motorbike Shop (PSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	16-Aug- 2022 08:00	05-Sep- 2022 17:00	Monthly	5	2022	Office 1	ACTIVE	+	Tax Year:
	Crunchy Accountants (PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	16-Aug- 2022 08:00	05-Sep- 2022 17:00	Monthly	5	2022	Office 1	ACTIVE	•	Schedule Status:
	Contraction (COT on the Description)	Monthly - No	Monthly - No	17-Aug-	05-Sep-	Martin		0.000	Official	_		×

By default, the Team filter is populated with the teams that the logged in user is assigned to, as well as processes where no team is assigned.

A **vPA Operator** will only see information for Steps from processes where the assigned team is either unassigned, or a team which the user is a part of.

vPA Dashboard



Under the Filters for the vPA Dashboard you can select one or multiple Teams, when you click Apply are reflected under the pages in the counts. When a filter is applied, they are also reflected when using the drilldowns:

My Work tab:

- My Tasks for Today doughnut widget
- My Approvals for Today doughnut widget
- My Work Calendar widget
- My Work List widget
- Rejected Internal Approvals widget

Automated tab:

- Failed/Warning/Completed/Scheduled widgets
- Action Required widget

Overview tab:

• Today's Work breakdown widget

- Today's work doughnut widget
- Weekly work breakdown widget
- Work Calendar widget

Client Approvals tab:

- Approval Calendar widget
- Rejected Internal Approvals widget
- Today's Breakdown
- Today's Approvals doughnut widget

A **vPA Operator** will only see information for Steps from processes where the assigned team is either unassigned, or a team which the user is a part of.

Using Payroll Professional and vPA day-to-day

vPA website

System Alerts

At the top of each webpage, when either a vPA service is not running or an engine shutdown has been scheduled today an alert will be shown to the user to inform them of the following:

- Scheduling Engine Service is not running
- Payroll Resource Server Service is not running
- Engine Shutdown has been scheduled today (Server Restart)

When you see a **System Alert**:

,IRIS ≡	The PayrollPro Bureau			🛛 Pat Ternity 👻
vPA Dashboard		s	ystem Alerts (1)	
virtual Payroll Assistant		Automated	Overview	Client Approvals
. Groups	My Tasks For Today	My Approvals For Today (Task)	My Work Calendar (Task)	2
🗑 Teams				

Click on the row to see details regarding the alert:

IRIS	E The PayrollPro Bureau			${f O}$ Pat Ternity ${{\scriptstyle ullet}}$
vPA Dashboard		System .	Alerts (1)	
virtual Payroll Assistant		The Payroll Resource Server	service is not running.	×
8 Groups				
👹 Teams	My Work	Automated	Overview	Client Approvals

When the issue is due to one of the services not running, then click on the burger icon in the top right-hand corner and select the **Service Status**:

0	¢	(i)	φ		
Servi	ce Statu	15		2 Refret	sh
	uling Eng	jine		Resource Server	
Runnir	ng			Running	
Payrol	I Resourc	e Server		Auto Updater	
Stoppe	ed		Sta	Stopped	

Then click on **Start**, give vPA a few minutes to restart the service then select **Refresh** to ensure the service is running again.

Monitoring progress

Use **vPA Dashboard** to monitor the progress of:

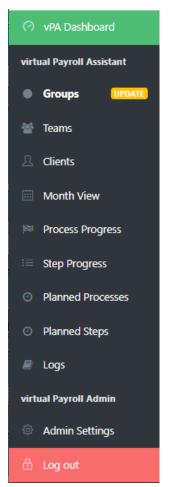
- Your own work under the My Work tab
- Automated steps progress for all clients payrolls due today under the Automated tab
- An overview of manual tasks for all client payrolls due today by user under the Overview tab
- See the progress of Client Approvals due by today for all clients under the Client Approvals tab

	My Work		Automated		0	eniew			Client	Approvals	
Payroll Assistant			My Approvals For Today (Task)								_
roups	My Tasks For Today	1	My Approvals For Today (Task)	My Work	Calendar (Task)						
vams				e			Augus	# 2022			•
ents				M	on T	2 v	uod Th	NU F	d 5	Sat 6	Sun
onth View	19		3	3	8	0	9	15	12	13	
ocess Progress	10		Ŭ		14	15	9	6	19	20	
p Progress	50			5	14	1 4 23	12	4 21 25	17	27	
nned Processes				10	10 23	9 3 20	3 11	4 15	6		
nned Steps					20	4	6		4		
D2				kw	medium 📕 high	planned 🚺 create	đ				
nayroll Admin											
g out	My Work List										
			16-Aug-2022 (1 of 1)							view All	
	Helping Hands PSDHelpingHands Pay emplo										
	Helping Hands [PsUHelpingHands [Pay empt	oyees - submit pay									
			18-Aug-2022 (4 of 4)							view All	
			19-Aug-2022 (10 of 17)					_		view All	
			22-Aug-2022 (10 of 10) 23-Aug-2022 (9 of 9)					_		riew All	
			25-Aug-2022 (9 of 9) 24-Aug-2022 (3 of 3)					-		riew All	_
			24-Aug-2022 (s of s) 25-Aug-2022 (4 of 4)							/icw All	
			25-AUG-2022 (4 014)							ilew Au	

Under each of the tabs you can click on the charts to drill down to see details 'list' information.

How to customise the Low, Medium and High Calendar colours

When you are logged in as a Payroll Department Admin user, you will see in the left-hand menu Admin Settings:



Select Bureau:

భి Settings				Save Close
Bureau	Calendar Colours			
Log		From	То	
	Low:	0	50	1
	Medium:	51	150	1 51
	High:	151		1

These settings change the colours shown on the following calendars based on the number of tasks (or client, if selected under Filters):

- My Work Calendar (under vPA Dashboard\My Work)
- Work Calendar (under vPA Dashboard\Overview)
- Approval Calendar (under vPA Dashboard\Client Approvals)
- Tasks by Day (under Month View)

Once you have defined the Low, Medium, and High values, click on Save.

How to see when a client's payroll was started and completed

Under the menu item **Process Progress** use the Advanced Filters to find the client:

. IRIS ≡	The PayrollPro B	ureau											😑 Pat Ternity 👻 🚍
vPA Dashboard	Process Prog	ress (Adv	anced F	ilters Ap	plied)						Ø Re	fresh	 ⑦ ●
virtual Payroll Assistant	Search	Search Clear							Status:	All • Sort	eck Updated * Bj	e 17	Filters V Apply O Reset
 Teams Clients 	Client	: Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	: Status :	Percentage Complete		۷
Month View	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	17	2022	17-Aug-2022 15:53	18-Aug-2022 16:18	Office 2	RUNNING	52	+	Client: Bits And Bobs (PSDBitsandBobs) X
Process Progress	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	16	2022	17-Aug-2022 15:25	17-Aug-2022 15:53	Office 2	COMPLETED	100	+	Process:
 Planned Processes 	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	15	2022	17-Aug-2022 14:47	17-Aug-2022 15:25	Office 2	COMPLETED	100	+	Group:
 Planned Steps Logs 	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	14	2022	17-Aug-2022 13:58	17-Aug-2022 14:47	Office 2	COMPLETED	100	+	Y Frequency:
virtual Payroll Admin	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	13	2022	17-Aug-2022 11:25	17-Aug-2022 13:58	Office 2	COMPLETED	100	+	×
 Admin Settings Log out 	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	12	2022	17-Aug-2022 09:42	17-Aug-2022 11:25	Office 2	COMPLETED	100	+	Period Number:
	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	11	2022	16-Aug-2022 16:45	17-Aug-2022 09:42	Office 2	COMPLETED	100	+	Tas Year:
	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	10	2022	16-Aug-2022 14:10	16-Aug-2022 16:45	Office 2	COMPLETED	100	+	Started:
	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	9	2022	27-Jun-2022 16:22	16-Aug-2022 14:10	Office 2	COMPLETED	100	+	from
	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekiy - Friday	Weekly	8	2022	27-Jun-2022 14:04	27-Jun-2022 16:22	Office 2	COMPLETED	100	+	Updated:
	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	7	2022	20-May-2022 14:01	27-Jun-2022 14:04	Office 2	COMPLETED	100	+	from
	Bits And Bobs	Weekly -	Weekly -	Weekly	6	2022	19-May-2022	20-May-2022	Office 2	COMPLETED	100		to

Click on the '+' symbol for the row you want to see the information for:

,IRIS ≡	The PayrollPro Bu	reau												Θ Pat Ternity \star \equiv
⑦ vPA Dashboard	Process Progre	ess (Adva	nced Fi	lters Ap	plied)						0	Refresh	0 () (P	
virtual Payroll Assistant	Search 54	rch Clear							Status:	All 👻 Sorta	d: Updated +	By: 17	Filters	✓ Apply O Reset
 Groups 													Team:	
👹 Teams	Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete			~
.1. Clients	Bits And Bobs	Weekly -	Weekly -				17-Aug-2022	18-Aug-2022				-	Client:	
Month View	(PSDBitsandBobs)	Fridays	Friday	Weekly	17	2022	15:53	16:18	Office 2	BUNNING	2	1.	Bits And Bobs (PSDBitsandBobs) X	×
Process Progress													Process:	
Step Progress	View Steps Process	Info Pause P	rocess											~
 Planned Processes 	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	16	2022	17-Aug-2022 15:25	17-Aug-2022 15:53	Office 2	COMPLETED	100		Group:	
 Planned Steps 														~

Now select Process Info, you will see the first tab called General:

/eekly - Fridays - D	Details 100
General Details Pr	operties Notes
Process UID:	259a934f-7743-4a65-927f-4eca34208ca0
Process Name:	Weekly - Fridays
Created:	27-Sep-2021 17:21
Started:	27-Sep-2021 17:21
Last Updated:	01-Oct-2021 11:27
Percentage Completed:	76%
Status:	Running
Assigned Team:	Office 2

Details tab

/eekly - Fridays -	
General Details F	Properties Notes
Frequency:	Weekly
Period Number:	26
Tax Year:	2021
Based On Pay Day:	
Pay Day Setting:	Default
Pay Day:	Friday
Original Pay Date:	01-Oct-2021
Adjusted Pay Date:	01-Oct-2021
Region:	Wales
Ignore Bank Holidays:	•
Ignore Weekends:	

Properties tab

General Details	Properties Notes	
Group Name:	Weekly - Friday	
Client Ref:	BB	
Client Name:	Bits And Bobs	
Datafile Name:	PSDBitsandBobs	
Data ID:	16	

Notes tab

/eekly - Frida	ays - Dei	tails			1 Clos
General Detai	ls Prop	erties Notes			
By: 4F	Author:		~	Type:	~
Step Approval Olive Vertime 01-Oct-2021 11:10		(Internal approval Ap	proved) - check	ed	

Process Info can also be accessed via View Steps then use the Actions drop down menu:

Bits And Bobs - W	Veekly - Fridays	(Weekly - Friday)				C Refresh	Actions - I Close
Frequency: Weekly	<i>,</i>	Pe	riod Number: 26		Tax Year:	2021	 View Process Info Show Reran Steps
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Pause Process
Check open run details	Initialise Process			27-Sep-2021 17:21		27-Sep-2021 17:23	X Cancel Process
Client info received - Ready to process	Manual Task	Holly Daypay	28-Sep-2021 08:00	28-Sep-2021 08:00	29-Sep-2021 17:00	01-Oct-2021 11:02	Gantt View

And from the left menu item **Step Progress**, using the advanced filters to find the client, and under **View Process**, which opens the same screen as above.

How to deal with automated step warnings

Automated steps complete with warnings which move on to the next step, which you should review the warnings and take necessary steps based on the reason. These steps are shown in vPA under the vPA Dashboard and the Automated tab in the widget called Warnings:

.IRIS ≡	The PayrollPro Bureau			Θ Pat Ternity ${\sc v}\equiv$
O vPA Dashboard	My Work	Automated	Overview	Client Approvals
virtual Payroli Assistant				
. Groups	1 0-	2 ⁽)-	40	10
🐸 Teams	Failures Today	Warnings Today	Completed Today	Scheduled Today
요 Clients				
Month View				
Process Progress	Action Required			1
💷 Step Progress				
 Planned Processes 	There are currently no steps requiring action.			
 Planned Steps 				

Click on the Warnings widget and you will be taken to the Step Progress screen which will be prefiltered to show the steps with Warnings:

lean	ch Search Clear								Status: Warning	Sorted:	Due * By
	Client :	Process	Group	Step :	Type :	Scheduled :	Started :	Due	Completed :	Assigned User :	Status
	Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Heekdy - Changes	Weekly - Changes	Upload payslips and P45s to myePayWindow	Empty Outbox	30-Sep-2021 08:00	04-Oct-2021 17:25	04-Oct- 2021 17:00	04-Oct-2021 17:25		WARNING
	Helping Hands (PSDHelpingHands)	🛤 Weekdy - Paid Thursdays	Weekly - Thursday	DPS Notifications count check	DPS Check	04-Oct-2021 08:00	04-Oct-2021 17:08	05-Oct- 2021 17:00	04-Oct-2021 17:08		WARNING

You can then view the details of the Step to see a brief description of the warning, note that employee specific warnings are recorded within the payroll data file for you to review in Payroll Professional.

he F	PayrollPro Bureau	Union	d payeline ap	d D45e to m	wePayWindow - Det	aile	_	1 Close				0	Pat Ternity	r 🕶 i
Ste	ep Progress (Advan	Gener		roperties		alls			1				01	Refresh
Searc	ch Search Cear	Step N	Name:	Upload pay	slips and P45s to myePayWindo	w					Status: Warni	ng • Sorted	B Due *	By:
	Client	Job Ty	/pe:	Empty Out	юх					Due	Completed	Assigned	Status	
		Job ID	t:	5ae5fbc4-2	1f0-472b-98d7-8f505de25575				-			User		
	Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Status	2	Warning					21	04-Oct- 2021 17:00	04-Oct-2021 17:25			a -
		Error:		No Employ	ees To Upload									
	/iew Process Step Info													
	Helping Hands (PSDHelpingHands))RI Weekly - Paid Thursdays	Weekly - Thursday	DPS Notifications count check	DPS Check	04-Oct-2021 08:00	04-Oct-20 17:08	021	05-Oct- 2021 17:00	04-Oct-2021 17:08		WARNING	
	ns on (0) selected:													

Click on the '+' symbol against the step you want to view then select Step Info:

A brief description is shown under Error.

Calculate

The following will complete with a Warning:

- Employee marked as suspended.
- Employee marked as absent.
- Employee marked as on holiday.
- Employee already Calculated.
- Date of Birth checks and NI Letters.
- No Director start date.
- Tax Code check where contains letter Y.
- Non-Cumulative Director has a leave date.
- National Minimum and Living Wage reminders.

When this step completes with a **Warning**, we recommend that you review the messages via IPP to decide whether you need to make any changes to the payroll.

Open the data file in IPP then go to Utilities\Query Manager then copy and paste the below query:

SELECT [ProcessMessagesID], [EeDetails].[EeRef], [EeDetails].[Forename], [EeDetails].[Surname], [Date] as [Message Date], Choose(lif(IsNull([Type]),0,[Type])+1,'UNKNOWN','Calculation','Submissions') AS [Program Area], Choose(lif(IsNull([OutcomeType]),0,[OutcomeType])+1,'UNKNOWN','Information','Warning', 'Failure') As [Message Type], [Text], [LinkedID], [vPARunID], [vPARunStepID] FROM ([tblProcessMessages] INNER JOIN [EeDetails] ON [tblProcessMessages].[EeID] = [EeDetails].[EeID]) INNER JOIN [PayrolIRuns] ON CLng([tblProcessMessages].[LinkedID]) = [PayrolIRuns].[RunID]

Click on Run. You can view the information on screen or export the results.

Create FPS

The following will complete as Warnings:

- FPS already created.
- No employees to include.

Send FPS

The following will complete as Warnings:

• FPS already submitted.

Empty Outbox

The following will complete as Warnings:

- Individual Item Validation
- Out of Sync Data
- If nothing is in the myePayWindow outbox, the Empty Outbox step completes as a Warning and the process moves to the No action required step.
- If there is anything in the myePayWindow outbox that has not been selected for the automated step to upload, then the Empty Outbox step will not upload anything to myePayWindow and complete as a Warning, the process moves to the Action required step.
- If one or more of the Outbox items selected for the automated step are not available in the myePayWindow outbox, but there are no Outbox items that have not been selected in the myePayWindow outbox, the step will upload the outbox items, complete as a Warning and move to the No action required step.

Close Run

The following will complete as Warnings:

• Period already closed.

Open Run

The following will complete as Warnings:

• Period already opened.

How to deal with step failures

Failed steps mean the processing stops until the failed step has been dealt with and rerun. These steps are shown in vPA under the vPA Dashboard and the Automated tab in the widget called Action Required:



They give details of the step and a brief description of the cause of the error. Click on the step to be taken to the **View Steps** screen:

elping Hands - W	eekly - Paid Thi	ursdays (Weekly	- Thursday)			C Refrest	Actions -
quency: Weekly		Per	iod Number: 27		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 17:02	05-Oct-2021 17:00	04-Oct-2021 17:02	FAILED
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY

From this screen you can re-run the step once you have dealt with the cause of the failure.

All steps

When each step runs a pre-check is performed to ensure the data file is:

- In the correct run:
- Period number
- Tax year
- Frequency
- Data file is not flagged as a Critical Failure.
- Data file is the minimum version required.
- Data file does not have Bonus Runs enabled.

If the data file is not in the correct run or it is marked as a Critical Failure or is less than the minimum version or has Bonus Runs enabled, then the step will fail.

To resolve this issue in Payroll Professional:

- Ensure the data file is in the correct period number, frequency, and tax year.
- If the data file is flagged as a Critical Failure, you will see a message like the one below, you **must** then restore the data file to a back up
- If the data file is less than the minimum version, open the data file in the latest version of IPP.
- Ensure the data file does not have Bonus Runs enabled.

Once you have resolved the issue in IPP, then re-run the failed step, see the section **How to rerun process step(s)** for a client.

Automated steps

These steps will fail if the client data file is locked open. Ensure that no user has the data file open in Payroll Professional or any utility program e.g. AEX, PRE, PDC or EBS (P11D software). Then re-run the failed step, see the section **How to rerun process step(s) for a client**.

Initialise Process

This step will fail if the client data file has the wrong period number, frequency, or tax year, or flagged as a Critical Failure, or is less than the minimum version. In Payroll Professional ensure the data file is in the correct period number, frequency, and tax year. Then re-run the failed step, see the section **How to rerun process step(s) for a client**.

DPS Check

This step will Fail due to any of the following:

- Authorisation failed in Payroll Professional ensure you have the correct Sender ID and Password entered for Internet Submissions, and the Employer has the correct Tax District and Reference. Then rerun the failed step, see the section How to rerun process step(s) for a client.
- Unable to check one or more notice types you may need to manually check if there are notices to download, the cause maybe the HMRC site is down. If this is the case, once you have manually downloaded the notices you can then override the step as complete, see the section How to manually override a failed automated step.

Calculate

The following will appear as a Failure:

- Negative Taxable (covers various scenarios, combinations of Bfwd Taxable This Emp, Prev Emp and This Period).
- Negative Tax (combination of Bfwd Tax This Emp, Prev Emp and This Period).
- Negative Net Pay.
- Invalid NI Letter.
- From tax year 2025/26, Freeport or Investment Zone NI Letter and no Workplace Postcode
- Unsupported elements found, see Appendix B.

You must review the messages via Payroll Professional and resolve the cause. Then rerun the step (refer to the section **How to rerun process step(s) for a client**).

Create FPS

The following will appear as a Failure:

- Uncalculated employees.
- Last period of tax year, multiple frequencies in data file.
- RTI Applies is not set as Payroll is aligned and RTI applies.

• Unsupported elements found, see Appendix B.

You must review the data file in Payroll Professional and ensure all employees are calculated. Then rerun the step (refer to the section **How to rerun process step(s) for a client**).

Send FPS

The following will appear as a Failure:

• No submission found.

You must review the data file in Payroll Professional.

Once you have resolved the cause then rerun the step (refer to the section How to rerun process step(s) for a client).

Create Report

The following will appear as a Failure:

- Data file not connected to myePayWindow
- No default contact set up in myePayWindow

You must review the data file in Payroll Professional and myePayWindow.

Ensure within the Group Edit screen the Client is showing as connected to myePayWindow, if it shows No then click on **Refresh**:

요 Edit Group - Wee	kly - Directors		Client Process Override Sove Close
Group Details	Enabled \$	Details Settings	
Process	Amy's Mobile Hair		
	Harry The Gardener	Client Ref:	АМН
	Iron Works	Client Name:	Amy's Mobile Hair
	Robin Electrician	Datafile Name:	AMYSHOMEHAIR.MCP
	Tim's Wood Work	Status:	Enabled ¢
	Add/Remove	Connected to myePayWindow:	No Refresh

Ensure a Default contact has been set up in myePayWindow.

Once you have resolved the cause you can either rerun the step (refer to the section **How to rerun process step(s) for a client**) or you can manually override the step as complete due to manually correcting the issue via IPP (refer to the section **How to manually override a failed automated step**).

Empty Outbox

The following will appear as a Failure:

- Data file not connected to myePayWindow
- vPA cannot see the file path where the Documents have been saved

You must review the data file in Payroll Professional.

Ensure within the Group Edit screen the Client is showing as connected to myePayWindow, if it shows No then click on **Refresh**:

ctors			Client Process Override Save Close
Enabled \$	Details Settings		
Mobile Hair			
The Gardener			
orks	Client Name:	Amy's Mobile Hair	
Electrician	Datafile Name:	AMYSHOMEHAIR.MCP	
Vood Work	Status:	Enabled	٥
ove	Connected to myePayWindow:	No	Refresh
	Enabled Mobile Hair The Gardener orks Electrician Vood Work	Enabled Crew Sentop Mobile Hair Client Ref: The Gardener Client Name: Orks Datafile Name: Datafile Name: Status	Enabled December Semiger Mobile Hair Client Ref: AMH The Gardener Client Name: Amy's Mobile Hair orks Datafile Name: AM'SHOMEHAIR.MCP Bioctrician Status: Erubled

If the payroll data file has not been opened in the minimum version of IPP required for vPA, when you click on Refresh a message is displayed that it is not up to date. Open the payroll data file in the latest version of IPP, then in vPA click on Refresh.

Once you have resolved the cause you can either rerun the step (refer to the section **How to rerun process step(s) for a client**) or you can manually override the step as complete due to manually correcting the issue via IPP (refer to the section **How to manually override a failed automated step**).

Close Run

The following will appear as a Failure:

- Empty Outbox still has items to upload.
- AEM has not been completed.
- FPS has not been completed parked, paused or none.
- Employees have not been included in an FPS.
- Employees uncalculated.
- Previous year is open.
- No payslips recorded for the current run.
- Unsupported elements found, see Appendix B.

You must review the data file in Payroll Professional.

Once you have resolved the cause you can either rerun the step (refer to the section How to rerun process step(s) for a client).

How to use emergency override for a failed automated step

You can override a failed automated step as complete, in scenarios where you have dealt with the failure manually and re-running the step, it continues to fail.

Example below is where the automated step **DPS check** has failed.

Whilst in the vPA Dashboard select Automated:

IRIS ≡	The PayrollPro Bureau							\varTheta Pat Ternity 👻
YPA Dashboard	My Work		Automated		Overview	r	Client Ap	provals
virtual Payroll Assistant								
B Groups	1	®-	0	®-	40	0-	10	
🔮 Teams	Failures Today	_	Warnings Today		Completed Today		Scheduled Today	
. Clients								
Month View								
Process Progress	Action Required (1 Steps)							1
Step Progress								
Planned Processes	Helping Hands (PSDHelpingH Due: 05-Oct-2021 17:00 Date	Failed: 04-Oct-2021						
Planned Steps	Error: DPS: Unable To Check Or	e Or More Notificati	on Types					
Logs								
advert Descent & Adverter								

Under the section Action Required, click on the tile:

quency: Weekly		P	eriod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	+
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 17:02	05-Oct-2021 17:00	04-Oct-2021 17:02	FAILED	+
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday) Weekly Period Number: 27 Tax Year: 2021 ency: Scheduled Job Type User Started Due Completed Step Name Status COMPLETED + FAILED 2 Rerun 🔳 Step Info Pat Ternity 04-Oct-2021 08:00 05-Oct-2021 17:00 NOT READY Manual Task

Click on the '+' symbol for the row marked as Failed, in this case the Type called DPS Check:

Under actions select **Step Info**, the screen that appears provides a basic description of the **Error** that caused the step to fail:

PS Notificatio	ns count check - Details
General Details	Properties
Step Name:	DPS Notifications count check
Job Type:	DPS Check
Job ID:	51dc142b-3110-4a56-84cf-c2f3de3ae1d9
Status:	Failed
Error:	DPS: Unable To Check One Or More Notification Types

Click on Close, and then under actions select Rerun:



Select Show Advanced Options:

Rerun DPS Notifications count check?	✓ Rerun Cancel
Are you sure you want to rerun DPS Notifications count check? Using Emergency Override may adversely affect other steps in the process. This should only be used as a last resort.	
Hide Advanced Options	

Tick the **Emergency Override** and enter a reason:

Rerun DPS Notifications count check?	✓ Rerun Cancel
Are you sure you want to rerun DPS Notifications count check?	
Emergency Override: 🕑 0	
Downloaded the notifications via IPP	
Hide Advanced Options	

Then select Rerun:

quency: Weekly		Per	iod Number: 27		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED +
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 17:08	05-Oct-2021 17:00	04-Oct-2021 17:08	WARNING
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY +

The step will be completed as a **Warning**, if you view the **Step info** for this step you will see the **Error** informs the user of the reason:

PS Notificatio	ons count check - Details
General Details	Properties
Step Name:	DPS Notifications count check
Job Type:	DPS Check
Job ID:	37e76d13-7441-45b1-90cf-a90c6c40b73c
Status:	Warning
Error:	Emergency Override

Using the Actions drop down on the toolbar select Process Info, then the Notes tab:

Veekly - Paid	Thursda	ıys - Details	t Clos
General Detail	s Prope	rrties Notes	
By: 47	Author:	У Туре:	~
Step Emergency Override Pat Ternity 04-Oct-2021 17:08		(DPS Notifications count check Emergency Override) - Downloaded via IPP	

You will see reason for overriding the step has been recorded.

How to rerun process step(s) for a client

Rerunning a client payroll process step, can be required because of processing issues, a change from the client or perhaps a failure.

You can access the step Rerun option through the Process Progress and Step Progress left-menu options.

The example below is via **Process Progress**:

IRIS	The PayrollPro Bureau										O Pat Ternity	-
vPA Dashboard	Process Progress (Advan	ced Filters Applie	d)								ØR	Refresh
virtual Payroll Assistant	Search Clear								Status:	All -	iorted: Updated -	0y: 17
. Groups										_		_
Teams Clients	Client :	Process	Group	Frequency :	Period Number :	Tax Year :	Started :	Updated t	Assigned Team :	Status :	Percentage Complete	
Month View	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	FAILED	62	•
Process Progress	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	12-Aug-2022 08:30	19-Aug-2022 08:31	Directors	COMPLETED	100	•
 Planned Processes 	Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	BUNNING	8	•
 Planned Steps Logs 	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	BUNNING	4	•
virtual Payroll Admin	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	5	2022	16-Aug-2022 17:01	18-Aug-2022 16:06	Office 1	RUNNING	92	•
 Admin Settings Cog out 	Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022 08:30	18-Aug-2022 08:31	Directors	RUNNING	0	•
							11-Aug-2022	18-Aug-2022	-			

The Processes shown on this page are pre-filtered with records updated for today. If you need to see earlier processes (e.g. this week or month) then use the burger icon in the top right-hand corner and set the Updated date and time filter accordingly and click Apply.

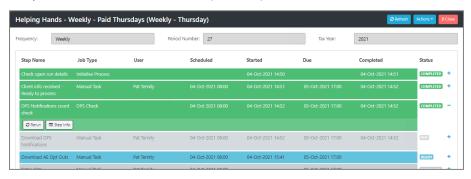
Click the '+' symbol on the row for the client process in which you want to rerun a process step:

Process Progress (Advance	ed Filters Ap	plied)								2 Re	fres
earch Clear								Status:	All - Sor	ted: Updated * By	y:
Client	Process	Group	Frequency	Period Number	Tax Year ≎	Started	Updated †	Assigned Team	Status	Percentage Complete	
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 15:41	Office 1	RUNNING	19	
View Steps Process Info Pause Process											
Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	01-Oct-2021 11:39	04-Oct-2021 15:24	Office 2	PAUSED	76	

Now click on View Steps:

equency: Weekly		Pe	riod Number: 27		Tax Year:	2021		
Step Name	Јор Туре	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY	
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	1
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	1
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	1
Auto Enrolment - generati notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	1

Now click on the '+' symbol for the step that you want to rerun from. Any steps after this will also get re-created and you will be asked to confirm this (see later):



Click Rerun, the following message is displayed:



On some steps there is an **Edit Details** option, for if you need to change anything specific to this step for this process only. This screen changes depending on the step type. Below is an example for a manual step where you can change the Manual Assignment:

Rerun Download	AE Opt Outs?	🗸 Rerun	1 Cancel
Are you sure you want to r	erun Download AE Opt Outs?		
Edit Details:	۵		
Manual Assignment:	Pat Ternity	Select User	Clear

Change the settings as required, then to proceed click **Rerun**.

equency: Weekly		Pe	riod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	+
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	1
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	1
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	1
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	ł
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	ł
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	ł
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	1
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	ł
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	1
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	1
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	1
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	1
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	1
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	1
Auto Enrolment - generati notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	1
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	1
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	ł
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	ł

The steps that were previously completed are re-created with the same timetable as the original steps.

To see the steps that have been rerun (perhaps to support client questions or quality audits), under Actions select Show Reran Steps:

equency: Weekly		P	eriod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	1
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	1
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	1
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	1
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:53	RERAN	1
							RERAN	1
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00	04-Oct-2021 16:47	RERAN	1
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 16:47	05-Oct-2021 17:00	04-Oct-2021 16:49	RERAN	4

If the current step has started and is a manual step when re-run is selected it will be treated as Failed.

If the current step has started and is an automated step, it will need to complete.

Rerun a cancelled process

You can rerun a client's process that has been cancelled only if a process with a later period number for the frequency has not been created.

You can access Rerun through the Process Progress and Step Progress left-menu options.

The example below is via **Process Progress**:

IRIS	The PayrollPro Bureau										O Pat Ternity	
O vPA Dashboard	Process Progress (Advan	ced Filters Applie	d)								ØR	Refresh
virtual Payroll Assistant	Search Clear								Status	All +	Sorted: Updated -	0y: 17
. Groups										_		
📽 Teams	Client	Process	Group	Frequency	Period Number	Tax Year :	Started	Updated	Assigned Team	Status	Percentage Complete	
Month View	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	FAILED	62	
Process Progress	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	12-Aug-2022 08:30	19-Aug-2022 08:31	Directors	COMPLETED	100	•
 Planned Processes 	Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	RUNNING	8	•
 Planned Steps Logs 	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	RUNNING		•
virtual Payroll Admin	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	5	2022	16-Aug-2022 17:01	18-Aug-2022 16:06	Office 1	RUNNING	9	•
 Admin Settings Log out 	Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022 08:30	18-Aug-2022 08:31	Directors	RUNNING	02	•
							11-Aug-2022	18-Aug-2022				

The Processes shown on this page are pre-filtered with records updated for today. If you need to see earlier processes (e.g. this week or month) then use the burger icon in the top right-hand corner, using the advanced filters change the Updated date and time filter accordingly and click Apply.

Click the '+' symbol on the row for the client process in which you want to rerun a process step:

rocess Progress (Advance	ed Filters Ap	plied)								Ø Re	efresh
earch Clear								Status:	All + So	ted: Updated * B;): I
Client	Process :	Group	Frequency :	Period Number	Tax Year ;	Started :	Updated †	Assigned Team ;	Status :	Percentage Complete	
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	27	2021	04-Oct-2021 14:53	04-Oct-2021 16:57	Office 2	CANCELLED	8	-
View Steps Process Info											
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 16:49	Office 1	RUNNING	19	+

Click on View Steps:

equency: Weekly		Perio	od Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:53		04-Oct-2021 14:54	COMPLETED	+
Client info received - Ready to process	Manual Task	Holly Daypay	01-Oct-2021 08:00	04-Oct-2021 14:54	04-Oct-2021 17:00	04-Oct-2021 16:57	FAILED	+
DPS Notifications count check	DPS Check		01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED	+
Download DPS Notifications	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED	+
Download AE Opt Outs	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED	+
Enter data	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED	+
Calculate payroll	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED	+
Internal approval	Internal Approval	Olive Vertime	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED	+

Now click on the '+' symbol for the step that you want to rerun from. Any steps after this will also get re-created and you will be asked to confirm this (see later):

reasure Nursing H	lome - Weekly	- No Changes (We	eekly - No Changes			C Refresh	Actions -
equency: Weekly		Peri	od Number: 27		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			04-Oct-2021 14:53		04-Oct-2021 14:54	COMPLETED
Client info received - Ready to process	Manual Task	Holly Daypay	01-Oct-2021 08:00	04-Oct-2021 14:54	04-Oct-2021 17:00	04-Oct-2021 16:57	FAILED
2 Rerun 🔲 Step Info							
DPS Notifications count check	DPS Check		01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Download DPS Notifications	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Download AE Opt Outs	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Enter data	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Calculate payroll	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Internal approval	Internal Approval	Olive Vertime	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Upload review reports to	Manual Task	Holly Davpay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED

Click Rerun, the following message is displayed:

Rerun Client	info received - Ready to process?	Rerun Cancel
Are you sure you w	ant to rerun Client info received - Ready to process?	
Edit Details:		

To proceed click Rerun.

equency: Weekly		Peri	od Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:53		04-Oct-2021 14:54	COMPLETED	+
Client info received - Ready to process	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	-
DPS Notifications count check	DPS Check		01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	1
Download DPS Notifications	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	1
Download AE Opt Outs	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Enter data	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Calculate payroll	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	÷
Internal approval	Internal Approval	Olive Vertime	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	+

The steps that were previously completed are re-created with the same timetable as the original steps.

To see the steps that have been rerun (perhaps to support client questions or quality audits), under Actions select Show Reran Steps:

equency: Weekly		Perio	od Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:53		04-Oct-2021 14:54	COMPLETED	+
Client info received - Ready to process	Manual Task	Holly Daypay	01-Oct-2021 08:00	04-Oct-2021 14:54	04-Oct-2021 17:00	04-Oct-2021 16:57	RERAN	1
Client info received - Ready to process	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE	1
DPS Notifications count check	DPS Check		01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE	1
Download DPS Notifications	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE	1
Download AE Opt Outs	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE	+
Enter data	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE	+
Calculate payroll	Manual Task	Holly Davpay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE	+

Rerun a paused process

You can rerun a paused process, detailed in this document under the heading <u>Resume paused process but rerun</u> <u>previously completed steps</u>.

How to pause a process for a client

To pause a process and stop any further processing until it is resumed, go to the left-menu **Process Progress**, use the Advanced Filters to find the client:

Process Progre	ess (Ad	vanced	l Filters							2 Re	iresh	0 🕸 0	
Applied)												Filters Apply	8 Reset
Search Sea	arch Clear							Status: All	Sorted:	Updated * By	↓₹	Team:	
													~
Client	Process	Group	Frequency	Period Number 🔅	Tax Year ∶	Started :	Updated †	Assigned Team	Status	Percentage Complete		Client:	
Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	7	2021	27-Sep- 2021 17:02	27-Sep- 2021 17:04	Office 1	RUNNING	e	+	Country Homes (COUNTRYHOMES.MCP) X	~
Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	6	2021	27-Aug- 2021 10:17	27-Sep- 2021 17:02	Office 1	COMPLETED	100	+	Group:	~
									Showing r	record 1 to 2 of 2	item(s)		v
												Frequency:	~
												Period Number:	
													~
												Tax Year:	
													~
												Started:	
												from	
												to	
												Updated:	
												from Mon, Sep 27, 2021 4:32 PM	×
												to	

Click on the '+' symbol for the row you want to see the information for:

Process Progress (Ac	lvanced Filte	ers Applied)								0	Refresh
Search Clear								Status	All •	Sorted: Updated *	By:
Client	Process	Group	Frequency	Period Number ‡	Tax Year 🔅	Started	Updated 1	Assigned Team	Status	Percentage Complete	
Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	7	2021	27-Sep-2021 17:02	27-Sep-2021 17:04	Office 1	RUNNING	8	
View Steps Process Info Pau	use Process										
Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	6	2021	27-Aug-2021 10:17	27-Sep-2021 17:02	Office 1	COMPLETED	100	
									s	howing record 1 to 2 o	f 2 iter

Select Pause Process, the following screen will appear for you to enter a reason for pausing the process:



Once you have entered the reason click on Confirm.

No further processing can be done until the process is resumed.

If an automated step is running when you try to Pause the process this needs to complete before it can be paused.

Resume paused process to continue from where it was paused

Go to the left menu **Process Progress**, use the Advanced Filters to find the client, then click on the '+' symbol for the row you want to see the information:

earch Search Clear								Status:	All 👻	iorted: Updated * B
lient	Process	Group	Frequency	Period Number ្	Tax Year 🔅	Started	Updated _†	Assigned Team ‡	Status	Percentage Complete
Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	7	2021	27-Sep-2021 17:02	27-Sep-2021 17:04	Office 1	PAUSED	8
View Steps Process Info Re	Isume Process									
Country Homes COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	6	2021	27-Aug-2021 10:17	27-Sep-2021 17:02	Office 1	COMPLETED	100

Now select Resume Process, you will see the below screen showing the reason that was entered as to why the process was paused:

Resume Process	
This process was paused on 04-Oct-2021 16:34 by Pat Ternity.	
The reason for pausing was:	
Awaiting further information from client, before processing can be started	
Are you sure you want to resume the process?	
✓ Confirm 21	Back

Click on **Confirm** to resume the process.

Resume paused process but rerun previously completed steps

Go to the left menu **Process Progress**, use the Advanced Filters to find the client, then click on the '+' symbol for the row you want to see the information:

Process Progress (Advance	ed Filters Ap	plied)								0	Refres
earch Search Clear								Status:	All 👻 So	rted: Updated *	By:
Client	Process	Group	Frequency	Period Number 🕄	Tax Year 👔	Started	Updated 1	Assigned Team	Status	Percentage Complete	
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 15:41	Office 1	RUNNING	19	
Villows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	01-Oct-2021 11:39	04-Oct-2021 15:24	Office 2	PAUSED	76	
View Steps Process Info Resume Proce	55										
Spick And Span Cleaners	Weekly - Changes	Weekly -	Weekly	26	2021	01-Oct-2021	04-Oct-2021	Office 1	RUNNING	76	

Click on View Steps:

equency: Weekly		Perio	d Number: 26		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			01-Oct-2021 11:39		01-Oct-2021 11:39	COMPLETED
Client info received - Ready to process	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:39	29-Sep-2021 17:00	01-Oct-2021 11:40	COMPLETED
DPS Notifications count check	DPS Check		28-Sep-2021 08:00	01-Oct-2021 11:40	29-Sep-2021 17:00	01-Oct-2021 11:40	COMPLETED
Download DPS Notifications	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:40	29-Sep-2021 17:00	01-Oct-2021 11:40	N/A
Download AE Opt Outs	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:40	29-Sep-2021 17:00	01-Oct-2021 11:40	COMPLETED
Enter data	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Calculate payroll	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Internal approval	Internal Approval	Olive Vertime	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Upload review reports to myePayWindow							COMPLETED
Client approval	Client Approval		28-Sep-2021 08:00	01-Oct-2021 11:42	29-Sep-2021 17:00	01-Oct-2021 11:42	COMPLETED
Pay employees - submit payment files			25 sep-202 \ 01:10	S1-6-22021 11:42			COMPLETED
Upload final reports to portal	Manual Task	Holly Daypay	29-Sep-2021 08:00	01-Oct-2021 11:42	01-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
Create Full Payment Submission	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 14:53	01-Oct-2021 17:00	04-Oct-2021 14:53	COMPLETED
Submit Full Payment Submission	Send FPS		29-Sep-2021 08:00	04-Oct-2021 14:53	01-Oct-2021 17:00	04-Oct-2021 15:24	COMPLETED
Upload payslips and P45s to myePayWindow							COMPLETED
Empty myePayWindow Outbox	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 15:24	01-Oct-2021 17:00	04-Oct-2021 15:24	N/A
Auto Enrolment - generati notices and feeds	e Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 15:24	04-Oct-2021 17:00		READY
Auto Enrolment - upload feed	Manual Task	Holly Daypay	29-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY
Close period	Close Run		29-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY
Open period	Open Run		29-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY

Click on the '+' symbol for the step that you want to rerun from:

equency: Weekly		Per	iod Number: 26		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			01-Oct-2021 11:39		01-Oct-2021 11:39	COMPLETED
Client info received - Ready to process	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:39	29-Sep-2021 17:00	01-Oct-2021 11:40	COMPLETED
DPS Notifications count check	DPS Check		28-Sep-2021 08:00	01-Oct-2021 11:40	29-Sep-2021 17:00	01-Oct-2021 11:40	COMPLETED
Download DPS Notifications	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:40	29-Sep-2021 17:00	01-Oct-2021 11:40	N/A
Download AE Opt Outs	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:40	29-Sep-2021 17:00	01-Oct-2021 11:40	COMPLETED
Enter data @ Rerun Step Info	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Calculate payroll	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Internal approval	Internal Approval	Olive Vertime	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Upload review reports to myePayWindow	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:41	29-Sep-2021 17:00	01-Oct-2021 11:41	COMPLETED
Client approval	Client Approval		28-5-0-2021 02:00	01-0:1-2021 11:42	29-Sep-2021 17:00	01-Oct-2021 11:42	COMPLETED

Click on **Rerun**, you will see the below screen showing the reason that was entered as to why the process was paused:

Rerun Enter data?	✓ Rerun
This process was paused on 02-Jun-2020 13:43 by Pat Ternity.	
The reason for pausing was:	
Awaiting client to confirm employees start date	
Rerunning Enter data will mean that all steps from Enter data up to and including Pay employees - so be re run.	ubmit payment files will
The step Pay employees - submit payment files will also be signed off and marked as failed.	
Edit Details:	

Click on Rerun to resume the process and rerun from this step.

How to cancel the current process for a client

There maybe a couple of reasons for Cancelling a process:

- Cancel this and future periods you want to stop processing this client via vPA altogether.
- Cancel this period only you do not want this period to be processed via vPA, as you have dealt with it manually, but future periods you want vPA to continue processing.

Cancel this and future periods

To stop any future periods processes being created, before you cancel the current process you need to disable the client within the group. If you do not disable the client within the group before cancelling the process, as soon as the period number associated to this group is increased (when a process for a different client in the group is completed), the process for the next period for this client will be created.

Under the left menu **Groups** click on the '+' symbol for the group that the client you want to disable is located:

Name	1	Frequency 0	Period Number	Tax Year 🔅	Pay Day/Date 🔅	Region 3	Assigned Team	Status	
Monthly - Changes - End of Month		Monthly	7	2021	31	England	Office 1	ENABLED	+
🛛 Monthly - Changes - Middle of Month		Monthly	7	2021	15	Wales	Office 2	ENABLED	•
ঘ Monthly - No Changes		Monthly	7	2021	28	Scotland	Office 1	ENABLED	+
🛂 Weekly - Changes		Weekly	27	2021	Wednesday	Northern Ireland	Office 1	ENABLED	+
💆 Weekly - Directors		Weekly	28	2021	Monday	England	Directors	ENABLED	+
🛂 Weekly - Friday		Weekly	26	2021	Friday	Wales	Office 2	ENABLED	+
🛂 Weekly - No Changes		Weekly	27	2021	Wednesday	England	Office 2	ENABLED	+
🔄 Weekly - Thursday		Weekly	27	2021	Thursday	England	Office 1	ENABLED	-

Select Edit:

요 Edit Group - W	eekly - Thursday		Client Process Override Save Cose
	Name:	Weekly - Thursday	
Process	Based on Frequency:	 Ø 	
Clients	Frequency:	Weekly	\$
	Period Number:	27	
	Tax Year:	2021	
	Based on Pay Day:	0	
	Pay Day:	Thursday	٥
	Region:	England	¢ 0
	Do not adjust for bank holidays:	. 9	
	Do not adjust for weekends:	0	
	Team Assignment:	Office 1	Select Team Clear
	Manual Assignment:	Pat Ternity	Select User Clear 0
	Status:	Enabled	¢

Highlight **Clients** on the left menu:

요 Edit Group - Weel	kly - Thursday		Client Process Override
Group Details	Enabled \$	Details Settings	
Process	Helping Hands		
Clients		Client Ref:	нн
	Williams Farm Shop	Client Name:	Helping Hands
	Add/Remove	Datafile Name:	PSDHelpingHands
		Status:	Enabled \$
		Connected to myePayWindow:	Ves

Now select Add/Remove:

Available clients: 28		Selected clients: 2	
Search	Clear	Search	Cle
Amy: Mobile Hair (JAH) (AUK-BONGENIRANCP Bits And Bobs (JB) (SDBItsmallos) Bits And Bobs (JB) (SDBItsmallos) Bits And Bobs (JB) (SDBItsmallos) Bits And Bobs (JB) (SDBItsmallos) SDBIts (JB) (SDBITSB) (SDBITSB) (SDBITSB) Charles (SDBITSB)		Helping Hands HH PSDHelpingHands Williams Farm Shop WFS WILLIAMSFARMSHOP.MCP	

Highlight the client under Selected clients that you want to disable, and click on the select Save.

Click on Save in the Edit Group screen.

Now follow the procedure under the following heading Cancel this period only.

Cancel this period only

Go to the left menu **Process Progress**, using the Advanced Filters search for the client:

											Filters Apply O
h Clear							Status: All 👻	Sorted:	Jpdated * By	17	Team:
Process	Group	Frequency	Period Number ()	Tax Year :	Started	Updated †	Assigned Team	Status	Percentage Complete		Client:
Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	7	2021	01-Oct- 2021 11:12	01-Oct- 2021 11:13	Office 1	RUNNING	E	+	Mike's Motorbike Shop (PSDMikesMotorbikeShop) ×
Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	6	2021	27-Sep- 2021 14:11	01-Oct- 2021 11:12	Office 1	COMPLETED	100	+	Group:
								Showing r	ecord 1 to 2 of 2	item(s)	Period Number:
											Tax Year:
											Started:
											from to
											Updated: from Mon, Sep 27, 2021 4:23 PM
	Monthly - Changes - End of Monthly - Changes - End of	Monthly Changes - End of Month Monthly Changes - End of Changes - End of Changes - End of Changes - End of	Monthly Monthly Changes Change	Monthly - Changes - End of Month Monthly - Changes - End of Month Monthly - Changes - End of Month Monthly - Changes - End of Monthly Monthly - Changes - End of Monthly Monthly - Changes - Changes - Changes Monthly - Changes - Changes - Changes Monthly - Changes - Changes - Changes Monthly - Chan	Monthly Changes - End of Monthly Monthly - Changes - End of Monthly Monthly - Changes - End of - Changes - Changes Monthly Monthly Number 2021	Monthly Changes - End of Monthly Monthly - Changes - End of Monthly Monthly - Changes - End of Monthly Monthly Monthly Nonthly - Changes - End of Monthly Monthly Monthly Monthly Monthly Monthly Monthly Anothly Monthly End of Monthly Monthly Monthly End of Monthly Monthly Monthly End of Monthly Monthly Monthly End of Monthly Monthly Monthly End of Monthly Monthly End of Monthly Monthly End of Monthly Monthly Monthly	Monthly Changes - End of Changes - End of Changes - End of Changes - End of Changes Monthly Changes - End of Changes - End of Changes Monthly Changes - End of Changes Monthly Changes - End of Changes Monthly Changes Rate Changes - End of Changes Monthly Changes Monthly Changes Call Changes Changes Monthly Changes Call Changes Monthly Changes Call Changes Chan	Monthy Changes - End of Changes Changes Monthy Changes - End of Changes Monthy Changes - End of Changes Monthy Changes - End of Changes Monthy Changes Monthy Changes Monthy Changes Monthy Changes Monthy Changes Monthy Changes Monthy Changes Office 1 Monthy Changes Monthy Changes Monthy Changes Monthy Changes Monthy Changes Monthy Changes 01-Oct Changes Office 1	Monthily Changes - End of - End - End	Monthly Changes - End of - End of	Process Group Prequency: Number: Yar: Started: Oupdated: Team: Started: Complete: Complete:

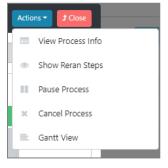
Click on the '+' symbol for process you want to cancel:

Process Progres	ss (Adv	anced	Filters							😂 Ref	iresh	0 0
Applied)												Filters Apply O Re
Search Search	th Clear							Status: All 🝷	Sorted:	Updated * By	47	Team:
Client	Process	Group	Frequency	Period Number ()	Tax Year ()	Started	Updated †	Assigned Team	Status	Percentage Complete :		Client:
	Monthly	Monthly										Mike's Motorbike Shop (PSDMikesMotorbikeShop) ×
Mike's Motorbike Shop	- Changes	- Changes	Monthly	7	2021	01-Oct- 2021	01-Oct- 2021	Office 1	RUNNING	6	_	Processi
(PSDMikesMotorbikeShop)	- End of Month	- End of Month				11:12	11:13					
												Groups
View Steps Process In		Process										
	Monthly	Monthly										Frequency:
Mike's Motorbike Shop	- Changes	- Changes	Monthly	6	2021	27-Sep- 2021	01-Oct- 2021	Office 1	COMPLETED	100	+	
(PSDMikesMotorbikeShop)	- End of Month	- End of Month	montany		2021	14:11	11:12	onice i	comferen			Period Number:
									Showing i	record 1 to 2 of 2	item(s)	Tax Year:
												Started:
												from
												to
												Updated:
												from Mon, Sep 27, 2021 4:23 PM >>
												to

Select View Steps:

quency: Monthly		Pe	riod Number: 7		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			01-Oct-2021 11:12		01-Oct-2021 11:13	COMPLETED	+
Client info received - Ready to process	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
DPS Notifications count check	DPS Check		14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
Download DPS Notifications	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
Download AE Opt Outs	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	÷
Enter data	Manual Task	Mat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	÷
Calculate payroll	Manual Task	Mat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Internal approval	Internal Approval	Pat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Upload review reports to myePayWindow	Manual Task	Mat Ternity	18-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Client approval	Client Approval		18-Oct-2021 08:00		20-Oct-2021 17:00		NOT READY	+
Pay employees - submit payment files	Manual Task	Mat Ternity	20-Oct-2021 08:00		21-Oct-2021 17:00		NOT READY	+
Upload final reports to myePayWindow	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generati notices and feeds	e Manual Task	Mat Ternity	20-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Mat Ternity	20-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Close period	Close Run		25-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Open period	Open Run		25-Oct-2021 08:00		02-Nov-2021 17:00		NOT READY	+

Under Actions select Cancel Process:



The following screen will appear for you to enter a reason:

Cancel Process	
You must enter a reason for cancelling the process (maximum number of characters - 250).	
Cancellation Reason	
	✓ Confirm 1 Back

Once you have entered the reason, click on Confirm.

The next process for the client will be created when the Group period number is updated to the next period number, which is when the automated step Create next process is completed for a client in the group for the current period number.

Please note that when cancelling a process if the current step is automated and has started, this step will complete.

How to start a step or multiple steps of a process early for a client

You can start an individual step, range of step(s) or all steps early for a client process that is due to start in the future.

Select **Process Progress** from the left-menu, use the advanced filters to find the process for the client that you want to start early.

Click on '+' on the row containing the client process, then select the action View Steps:

equency: Monthly		Pe	riod Number: 7		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			01-Oct-2021 11:12	74 - C C C C C C C C	01-Oct-2021 11:12	COMPLETED	+
Client info received - Ready to process	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
DPS Notifications count check	DPS Check		14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	1
Download DPS Notifications	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	1
Download AE Opt Outs	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
Enter data	Manual Task	Mat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Calculate payroll	Manual Task	Mat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Internal approval	Internal Approval	Pat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	ł
Upload review reports to myePayWindow	Manual Task	Mat Ternity	18-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	1
Client approval	Client Approval		18-Oct-2021 08:00		20-Oct-2021 17:00		NOT READY	+
Pay employees - submit payment files	Manual Task	Mat Ternity	20-Oct-2021 08:00		21-Oct-2021 17:00		NOT READY	1
Upload final reports to myePayWindow	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	1
Create Full Payment Submission	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	1
Submit Full Payment Submission	Send FPS		20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	1
Upload payslips and P45s to myePayWindow	Empty Outbox		20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	1
Auto Enrolment - generati notices and feeds	e Manual Task	Mat Ternity	20-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	1
Auto Enrolment - upload feed	Manual Task	Mat Ternity	20-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Close period	Close Run		25-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Open period	Open Run		25-Oct-2021 08:00		02-Nov-2021 17:00		NOT READY	+

Click on the '+' symbol on the step row that you want to start early:

runchy Accounta	nts - Monthly -	Changes - End of	Month (Monthly -	Changes - End	of Month)	C Refresh	Actions •	Clo
equency: Monthly	1	Per	iod Number: 7		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			01-Oct-2021 11:1	12	01-Oct-2021 11:12	COMPLETED	+
Client info received - Ready to process	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	1
🔳 Step Info 🗲 Run Ea	rly 🕼 Edit Step							

Click Run Early:

Run Client info received	- Ready to process Early	
Action:		\$
Run When:	Run Step Early Run Mutliple Steps Early Run All Steps Early	
You must also enter a reason fo	or running this step early (maximum number of characters - 250).	
Run Early Reason		
		Confirm

Complete the following:

• Action

Use the drop down under Action to select from three options:

- **Run Step Early** this just effects the current step
- **Run Multiple Steps Early** will be implemented on the current step and gives you an additional option to select which step up to and including that will be affected

Run Client info received	Ready to process Early	
Action:	Run Mutliple Steps Early	¢
Up to and including:		¢
Run When:	DPS Notifications count check Download DPS Notifications Download AE Opt Outs	
You must also enter a reason fo	Enter data Calculate payroll Internal approval	
Run Early Reason	Upload review reports to myePayWindow Client approval Pay employees - submit payment files Upload final reports to myePayWindow Create full Payment Submission	
_	Upload payslips and P45s to myePayWindow Empty myePayWindow Outbox Auto Enrolment - generate notices and feeds Auto Enrolment - upload feed	
	Close period Open period Create next process	

o Run All Steps Early – all steps will be affected

Run When

Select either Now or Specify Date.

When you select Specify Date you then have an additional prompt to enter the start date and time

Run Client info I	eceived - Ready to process Early
Action:	Run All Steps Early \$
Run When:	🔿 Now 🧿 Specify Date
Select Date Mon, Oct 4, 2021 4	k16 PM ×
You must also enter	a reason for running this step early (maximum number of characters - 250).
Run cany reason	
	Confirm 2 Back

Reason

Enter a reason for running the step(s) early, this is for future reference.

Once you have completed the form, click on **Confirm** for the step start dates to be updated. These steps will then appear as Ready when the new start date is reached and shown under payroll processors work lists.

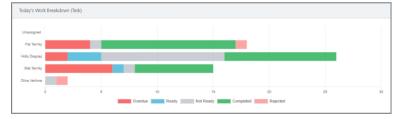
Assigning, reassigning and unassigning manual steps

There are multiple ways to assign and re-assign manual steps on a one-off basis. This is only possible for steps that not yet been completed.

Permanent assignment changes can only be made via editing the Group manual assignment settings.

Via Today's Work Breakdown chart

From vPA Dashboard under Overview, Today's Work Breakdown chart:



Click on the overdue (red) bar in the chart for Mat Ternity, which will take you to the **Step Progress** page showing those overdue steps:

eard	th Search Clear								Status: Overdue	Sorted:	Due - By	1
	Client	Process	Group	Step	Type 3	Scheduled	Started 3	Due	Completed	Assigned User 1	Status	
	Nuggets Nursery (NUGGETSNURSERY.MCP)	Ka Weekly - Changes	Weekly - Changes	Internal approval	Internal Approval	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	
	Cherry Cafe (PSDCherryCafe)	🛤 Weekly - Changes	Weekly - Changes	Enter data	Manual Task	30-Sep-2021 08:00	04-Oct-2021 14:53	01-Oct-2021 17:00		Mat Ternity	OVERDUE	
	Cherry Cafe (PSDCherryCafe)	🛤 Weekly - Changes	Weekly - Changes	Calculate payroll	Manual Task	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	
	Cherry Cafe (PSDCherryCafe)	🛤 Weekly - Changes	Weekly - Changes	Internal approval	Internal Approval	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	
	Cherry Cafe (PSDCherryCafe)	Meekly - Changes	Weekly - Changes	Upload review reports to myePayWindow	Manual Task	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	
	Cherry Cafe (PSDCherryCafe)	Meekly - Changes	Weekly - Changes	Pay employees - submit payment files	Manual Task	01-Oct-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	

Use the tick box to select the steps for reassignment and then click the **Reassign** button at the foot of the screen to choose the reassign user:

Search	Clear
Pat Ternity	4
Holly Daypay	
Mat Ternity	
Olive Vertime	

Once a user has been chosen, click **Select** to confirm.

To un-assign manual steps, for them to have no assignment and become 'Pool' steps, click **Select None** on the Reassign User for selected tasks screen.

Via Weekly Work Breakdown chart

From vPA Dashboard, Weekly Work Breakdown chart:

Week Starting Created Planned Ct Std 4th 5th 6th 7th 8th 9th Users Sun Mon Tue Wed Thu Fri Sat	
Users Sun Mon Tue Wed Thu Fri Sat	
	Total
Unassigned 0 0 0 0 0 0 0 0	0
Pat Ternity 0 1 12 5 8 4 0	30
Holly Daypay 0 14 2 3 2 0 0	21
Mat Ternity 0 2 13 2 6 0 0	23
Olive Vertime 0 1 0 0 3 0 0	4

Click on the number (representing the number of manual steps/tasks assigned) shown in the cell for Monday/Holly Daypay, and the **Step Progress** page will display showing those tasks:

Client	Process	Group	Step	Туре	Scheduled	Started	Due	Completed	Assigned User	Status	
Bits And Bobs (PSDBitsandBobs)	Weekdy - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-5ep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	CONTRACTOR	
Bits And Bobs (PSDBitsandBobs)	Weekdy - Fridays	Weekly - Friday	Auto Enrolment - generate notices and feeds	Manual Task	29-5ep-2021 06:00	01-Oct-2021 11:27	04-Oct- 2021 17:00		Holly Daypay	READY	1
Willows Surgery (PSDWillowsSurgery)	Weekdy - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	Emiliand	
Willows Surgery (PSDWillowsSurgery)	Weekdy - Fridays	Weekly - Friday	Auto Enrolment - generate notices and feeds	Manual Task	29-Sep-2021 08:00	04-Oct-2021 15:24	04-Oct- 2021 17:00		Holly Daypay	(READY)	
Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Upload final reports to portal	Manual Task	30-Sep-2021 06:00		04-Oct- 2021 17:00		Holly Daypay	(CONTINUE)	
Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Empty myePayWindow Outbox	Manual Task	30-Sep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	DUTITAL	
Special Presents (SPECIALPRESENTS.MCP)	Meekly - No Changes	Weekly - No Changes	Create Full Payment Submission	Manual Task	30-Sep-2021 06:00		04-Oct- 2021 17:00		Holly Daypay	(COLUMN)	
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Meekly - No Changes	Weekly - No Changes	Client info received - Ready to process	Manual Task	01-Oct-2021 08:00	04-Oct-2021 14:54	04-Oct- 2021 17:00		Holly Daypay	READY	1
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Download DPS Notifications	Manual Task	01-Oct-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	(NOT READY)	1
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Meekly - No Changes	Weekly - No Changes	Download AE Opt Outs	Manual Task	01-Oct-2021 06:00		04-Oct- 2021 17:00		Holly Daypay	NOT READY	

Use the tick box to select individual steps for reassignment or tick the box in the listing header to select all steps shown on the page (note: completed steps cannot be reassigned). Click the Reassign button at the foot of the screen (note: use the page selector to find the final page footer) to choose the reassign user:

	Client	Process	Group	Step	Туре	Scheduled	Started	Due	Completed	Assigned User	Status	
2	Bits And Bobs (PSDBitsandBobs)	Meekdy - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	CHARACTER	
2	Bits And Bobs (PSDBitsandBobs)	Weekdy - Fridays	Weekly - Friday	Auto Enrolment - generate notices and feeds	Manual Task	29-Sep-2021 08:00	01-Oct-2021 11:27	04-Oct- 2021 17:00		Holly Daypay	(REART)	
	Willows Surgery (PSDWillowsSurgery)	Pa Weekdy - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 06:00		04-Oct- 2021 17:00		Holly Daypay	EnterAnd	
	Willows Surgery (PSDWillowsSurgery)	Weekdy - Fridays	Weekly - Friday	Auto Enrolment - generate notices and feeds	Manual Task	29-Sep-2021 08:00	04-Oct-2021 15:24	04-Oct- 2021 17:00		Holly Daypay	READY	
	Special Presents (SPECIALPRESENTS.MCP)	P Weekly - No Changes	Weekly - No Changes	Upload final reports to portal	Manual Task	30-Sep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	0000000	
	Special Presents (SPECIALPRESENTS.MCP)	Weekly · No Changes	Weekly - No Changes	Empty myePayWindow Outbox	Manual Task	30-Sep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	(Internet)	
	Special Presents (SPECIALPRESENTS.MCP)	Meekly - No Changes	Weekly - No Changes	Create Full Payment Submission	Manual Task	30-Sep-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	(COMMANNA)	
	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Meekly - No Changes	Weekly - No Changes	Client info received - Ready to process	Manual Task	01-Oct-2021 08:00	04-Oct-2021 14:54	04-Oct- 2021 17:00		Holly Daypay	READY	
	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Reekly - No Changes	Weekly - No Changes	Download DPS Notifications	Manual Task	01-Oct-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	(UNITED ADV)	
	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Keekly - No Changes	Weekly - No Changes	Download AE Opt Outs	Manual Task	01-Oct-2021 08:00		04-Oct- 2021 17:00		Holly Daypay	NOT STADY	

Search	Clear
Pat Ternity	ه
Holly Daypay	
Mat Ternity	
Olive Vertime	
	-

Once a user has been chosen, click **Select** to confirm.

To un-assign manual steps, for them to have no assignment and become 'Pool' steps, click **Select None** on the Reassign User for selected tasks screen.

Via Step Progress (left-menu)

As we have seen already steps can be reassigned from the Dashboard and drill-down to the Step you can see that from the Dashboard you can reassign via **Step Progress** page.

You can also go directly from the left-menu to Step Progress page but when you are not coming via a dashboard chart/widget you need to set the filters to find the steps you want to reassign.

From **Step Progress**, click the burger icon in the top right-hand corner for the advanced filter options. A default filter is applied for the logged in user for Manual tasks that are due today.

Use the advanced filters to find tasks for a specific client, user, group, process etc.

Filters	🗸 Apply	Reset
Team:		
		~
Olive Vertime X		~
		_
Client:		
		~
Processi		
		~
Group:		
		~
Step:		
		~
Type:		
		~
Exclude Reran Steps:		
Exclude N/A Steps:		
Exclude Cancelled Processes:		
Scheduled:		
from		
to		
Started:		
Only show records Started:		
Only show records not Started:		
from		
to		
Dues		
from		×
Mon, Oct 4, 2021 12:00 AM		

Via Process Progress (left-menu)

Select **Process Progress** from the left-menu:

rocess Progress (Advance	ed Filters Ap	plied)								C R	efrest
earch Search Clear								Status:	All • So	ted: Updated *	by:
Client :	Process	Group	Frequency :	Period Number :	Tax Year :	Started :	Updated	Assigned Team :	Status :	Percentage Complete	
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 15:41	Office 1	RUNNING	8	•
Spick And Span Cleaners SPICKANDSPANCLEANERS.MCPJ	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct-2021 11:26	04-Oct-2021 15:20	Office 1	RUNNING	78	•
Home Improvements (HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep-2021 17:28	04-Oct-2021 15:14	Office 1	FAILED	43	•
Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:49	04-Oct-2021 14:53	Office 1	RUNNING	22	•
Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	RUNNING	24	•
Nuggets Nursery (NUGGETSNURSERV.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	RUNNING	24	•
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100	•
Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:26	04-Oct-2021 14:49	Office 1	COMPLETED	100	•
Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep-2021 17:25	04-Oct-2021 14:48	Office 1	COMPLETED	100	•
Nuggets Nursery (NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep-2021 17:25	04-Oct-2021 14:48	Office 1	COMPLETED	100	•

arch Search Clear	ed Fliters Ap	pilea)						Statu	s Al • Se	ned: Updated *	By: 1
lient	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	: Status :	Percentage Complete	
elping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 15:41	Office 1	(2022023)	e	
pick And Span Cleaners SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct-2021 11:26	04-Oct-2021 15:20	Office 1	(CONTRACTOR)	71	
Iome Improvements HOMEIMPROVEMENTS.MCP)	Weekdy - Changes	Weekly - Changes	Weekdy	27	2021	27-Sep-2021 17:28	04-Oct-2021 15:14	Office 1	FALLED	41	
Villiams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Weekty	27	2021	04-Oct-2021 14:49	04-Oct-2021 14:53	Office 1	RUNNING	24	•
View Steps Process Info herry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Weekty	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	Electron	8	
uggets Nursery (NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	(CONNING)	24	
lelping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekdy	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100	1
villiams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:26	04-Oct-2021 14:49	Office 1	COMPLETED	100	
herry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep-2021 17:25	04-Oct-2021 14:48	Office 1	COMPLETED	100	•
	Weekly - Changes	Weekly -	Weekdy	26	2021	27-Sep-2021 17:25	04-Oct-2021 14:48	Office 1	(COMPLETE)	100 /	

Click on the '+' symbol for the Client process/steps where you want to reassign:

Click the View Steps action to display all the steps for this client's process:

equency: Weekly		Pe	riod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:49		04-Oct-2021 14:49	COMPLETED	J
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:49	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	Ľ
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:53	COMPLETED	
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:53	05-Oct-2021 17:00		READY	
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	
Auto Enrolment - generate notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	

Click '+' symbol for the step that you want to reassign:

						COMPLETED	+
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:53	05-Oct-2021 17:00	READY	-
✓ Sign Off 🔲 Step Info	B Bdit Step						
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00	NOT READY	+
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00	NOT READY	+
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00	NOT READY	+

Click Edit Step action:

Edit Enter data?		Save Cancel
Are you sure you want to edit	Enter data?	
Manual Assignment:	Pat Ternity	Select User Clear

Click Select User:

lect User		
Search		Clear
Pat Ternity		*
Holly Daypay		
Olive Vertime		
		v
	🗸 Sele	ct 1 Cancel

Once a user has been chosen, click **Select** to confirm.

To un-assign manual steps and for them to have no assignment and become 'Pool' steps, click Clear on the Edit step form.

How to search for a specific client

The following left-menu options offer an advanced filter that enables you to search for specific information, including clients:

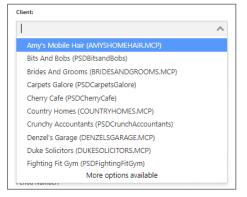
- Process Progress
- Step Progress
- Planned Processes
- Planned Steps

The advanced filters are accessed via the burger icon in the top right-hand corner of the page.

See example below using Process Progress:

Process Progress (Advand	ced Filt	ers							2 Refresh	· · · · · · · · · · · · · · · · · · ·
Applied)											Filters Apply
iearch Search Or	ear						Status	All -	Sorted: Updat	ed ∗ By: I₹	Team:
Client	Process	Group	Frequency	Period Number :	Tax Year :	Started	Updated 7	Assigned Team	Status	Percentage Complete	Client:
Helping Hands	Weekly -	Weekly -				04-Oct-	04-Oct-				
(PSDHelpingHands)	Paid Thursdays	Thursday	Weekly	27	2021	2021 14:50	2021 15:41	Office 1	EUNNING	•	Process
						01-Oct-	04-Oct-				
Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	2021	2021	Office 2	RUNNING	76	Group
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct- 2021	04-Oct- 2021	Office 1	EUNNING	76	Frequencys
	-	-				11:26	15:20				
Home Improvements (HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep- 2021	04-Oct- 2021	Office 1	FAILED	48	Period Number:
(ROMEINPROVEMENTS.MCP)	Unanges	Changes				17:28	15:14				
Special Presents	Weekly - No	Weekly - No	Weekly	26	2021	04-Oct- 2021	04-Oct- 2021	Office 2	FAILED		Tax Years
(SPECIALPRESENTS.MCP)	Changes	Changes				14:51	15:01		-	_	
Treasure Nursing Home	Weekly -	Weekdy - No	Weekly	27	2021	04-Oct- 2021	04-Oct- 2021	Office 2	EUNNING		Started:
(TREASURENURSINGHOME.MCP)	Changes	Changes	weeky	21	2021	14:53	14:54	Onice 2	E. MARINE		from
Treasure Nursing Home	Weekly -	Weekly -				01-Oct-	04-Oct-				to
(TREASURENURSINGHOME.MCP)	No Changes	No Changes	Weekly	26	2021	2021 11:04	2021 14:53	Office 2	COMPLETED	100	Updatedi
											opeaneer

After clicking on the burger icon, in the advanced filter, click the drop-down selector for Client:



Only the first ten clients (alphabetically) are displayed in the list, if the client you are looking for is not shown:



Start typing the client name in the box and matches will appear for you to select the client:



Click Apply at the top of the Filters screen, to filter Process Progress for this client.

How to edit steps in a current process

All Steps – Mark as Not Applicable

You are only able to mark a step as **Not applicable** if the step has not started.

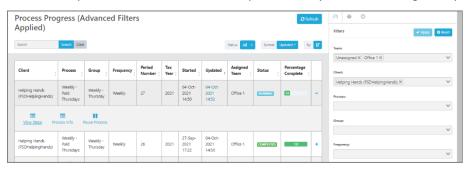
The following automated steps cannot be marked as Not applicable:

- Initialise Process
- Create Next Process

To edit the step, go to the left-menu **Process Progress**, use the Advanced Filters to find the client:

pplied)												Filters Apply O
iearch	Search Clear							Status: All	Sorted:	Updated * By	17	Teami
												Unassigned X Office 1 X
Client	Process	Group	Frequency	Period Number :	Tax Year :	Started :	Updated 1	Assigned Team	Status	Percentage Complete		Clients
Helping Hands (PSDHelpingHands)	Weekly - Paid	Weekly - Thursday	Weekly	27	2021	04-Oct- 2021	04-Oct- 2021	Office 1	RUNNING	24		Helping Hands (PSDHelpingHands) X
(see requiring month	Thursdays					14:50	14:53					
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	•	Groupe
Helping Hands	Weekly -	Weekly -				27-Sep-	27-Sep-					

Click the '+' symbol on the row for the client process that you want to change a step to Not applicable:



Click on View Steps:

quency: Weekly		Pe	riod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	+
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	+
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY	+
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generate notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+

Click the '+' symbol on the row for the step you want to mark as Not applicable:

elping Hands - V	veekiy - Paid Th	ursdays (weekly	- Thursday)			C Refresh	Actions •	t Ck		
equency: Weekly		Pe	riod Number: 27		Tax Year:	2021				
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status			
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	4		
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+		
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+		
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	1		
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY	+		
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	1		
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	4		

Click on Edit Step:

Edit Enter data?		✓ Save	1 Cancel
Are you sure you want to edit	Enter data?		
Scheduled Date:	04-Oct-2021 08:00		
Manual Assignment:	Pat Ternity	Select User	Clear
Not Applicable:	0		

Tick the **Not Applicable** box, then click on **Save**.

Internal approvals

If the step has not started you can change the **Schedule Date**, **Assigned Approver** and set as **Not applicable**, if the step has started then you can only change the **Assigned Approver**.

To edit the step, go to the left-menu Process Progress, use the Advanced Filters to find the client:



Click the '+' symbol on the row for the client process that you want to edit the Internal Approval step:

Process Prog Applied)	gress (A	dvance	ed Filter	s						2 Ref	resh	 (?) ⊕ ③ Filters ♥ Apply ◎ lease
Search	Search Clear							Status: All •	Sorted:	Jpdated *	١Ţ	Теоли
Client :	Process :	Group :	Frequency :	Period Number :	Tax Year :	Started :	Updated ,	Assigned Team :	Status :	Percentage Complete		Unassigned X Office 1 X
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct- 2021 14:50	04-Oct- 2021 14:53	Office 1	RUNINING	8	-	[Helping Hands (PSDHelpingHands) %] *
Uiew Steps Pro	cess Info F	Pause Process										Group
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	+	Frequency:

Click on View Steps:

quency: Weekly		Pe	riod Number: 27		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Auto Enrolment - generate notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY

Click the '+' symbol on the row for the Internal Approval step:

Calculate payroll Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00	NOT READY
Internal approval Internal Approval	Mat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00	NOT READY
Edit Step				
Upload review reports to Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00	NOT READY

Click on Edit Step:

Edit Internal appro	oval?	✓ Save	1 Cancel
Are you sure you want to ee	iit Internal approval?		
Scheduled Date:	04-Oct-2021 08:00		
Assigned Approver:	Mat Ternity	Select User	Clear
Not Applicable:	0		

Make the changes you require, then click on **Save**.

Client approvals

If the step has not started you can change the **Schedule Date**, **Action When Overdue**, **Assigned Approvers** and set as **Not applicable**, if the step has started then you cannot edit the step.

To edit the step, go to the left-menu **Process Progress**, use the Advanced Filters to find the client:

												Filters Apply O Re
earch	Search Clear							Status: All	Sorted:	Updated * By	17	Team:
												Unassigned X Office 1 X
Client	Process	Group	Frequency	Period Number :	Tax Year ∶	Started :	Updated 1	Assigned Team	Status	Percentage Complete		Client:
Helping Hands PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct- 2021 14:50	04-Oct- 2021 14:53	Office 1	RUNNING	24	•	(Helping Hands (PSDHelpingHands) ×) Precesse
Helping Hands PSDHelpingHands)	Weekly - Paid Thursdays	Weekdy - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	•	Groups
Helping Hands PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep- 2021 16:22	27-Sep- 2021 17:22	Office 1	COMPLETED	100	•	Frequency:

Click the '+' symbol on the row for the client process that you want to edit the Client Approval step:

	rocess Prog pplied)	gress (A	dvance	ed Filter	s						C Ref	resh	(?) (*)
	ppnea)												Filters Apply O Reset
S	sarch	Search Clean							Status: All -	Sorted:	Jpdated • By	47	Теалы
													Unassigned X Office 1 X
1	lient 3	Process	Group	Frequency :	Period Number :	Tax Year :	Started	Updated _†	Assigned Team	Status :	Percentage Complete		Clients
		Weekly -					04-Oct-	04-Oct-					Helping Hands (PSDHelpingHands) ×
	elping Hands PSDHelpingHands)	Paid Thursdays	Weekly - Thursday	Weekly	27	2021	2021 14:50	2021 14:53	Office 1	RUNNING	8	-	Process
													×
	View Steps Pro	tess Info P	ause Process										Group
	Helping Hands PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	+	Frequency:

Click on View Steps:

quency: Weekly		Pe	riod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	+
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	+
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY	+
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generati notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+

Click the '+' symbol on the row for the Client Approval step:

myePayWindow				
Client approval Client Approval		04-Oct-2021 08:00	05-Oct-2021 17:00	NOT READY
🖾 Step Info				
Pay employees - submit Manual Task payment files	Pat Ternity	05-Oct-2021 08:00	05-Oct-2021 17:00	NOT READY

Click on Edit Step:

Edit Client approv	Edit Client approval?								
Are you sure you want to ea	dit Client approval?								
Scheduled Date:	Select Date Mon, Oct 4, 2021 8:00 AM	×							
Action When Overdue:	Complete Step	\$							
Assigned Approvers:	1 Selected	View/Select Er Users							
Not Applicable:	0								

Make the changes you require, then click on Save.

Manual steps

If the step has not started you can change the **Schedule Date**, **Manual Assignment** and set as **Not applicable**, if the step has started then you can only change the **Manual Assignment**.

To edit the step, go to the left-menu **Process Progress**, use the Advanced Filters to find the client:

Process Proc	gress (A	dvance	d Filters							C Re	fresh	0 0
Applied)												Filters Apply O Rese
Search	Search Clear							Status: All	Sorted:	Updated * By	: I7	Teami
												Unassigned X Office 1 X
Client	Process	Group	Frequency	Period Number :	Tax Year :	Started :	Updated 1	Assigned Team	Status :	Percentage Complete		Clients
	Weekly -					04-Oct-	04-Oct-					Helping Hands (PSDHelpingHands) ×
Helping Hands (PSDHelpingHands)	Paid Thursdays	Weekly - Thursday	Weekly	27	2021	2021 14:50	2021 14:53	Office 1	RUNNING	24	•	Processi
						27-Sep-	04-Oct-					· · · · · · · · · · · · · · · · · · ·
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	2021 14:50	Office 1	COMPLETED	100	+	Group
												· · · · · · · · · · · · · · · · · · ·
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep- 2021 16:22	27-Sep- 2021 17:22	Office 1	COMPLETED	100	+	Frequency:
	mursuays					10:22	17:22					· · · · · · · · · · · · · · · · · · ·

Click the '+' symbol on the row for the client process that you want to edit the Manual step:

Process Pro Applied)	gress (A	dvance	ed Filter	s						C Ref	iresh	 ○ ⊕ ○ Filters ✓ Apply: O Reset
Search	Search Clean							Status: All -	Sorted:	Jpdated •	١ ٢	Теалы
Client :	Process :	Group :	Frequency :	Period Number :	Tax Year :	Started :	Updated ,	Assigned Team :	Status :	Percentage Complete		Unassigned X Office 1 X V
Helping Hands (PSDHelpingHands)	Weekly - Paicl Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct- 2021 14:50	04-Oct- 2021 14:53	Office 1	RUNNING	8	-	Helping Hands (PSDHelpingHands) X
View Steps Pro	Cess Info F	Pause Process										Group:
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursd a ys	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	+	Frequency:

Click on View Steps:

quency: Weekly		Pe	riod Number: 27		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:51	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Auto Enrolment - generati notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY

Click the '+' symbol on the row for the Manual step:

Download AE Opt Out	s Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00	READY	1
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00	NOT READY	
📼 Step Info 🕼 Edit	t Step						
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00	NOT READY	•

Click on Edit Step:

Edit Enter data?									
Are you sure you want to ed	it Enter data?								
Scheduled Date:	04-Oct-2021 08:00								
Manual Assignment:	Pat Ternity	Select User	Clear						
Not Applicable:	0								

Make the changes you require, then click on Save.

Empty Outbox – Publish Date(s)

If the step has not started you can change the **Schedule Date**, **Publish Date** and set as **Not applicable**, if the step has started then you cannot edit the step.

To edit the step, go to the left-menu **Process Progress**, use the Advanced Filters to find the client:

Process Pro	gress (A	dvance	d Filters	5						ØR	efresh	0. 0
Applied)												Filters 🗸 Apply 🖸 Res
Search	Search Clear							Status: All	- Sorted:	Updated *	y: 47	Team
												Unassigned X Office 1 X
Client	Process	Group	Frequency	Period Number :	Tax Year (Started	Updated 1	Assigned Team	Status	Percentage Complete		Clients
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct- 2021 14:50	04-Oct- 2021 14:53	Office 1	RUNNING	24	•	Helping Hands (PSDHelpingHands) ×
Helping Hands (PSDHelpingHands)	Weekly - Paicl Thursdays	Weekly - Thursday	Weekdy	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	+	Groups
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep- 2021 16:22	27-Sep- 2021 17:22	Office 1	COMPLETED	100	•	Frequencys
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	24	2021	27-Sep- 2021 15:03	27-Sep- 2021 16:22	Office 1	COMPLETED	100	+	Period Number:
Helping Hands (PSDHelpingHands)	Weekly - Paicl Thursdays	Weekly - Thursday	Weekly	23	2021	27-Sep- 2021 14:12	27-Sep- 2021 15:03	Office 1	COMPLETED	100	•	Tax Year:
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	22	2021	27-Aug- 2021 10:41	27-Sep- 2021 14:12	Office 1	COMPLETED	100	•	Started: from
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	21	2021	27-Aug- 2021 10:02	27-Aug- 2021 10:41	Office 1	COMPLETED	100	+	to
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2021	24-Aug- 2021 16:41	27-Aug- 2021 10:02	Office 1	COMPLETED	100	+	Updated: from to
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	19	2021	12-Aug- 2021 10:13	24-Aug- 2021 16:41	Office 1	COMPLETED	100	•	10
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekdy	18	2021	30-Jul- 2021 16:16	12-Aug- 2021 10:13	Office 1	COMPLETED	100	•	
										ord 1 to 10 of 11		

Click the '+' symbol on the row for the client process that you want to edit the Empty Outbox step:

Process Prog Applied)	gress (A	dvance	ed Filter	S						C Ret	fres
Search	Search Clear							Status: All 👻	Sorted:	Updated - By	n
Client	Process	Group	Frequency	Period Number 🔅	Tax Year ∶	Started	Updated	Assigned Team 🗘	Status	Percentage Complete 🛊	Γ
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct- 2021 14:50	04-Oct- 2021 14:53	Office 1	RUNNING	24	
Uiew Steps Pro	cess Info F	Pause Process									
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep- 2021 17:22	04-Oct- 2021 14:50	Office 1	COMPLETED	100	

Click on View Steps:

equency: Weekly		р	eriod Number: 27		Tax Year:	2021		
					-			
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:50		04-Oct-2021 14:51	COMPLETED	+
Client info received - Ready to process							COMPLETED	+
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	COMPLETED	+
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:52	N/A	+
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:52	05-Oct-2021 17:00	04-Oct-2021 14:53	COMPLETED	+
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:53	05-Oct-2021 17:00		READY	+
Calculate payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Client approval	Client Approval		04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Upload final reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generat notices and feeds	e Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Pat Ternity	05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Close period	Close Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+
Open period	Open Run		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY	+

Click the '+' symbol on the row for the Empty Outbox step:

to myePayWindow				
Empty myePayWindow Manual Task Outbox	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00	NOT READY
📼 Step Info				
Auto Enrolment - generate Manual Task	Pat Ternity	05-Oct-2021 08:00	08-Oct-2021 17:00	NOT READY

Click on Edit Step:

Edit Upload pay	Edit Upload payslips and P45s to myePayWindow?									
Are you sure you want to	o edit Upload payslips and P45s to myePayWindow?									
Scheduled Date:	23-Nov-2021 08:00									
Payslips	Publish Date Thu, Nov 25, 2021									
Not Applicable:	•									

Make the changes you require, then click on Save.

Please Note: if you upload both Payslips and CIS Statements in the same Empty outbox step, the CIS Statements publish date is applied to Payslips.

Create report

If the Create report step has not started you can change the **Schedule Date, Export File Name Override** and set as **Not applicable**, if the step has started then you cannot edit the step.

To edit the step, go to the left-menu **Process Progress**, find the client then click the '+' symbol on the row for the client process that you want to edit the Create report step:

, IRIS ≡	The PayrollPro Bureau										O Pat Ternity	• =
⑦ vPA Dashboard	Process Progress (Advan	ced Filters Applie	d)								Ø R	lefresh
virtual Payroll Assistant	Search Clear								Status	All 👻 S	iorted: Updated -	8y: 17
Groups Groups												
Teams Clients	Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated †	Assigned Team	Status	Percentage Complete	
Month View	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	FAILED	62	+
Process Progress	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekiy	20	2022	12-Aug-2022 08:30	19-Aug-2022 08:31	Directors	СОМРЫТТО	100	•
 Planned Processes 	Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	RUNNING	28	+
 Planned Steps Logs 	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	RUNNING	48	+
virtual Payroll Admin	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	5	2022	16-Aug-2022 17:01	18-Aug-2022 16:06	Office 1	RUNNING	52	+
 Admin Settings Log out 	Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekiy	21	2022	18-Aug-2022 08:30	18-Aug-2022 08:31	Directors	RUNNING	12	-
	View Steps Process Info Pause Proc	ess										
	Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	11-Aug-2022 08:30	18-Aug-2022 08:30	Directors	COMPLETED	100	+

Click on View Steps:

quency: Weekly			Period Number: 21		Tax Year:	2022		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			18-Aug-2022 08:30		18-Aug-2022 08:31	COMPLETED	
Calculate	Calculate		23-Aug-2022 08:00		24-Aug-2022 17:00		NOT READY	
Create Full Payment Submission	Create FPS		24-Aug-2022 08:00		26-Aug-2022 17:00		NOT READY	1
Submit Full Payment Submission	Send FPS		24-Aug-2022 08:00		26-Aug-2022 17:00		NOT READY	1
Create Report and Add To Outbox	Create Report		24-Aug-2022 08:00		26-Aug-2022 17:00		NOT READY	1
Close period	Close Run		30-Aug-2022 08:00		02-Sep-2022 17:00		NOT READY	1
Open period	Open Run		30-Aug-2022 08:00		02-Sep-2022 17:00		NOT READY	

Click the '+' symbol on the row for the Create report step:

Create Report and Add To Create Report	24-Aug-2022 08:00	26-Aug-2022 17:00	NOT READY
Outbox			
The step info			
Close period Close Run	30 Aug 2022 08:00	02 Sep 2022 17:00	NOT READY +

Click on Edit Step:

Edit Create Repo	rt and Add To C	Outbox?	✓ Sav	e 🕈 Cancel
Are you sure you want to	edit Create Report and	Add To Outbox?		
Scheduled Date:	17-Aug-2022 08	3:00		
Report Name	Export Type	File Name Override	Add To Outbox	
PAPEN1/PSPEN1	PDF			Edit
PARUN6/PSRUN6	PDF			Edit
PARUNT3/PSRUNT3	PDF			Edit
PARUNT5/PSRUNT5	PDF			Edit
Not Applicable:	0			

Click on the Edit button against a report to change the Export File Name Override, once you have made all the changes required click on Save.

How to view future work

There are two types of processes:

- **Created** these are process that have been created, where they are either completed, running, paused, cancelled, or failed.
- **Planned** these are processes that have not been created yet, which are normally due in the future, for processes where the schedule is Design, Ready and Active.

Planned processes are automatically generated every Sunday at midnight, to provide a preview of the next six months future work.

If you have made several changes to the Group set up, it is possible to force an update of the planned processes to reflect these changes, go to the left menu either **Planned Processes** or **Planned Steps**:

Γ	Planned Processes (Advance	d Filters App	olied)				Last Upda	ted: 03-0	rt-2021 00:00	Update 2	Refresh
	Search Search Clear								Sorted: First Ste	ep Start Date *	By: 👢
	Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency ₃	Period Number 🗘	Tax Year ≎	Assigned Team î	Schedule Status	1

You will see Last Updated, which will show the last time the planned processes and steps where updated. Click on the Update button:

Planned Processes (Advance	d Filters App	olied)				Last Upda	ted: Curre	ntly Updating	Update	2 Refresh
Search Search Clear								Sorted: First St	ep Start Date *	By:
Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency 3	Period Number 🗊	Tax Year ≎	Assigned Team	Schedule Status	¢

You will see the description has changed to Currently Updating, when it has completed it will show the date and time.

Please note that updating the Planned processes and steps may take a while but does not impact on any processing.

You can see the planned details via the left menus Planned Processes and Planned Steps.

The planned processes are also included in the **vPA Dashboard** views, all these charts you can drill down to see a list view to see future weeks and months:

My Work – My Work Calendar



Overview – Weekly Work Breakdown

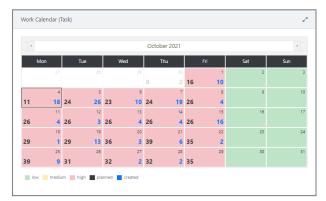
Select Created Steps:

		Week Starting						
		n, 3rd Oct 2021			C	Created	Planned	
Oct	3rd	4th	5th	6th	7th	8th	9th	
Users	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
Unassigned	0	0	0	0	0	0	0	0
Pat Ternity	0	1	11	5	8	4	0	29
Holly Daypay	0	14	2	3	2	0	0	21
Mat Ternity	0	2	13	2	6	0	0	23
Olive Vertime	0	1	0	0	3	0	0	4

Select Planned Steps:

		Week Starting						
	« S	un, 3rd Oct 2021			C	Created 🧿	Planned	
Oct	3rd	4th	5th	6th	7th	8th	9th	
Users	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
Unassigned	0	0	0	0	0	0	0	0
Pat Ternity	0	0	17	2	6	11	0	36
Holly Daypay	0	10	2	17	9	6	0	44
Mat Ternity	0	0	5	2	8	9	0	24

Overview – Work Calendar



Client Approvals – Approval Calendar

•						00	tober 2021				2
	Mon		Tue		Wed		Thu		Fri	Sat	Sun
	27		28		29		30		1	2	3
						1	1	2	2		
	4		5		6		7		8	9	10
1	1	2	2	2		2		2			
	11		12		13		14		15	16	17
2		2	1	2		2		2	1		
	18		19		20		21		22	23	24
2	1	2		2	3	3		3			
	25		26		27		28		29	30	31
4		5		2		2		2			

Alternative view of a client's process (Gantt chart)

In the left menu select Process Progress:

arch Search Clear								Status:	Sorte	d: Updated * B	ly: I
lient	Process	Group	Frequency :	Period Number :	Tax Year :	Started	Updated †	Assigned Team :	Status	Percentage Complete	
its And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	27-Sep-2021 17:21	01-Oct-2021 11:27	Office 2	RUNNING	76	+
pick And Span Cleaners SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	25	2021	27-Sep-2021 17:23	01-Oct-2021 11:26	Office 1	COMPLETED	100	•
Irides And Grooms BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	7	2021	01-Oct-2021 11:14	01-Oct-2021 11:14	Office 1	RUNNING	8	+
rides And Grooms BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	6	2021	01-Sep-2021 11:55	01-Oct-2021 11:14	Office 1	COMPLETED	100	+
/like's Motorbike Shop PSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	7	2021	01-Oct-2021 11:12	01-Oct-2021 11:13	Office 1	RUNNING	8	+
Crunchy Accountants (PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	7	2021	01-Oct-2021 11:12	01-Oct-2021 11:12	Office 1	RUNNING	1	•
tike's Motorbike Shop PSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	6	2021	27-Sep-2021 14:11	01-Oct-2021 11:12	Office 1	COMPLETED	100	+
runchy Accountants (PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	6	2021	27-Sep-2021 14:13	01-Oct-2021 11:12	Office 1	COMPLETED	100	+
reasure Nursing Home REASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	25	2021	27-Sep-2021 16:28	01-Oct-2021 11:04	Office 2	COMPLETED	100	+
iarry The Gardener HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	28	2021	01-Oct-2021 08:30	01-Oct-2021 08:31	Directors	RUNNING	14	+

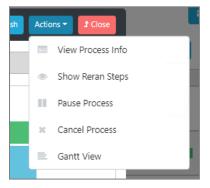
rocess Progress (Advancess)	ced Filters Ap	plied)						Status:	All - Sort	-	efrest br []
llient	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
its And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	27-Sep-2021 17:21	01-Oct-2021 11:27	Office 2	CUMMUS	76	
pick And Span Cleaners SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	25	2021	27-Sep-2021 17:23	01-Oct-2021 11:26	Office 1	COMPLETED	100	
rides And Grooms SRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	.7	2021	01-Oct-2021 11:14	01-Oct-2021 11:14	Office 1	(CONNING)	1	
rides And Grooms BRIDESANDGROOMS.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	6	2021	01-Sep-2021 11:55	01-Oct-2021 11:14	Office 1	COMPLETED	100	
like's Motorbike Shop SSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	7	2021	01-Oct-2021 11:12	01-Oct-2021 11:13	Office 1		8	1
View Steps Process Info	ss										
runchy Accountants (PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	7	2021	01-Oct-2021 11:12	01-Oct-2021 11:12	Office 1		t	
fike's Motorbike Shop PSDMikesMotorbikeShop)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	6	2021	27-Sep-2021 14:11	01-Oct-2021 11:12	Office 1	COMPLETED	100	
runchy Accountants (PSDCrunchAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	Monthly	6	2021	27-Sep-2021 14:13	01-Oct-2021 11:12	Office 1	COMPLETED	100	
reasure Nursing Home IREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	25	2021	27-Sep-2021 16:28	01-Oct-2021 11:04	Office 2	COMPLETED	100	
larry The Gardener HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	28	2021	01-Oct-2021 06:30	01-Oct-2021 08:31	Directors	(SURNING)		

Click on the '+' symbol for the Client process/steps where you want to view the Gantt chart:

Click on the action View Steps:

quency: Monthly		Pe	riod Number: 7		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			01-Oct-2021 11:12		01-Oct-2021 11:13	COMPLETED	+
Client info received - Ready to process	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
DPS Notifications count check	DPS Check		14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
Download DPS Notifications	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
Download AE Opt Outs	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY	+
Enter data	Manual Task	Mat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Calculate payroll	Manual Task	Mat Ternity	15-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Internal approval	Internal Approval	Pat Ternity	15-Oct-2021 08:00		19+Oct-2021 17:00		NOT READY	+
Upload review reports to myePayWindow	Manual Task	Mat Ternity	18-Oct-2021 08:00		19-Oct-2021 17:00		NOT READY	+
Client approval	Client Approval		18-Oct-2021 08:00		20-Oct-2021 17:00		NOT READY	+
Pay employees - submit payment files	Manual Task	Mat Ternity	20-Oct-2021 08:00		21-Oct-2021 17:00		NOT READY	+
Upload final reports to myePayWindow	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Mat Ternity	20-Oct-2021 08:00		25-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generati notices and feeds	e Manual Task	Mat Ternity	20-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Mat Ternity	20-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Close period	Close Run		25-Oct-2021 08:00		01-Nov-2021 17:00		NOT READY	+
Open period	Open Run		25-Oct-2021 08:00		02-Nov-2021 17:00		NOT READY	+

Under the Actions drop down menu select Gantt View:



The following Gantt chart will appear showing how the steps have been scheduled for the Clients process:

2. DPS Notifications count sheak Image: Solution of PB Notifications Image: Solution of PB Notification of PB Notifications Image: Sol	Client info received - Ready to proc									
A Download AE Qrt OutsImage: Solution of the solutio	2. DPS Notifications count check									
S. Enter data Image: Section of the sectin of the section of the section of the section of the	3. Download DPS Notifications									
A Calculate payrolA Ca	4. Download AE Opt Outs									
A meanA me	5. Enter data									
Joad review reports to myePay/ML. Image: Solution of the sproval Im	6. Calculate payroll									
A. Client approval Image: Client app	7. Internal approval									
Pay employees - submit payment L. Image: submit payment payment payment L. Image: submit payment	Upload review reports to myePayWi									
Upload final reports to mye ^R eyWin Image: Second sec	9. Client approval									
12. Create Full Payment Submission Image: Submission <	. Pay employees - submit payment f									
3. Submit Full Payment Submission Image: Submit Full Payment Submit Full Payment Full Paym	. Upload final reports to myePayWin									
4. Upload paysips and PASs to mye Image: Solution of the solu	12. Create Full Payment Submission									
15. Empty myePayWindow Outbook Image: Solution of the solution o	13. Submit Full Payment Submission									
Auto Enrolment - generate notices Image: Constraint - generate notices Image: Constraint - generate notices 17. Auto Enrolment - generate notices Image: Constraint - generate notices Image: Constraint - generate notices 18. Close period Image: Constraint - generate notices Image: Constraint - generate notices 18. Close period Image: Constraint - generate notices Image: Constraint - generate notices 19. Open period Image: Constraint - generate notices Image: Constraint - generate notices 20. Create next process Image: Constraint - generate notices Image: Constraint - generate notices	4. Upload payslips and P45s to mye									
17. Auto Enrolment - upload feed Image: Company of the company of	15. Empty myePayWindow Outbox									
18. Close period 19. Open period 20. Create next process	3. Auto Enrolment - generate notices									
19. Open period 19. Open p	17. Auto Enrolment - upload feed									
20. Create next process	18. Close period									
	19. Open period									
16/10 18/10 20/10 22/10 24/10 26/10 28/10 30/10 01/11	20. Create next process									
		16/10	18/10	20/10	22/10	24/10	26/10	28/10	30/10	01/11

Refresh vPA website

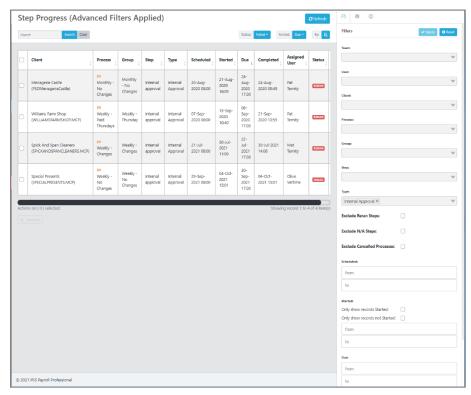
You can use F5 on your keyboard to refresh the vPA website, you will remain in the page currently selected.

To refresh the information displayed on one of the pages, use the **Refresh** button.

The vPA Dashboard page will automatically refresh every 30 seconds, or sooner if a task is signed off or the filters are changed.

How to change the Action Required by user for a rejected Internal approval

To edit the step, go to the left-menu **Step Progress**, under Status select **Failed** and use the Advanced Filters to find the Internal Approval step:



Click the '+' symbol on the row for the client process that you want to edit the Internal Approval step:

Client	Process	Group	Step	Type :	Scheduled	Started	Due	Completed	Assigned User :	Status :	
Menagerie Castle (PSDMenagerieCastle)	Monthly - No Changes	Monthly - No Changes	Internal approval	Internal Approval	20-Aug-2020 08:00	21-Aug-2020 16:09	24-Aug-2020 17:00	24+Aug+2020 09:49	Pat Ternity	RERAN	
Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	🛤 Weekly - Paid Thursdays	Weekly - Thursday	Internal approval	Internal Approval	07-Sep-2020 08:00	15-Sep-2020 10:40	08-Sep-2020 17:00	21-Sep-2020 13:55	Pat Ternity	RERAN	
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP))© Weekly - Changes	Weekly - Changes	Internal approval	Internal Approval	21-Jul-2021 08:00	30-Jul-2021 11:09	22-Jul-2021 17:00	30-Jul-2021 14:06	Mat Ternity	RERAN	
Special Presents (SPECIALPRESENTS.MCP)	Neekly - No Changes	Weekly - No Changes	Internal approval	Internal Approval	29-Sep-2021 08:00	04-Oct-2021	30-Sep-2021	04-Oct-2021	Olive Vertime	FAILED	

Click on View Process:

quency: Weekly		Peri	od Number: 26		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			04-Oct-2021 14:51		04-Oct-2021 14:53	COMPLETED	+
Client info received - Ready to process							COMPLETED	+
DPS Notifications count check	DPS Check		29-Sep-2021 08:00	04-Oct-2021 14:54	30-Sep-2021 17:00	04-Oct-2021 14:54	COMPLETED	+
Download DPS Notifications	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 14:54	30-Sep-2021 17:00	04-Oct-2021 14:54	N/A	+
Download AE Opt Outs	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 14:54	30-Sep-2021 17:00	04-Oct-2021 15:00	COMPLETED	+
Enter data	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 15:00	30-Sep-2021 17:00	04-Oct-2021 15:00	COMPLETED	+
Calculate payroll	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 15:00	30-Sep-2021 17:00	04-Oct-2021 15:01	COMPLETED	+
Internal approval	Internal Approval	Olive Vertime	29-Sep-2021 08:00	04-Oct-2021 15:01	30-Sep-2021 17:00	04-Oct-2021 15:01	FAILED	+
Upload review reports to myePayWindow	Manual Task	Holly Daypay	29-Sep-2021 08:00		30-Sep-2021 17:00		OVERDUE	+
Client approval	Client Approval		29-Sep-2021 08:00		30-Sep-2021 17:00		OVERDUE	+
Pay employees - submit payment files	Manual Task	Holly Daypay	30-Sep-2021 08:00		30-Sep-2021 17:00		OVERDUE	+
Upload final reports to portal	Manual Task	Holly Daypay	30-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Holly Daypay	30-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		30-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		30-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Holly Daypay	30-Sep-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generate notices and feeds	eManual Task	Holly Daypay	30-Sep-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Holly Daypay	30-Sep-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Close period	Close Run		30-Sep-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Open period	Open Run		30-Sep-2021 08:00		05-Oct-2021 17:00		NOT READY	+
Open period Create next process	Open Run Create Next Process		30-Sep-2021 08:00 30-Sep-2021 08:00		05-Oct-2021 17:00 05-Oct-2021 17:00		NOT READY	

Click the '+' symbol on the row for the Internal Approval step:

Calculate payroll	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 15:00	30-Sep-2021 17:00	04-Oct-2021 15:01	COMPLETED	+
Internal approval	Internal Approval	Olive Vertime	29-Sep-2021 08:00	04-Oct-2021 15:01	30-Sep-2021 17:00	04-Oct-2021 15:01	FAILED	-
C Rerun 💷 Step Info	Bill Step							
Upload review reports to	o Manual Task	Holly Daypay	29-Sep-2021 08:00		30-Sep-2021 17:00		OVERDUE	+

Click on Edit Step:

Edit Internal app	roval?	Save 2 Cancel
Are you sure you want to	edit Internal approval?	
Action Required By:	Holly Daypay	Select User



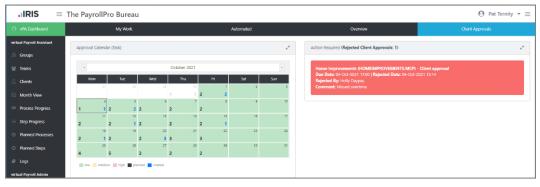
elect User	
Search	Clear
Pat Ternity Mat Ternity Olive Vertime	*
	v
	✓ Select J Cancel

Highlight the user and click on Select.

Click Save.

How to deal with rejected approvals

Under the vPA Dashboard select Client Approvals:



In the widget Action Required (Rejected Client Approvals), click on the details of the rejection which opens the View Steps screen:

uency: Weekly		Pe	riod Number: 27		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			27-Sep-2021 17:28		27-Sep-2021 17:29	COMPLETED	+
Client info received - Ready to process	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 08:00	04-Oct-2021 17:00	01-Oct-2021 11:06	COMPLETED	+
DPS Notifications count check	DPS Check		01-Oct-2021 08:00	01-Oct-2021 11:06	04-Oct-2021 17:00	01-Oct-2021 11:06	COMPLETED	+
Download DPS Notifications	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:06	04-Oct-2021 17:00	01-Oct-2021 11:06	N/A	+
Download AE Opt Outs	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:06	04-Oct-2021 17:00	01-Oct-2021 11:08	COMPLETED	+
Enter data	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:08	04-Oct-2021 17:00	01-Oct-2021 11:08	COMPLETED	+
Calculate payroll	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:08	04-Oct-2021 17:00	01-Oct-2021 11:08	COMPLETED	+
Internal approval	Internal Approval	Mat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:09	04-Oct-2021 17:00	01-Oct-2021 11:13	COMPLETED	+
Upload review reports to myePayWindow	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:13	04-Oct-2021 17:00	01-Oct-2021 11:13	COMPLETED	+
Client approval	Client Approval		01-Oct-2021 08:00	01-Oct-2021 11:14	04-Oct-2021 17:00	04-Oct-2021 15:14	FAILED	+
Pay employees - submit payment files	Manual Task	Pat Ternity	04-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY	+
Upload final reports to portal	Manual Task	Pat Ternity	04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY	+
Create Full Payment Submission	Manual Task	Pat Ternity	04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY	+
Submit Full Payment Submission	Send FPS		04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY	+
Upload payslips and P45s to myePayWindow	Empty Outbox		04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY	+
Empty myePayWindow Outbox	Manual Task	Pat Ternity	04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY	+
Auto Enrolment - generat notices and feeds	eManual Task	Pat Ternity	04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Auto Enrolment - upload feed	Manual Task	Pat Ternity	04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Close period	Close Run		04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+
Open period	Open Run		04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY	+

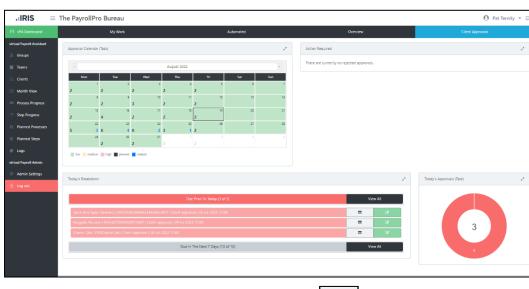
You will need to decide based on the rejection reason, which step the process needs to be re-run from.

A similar process can be done for rejected internal approvals via vPA Dashboard\My Work and the widget Action Required (Rejected Internal Approvals).

How to manually check for response to Client Approval

vPA automatically checks for a response from myePayWindow once every hour.

However, you can also check for a response.



Under vPA Dashboard select Client Approvals:

Under Today's Breakdown click on the View Process icon for the client that you need to check:

quency: Weekly		Pe	riod Number: 27		Tax Year:	2021	
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			27-Sep-2021 17:28		27-Sep-2021 17:29	COMPLETED
Client info received - Ready to process	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 08:00	04-Oct-2021 17:00	01-Oct-2021 11:06	COMPLETED
DPS Notifications count check	DPS Check		01-Oct-2021 08:00	01-Oct-2021 11:06	04-Oct-2021 17:00	01-Oct-2021 11:06	COMPLETED
Download DPS Notifications	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:06	04-Oct-2021 17:00	01-Oct-2021 11:06	N/A
Download AE Opt Outs	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:06	04-Oct-2021 17:00	01-Oct-2021 11:08	COMPLETED
Enter data	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:08	04-Oct-2021 17:00	01-Oct-2021 11:08	COMPLETED
Calculate payroll	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:08	04-Oct-2021 17:00	01-Oct-2021 11:08	COMPLETED
Internal approval	Internal Approval	Mat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:09	04-Oct-2021 17:00	01-Oct-2021 11:13	COMPLETED
Upload review reports to myePayWindow	Manual Task	Pat Ternity	01-Oct-2021 08:00	01-Oct-2021 11:13	04-Oct-2021 17:00	01-Oct-2021 11:13	COMPLETED
Client approval	Client Approval		01-Oct-2021 08:00	01-Oct-2021 11:14	04-Oct-2021 17:00		READY
Pay employees - submit payment files	Manual Task	Pat Ternity	04-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY
Upload final reports to portal	Manual Task	Pat Ternity	04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY
Create Full Payment Submission	Manual Task	Pat Ternity	04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY
Submit Full Payment Submission	Send FPS		04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY
Upload payslips and P45s to myePayWindow	Empty Outbox		04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY
Empty myePayWindow Outbox	Manual Task	Pat Ternity	04-Oct-2021 08:00		06-Oct-2021 17:00		NOT READY
Auto Enrolment - generat notices and feeds	eManual Task	Pat Ternity	04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Auto Enrolment - upload feed	Manual Task	Pat Ternity	04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Close period	Close Run		04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY
Open period	Open Run		04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY

Click on the '+' symbol for the Client approval row:



The step due date is 04-Oct-2021 17:00	PENDING	The step is currently awaiting action on myePayWindow	
d Close	The step due date is 04-Oct-2021 17:00		
			1 Close

This one is still Pending, but if the client had responded it would show whether it has been approved or rejected and the notes entered.

Does the Payroll Professional audit trail show what automated steps have done

The following automated steps that make changes to the payroll data file are recorded under the audit trail within the payroll data file in Payroll Professional, the user is shown as vPA:

- DPS Check
- Calculate
- Create FPS
- Send FPS
- Empty Outbox
- Close Run
- Open Run
- Backup

How to update the Clients details after converting payroll from Access to SQL

If you have converted payroll data files from Access to SQL, which are attached to Groups set up in vPA you will need to select the **Check For Changes** button under the **Clients** tab.

IRIS =	The PayrollPro	Bureau			\varTheta Pat Terri	ity 👻 🗏	=
vPA Dashboard	Clients				Check For	Changes	
virtual Payroll Assistant	Search	Search Clear			Sorted: Client Ref -	By: 1	
. Groups		_					
🗑 Teams	Client Ref 4	Client Name	Group	File Location			
<u>A</u> Clients	AMH	Amy's Mobile Hair	Part of 2 Groups	CI/STAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\AMYSHOMEHAIR.MCP			
Month View	4 88	Bits And Bobs	Part of 4 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDBItsandBobs			
Process Progress	<mark>≜</mark> BG	Brides And Grooms	Monthly - No Changes	CISTAR\PAYROLL PROFESSIONAL SERVERISHARED DATA\DATA\BRIDESANDGROOMS.MCP			
Step Progress	📥 CA	Crunchy Accountants	Monthly - Changes - End of Month	SCL-WEB-DEV3\SQLEXPRESS\PSDCrunchAccountants			
 Planned Processes 	A CC	Cherry Cafe	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCherryCafe			
 Planned Steps 	📥 CG	Carpets Galore	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCarpetsGalore			
e Logs	≜ сн	Country Homes	Part of 2 Groups	CISTAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\COUNTRYHOMES.MCP			
virtual Payroll Admin	A DG	Denzel's Garage	Part of 2 Groups	CISTAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\DENZELSGARAGE.MCP			

This will then check for any changes and update the Client details for the affected payrolls in all locations where the clients payroll data file information is displayed within vPA.

How to see what Group a Client is attached

Under the **Clients** tab the grid includes a column for **Group** so that you can see the group a client is attached to. Select **Clients** from the left menu:

. IRIS ≡	The PayrollPro	Bureau			$igodoldsymbol{\Theta}$ Pat Ternity $ \star \equiv $
• vPA Dashboard	Clients				Check For Changes
virtual Payroll Assistant	Search	Search Clear			Sorted: Client Ref = By: 1
. Groups					
🗑 Teams	Client Ref i	Client Name	Group	File Location	
요 Clients	AMH	Amy's Mobile Hair	Part of 2 Groups	CISTAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\AMYSHOMEHAIR.MCP	
Month View	4 88	Bits And Bobs	Part of 4 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDBitsandBobs	
Process Progress	≜ BG	Brides And Grooms	Monthly - No Changes	C1/STAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\BRIDESANDGROOMS.MCP	
Step Progress	A CA	Crunchy Accountants	Monthly - Changes - End of Month	SCL-WEB-DEV3\SQLEXPRESS\PSDCrunchAccountants	
 Planned Processes 	≜ CC	Cherry Cafe	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCherryCafe	
 Planned Steps 	≜ CG	Carpets Galore	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCarpetsGalore	
a Logs	▲ СН	Country Homes	Part of 2 Groups	C1STAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\COUNTRYHOMES.MCP	
virtual Payroll Admin	A DG	Denzel's Garage	Part of 2 Groups	CISTAR\PAIROLL PROFESSIONAL SERVER\SHARED DATA\DATA\DENZELSGARAGE.MCP	

If a client is attached to one group, the group name is displayed in the Group column, if the client is attached to multiple groups the description will show the number of groups.

	Clients			Check For Changes	0 0 0	
rhual Payroll Assistant	Search	Search Cear		Some Clear Ref- By IL	Filters	v Apply O fee
Groups	-				Group:	
Teams	Client Ref	Client Name	Group	1 File Location		
Clents	AMH	Amy's Mobile Hair	Part of 2 Groups	CI,STAR/PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\AMYSHOMEHA/R.MCP		
Month View	4 55	Bits And Bobs	Part of 4 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDBitsandBobs		
Process Progress	👍 BG	Brides And Grooms	Monthly - No Changes	CI/STAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\BRIDESANDGROOMS.MCP		
Step Progress	A CA	Crunchy Accountants	Monthly - Changes - End of Month	SCL-WEB-DEV3(SQLEXPRESS)PSDCrunchAccountants		
Planned Processes	a cc	Cherry Cafe	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCherryCafe		
Planned Steps	<mark>≜</mark> CG	Carpets Galore	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCarpetsGalore		
Logs	A CH	Country Homes	Part of 2 Groups	C1.STAR/PAYROLL PROFESSIONAL SERVER/SHARED DATA/DATA/COUNTRYHOMES.MCP		

You can filter the clients by a Group or multiple Groups, click on the burger icon in the top right-hand corner of the screen and select the Filter icon, use the drop down to select a Group(s) then click on **Apply**:

• vPA Dashboard	Clients (A	Advanced Filters App	lied)	Check for Change	es	0 © 0	
virtual Payroll Assistant	Search	Search Clear		Sorted. Chert Part - By:	14	Filters	✔ Apply O Reset
🖶 Teams	Client Ref i	Client Name	Group	File Location		Group: Monthly - Changes - End of Month X	~
요 Clients	📥 CA	Crunchy Accountants	Monthly - Changes - End of Month	SCL-WEB-DEV3\SQLEXPRESS\PSDCrunchAccountants		Monthly - Changes - Middle of Month 36	
Month View	<mark>≜</mark> CG	Carpets Galore	Part of 2 Groups	SCL-WEB-DEV3\SQLEXPRESS\PSDCarpetsGalore			
Process Progress	A DS	Duke Solicitors	Monthly - Changes - End of Month	CI\STAR\PAYROLL PROFESSIONAL SERVER\SHARED DATA\DATA\DUKESOLICITORS.MCP			
= Step Progress	A FFG	Fighting Fit Gym	Monthly - Changes - End of Month	SCL-WEB-DEV3\SQLEXPRESS\PSDFightingFitGym			
 Planned Processes 	& MMS	Mike's Motorbike Shop	Monthly - Changes - End of Month	SCL-WEB-DEV3\SQLEXPRESS\PSDMikesMotorbikeShop			
 Planned Steps 	📥 SJ	Shiny Jewellers	Monthly - Changes - Middle of Month	C:\STAR\PRIVROLL PROFESSIONAL SERVER\SHARED DATA\DATA\SHINYJEWELLERS.MCP			
a Logs	A WWD	Wallanders Windows & Doors	Monthly - Changes - End of Month	SCL-WEB-DEV3/SQLEXPRESS/PSDWallandersWindowsDoors			
virtual Payroll Admin							

How can I export the information shown in the grids

You can export information shown in the grids using the buttons Export as CSV and Export as XLSX:

• vPA Dashboard	Groups (Advanced Filters Applied)							+ New Group	C Refresh
virtual Payroll Assistant	Search Search Clear						Status: Enabled -	Sorted: Name~	By: Ik
A Groups									
🗑 Teams	Name 4	Frequency :	Period Number	Tax Year	Pay Day/Date	Region :	Assigned Team	Status :	
🚊 Clients	3 Monthly - Changes - End of Month	Monthly	2	2022	31	England	Office 1	INABLID	
Month View	🔀 Monthly - No Changes	Monthly	2	2022	28	Scotland	Office 1	INABLED	+
Process Progress	🔀 Weekly - Directors	Weekly	5	2022	Monday	England	Directors	ENABLED	+
Step Progress	🔤 Weekly - Thursday	Weekly	4	2022	Thursday	England	Office 1	ENABLED	+
 Planned Processes 								Showing record 1 to 4	of 4 item(s)
 Planned Steps 								xport as CSV Expor	et ave VI CV
₽ Logs							-	10011 83 C3V	100 0000
virtual Payroll Admin									

These export buttons are available on the following pages:

- Groups
- Teams
- Clients

- Process Progress
- Step Progress
- Planned Processes
- Planned Steps
- Logs

When you select either of the export buttons the information displayed in the grid on the selected page is exported.

After an export button is selected it is then disabled until the page is refreshed or the grid is reloaded by changing the filter.

The name of the export file is based on the page selected and the export button selected, for example Groups.xlsx, Groups.csv

When you select the export button if there is already a file with the export name, then the new file will be suffixed numerically, for example Groups (1).xlsx

How to change the number of rows showing in the grids

In the vPA website click on the username in the top right-hand corner:

		\rm Pat Ternity 💌	Ξ
		Account	
	0	User Settings	n.
s:	•	Logout	F

Click on User Settings, the following screen appear:

贷 Settings			Save Close
User	Grid Settings		
	Rows Per Page:	50	\$

Using the drop down select the number of rows to appear in each grid:

🕸 Setting	gs						✓ Save 10	Close
User		Grid Setting	js					
		Rows Per Pa	ge:	20 5 10				¢
	Weekly - Directors		Weekly - Directors	15 20 50				Di
						 12-Aug-2022	19-Aug-2022	

Once you have made your selection, click on Save.

This setting is saved for the user logged into vPA website.

Signing off manual tasks as complete and responding to internal approvals

For you to have accurate visibility of processing progress across your clients it is important that users have the required discipline and ensure that any internal approval and manual steps assigned to them (or pool tasks they work on) are signed-off as soon as they are completed. This has an impact on when any subsequent tasks are shown as ready 'to be worked on' so it is very important that this discipline is adhered to by all users.

There are two ways that manual steps and internal approvals can be signed off:

- Via Payroll Professional
- Via vPA website

Payroll Professional should be the default option as this is where majority of processing steps take place and from where it is most logical to 'sign-off'.

Sign-off via the vPA website, is a secondary option and may be useful for payroll managers or team leaders as a backup option.

Via Payroll Professional

In Payroll Professional, Home tab\Virtual Payroll Assistant section:

@ 👩 ا 🔬 😭 ا 関	2 題 え-10	© I∓ Pay	yroll Prot	fessional								-		×
File Home	Admin Tables	Data	Run	Utilities	Reporting	Help								≈ 🕜
	👚 🐔	4	G		8		九		F		0	\mathbb{O}		
New Open Close	Tax National Insurance	Banks	Pensions	Pay Components	Employer	Employees	Pay Run *	Run General Reports		Report Management	BMS	vPA Work List	Exit	
Payroll File	Tables	Banks		Da	ata		Run		Reportin	g	BMS	virtual Payroll Assistant	Exit	

Click Work List:

Open Parel See And Grooms ** Croines Bet BG CC CC CC CC CC CC CC CC CC C	Print Group Market N		T Last Aucessed V Fite Location 2 Uny 2020 15 11-02 SCL Veb Cen 25 SL Superso 24 May 2020 15 21-02 - C (SacHyper) Housesing SarrelDard Da 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 25 SCL Veb Cen 25 SL Superso 34 May 2020 15 SCL Superson Superson SuperSuperson 35 May 2020 15 SCL Superson SuperSuperson SuperSuperson 35 May 2020 15 SCL Superson SuperSuperson SuperSuperson 35 May 2020 15 SCL Superson SuperSuperson SuperSuperson 35 May 2020 15 SCL Superson SuperSuperson 35 May 2020 15 SCL Superson 35 May 2020 15 S	V	Seg Of Hide Not Near A Conce Des Dar Concentration of the Sector Sect	⊽ Due Time
des And Grooms V Client Ref B8 CG CC CH CA DG DS DS	V Is SQL V	✓ Data File 7 PSD8:sandBobs BridearadGrooms PSDCarpettGalore PSDCherryCafe CoutryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V	Due Date Your Work For Al Clients Client ** Otopia Die Date 25 May 2000 (21 kms) Die Date 21 May 2000 (21 kms) Die Date 24 May 2000 (21 kms)	⊽ Duc Time
des And Grooms V Client Ref B8 CG CC CH CA DG DS DS	V Is SQL V	✓ Data File 7 PSD8:sandBobs BridearadGrooms PSDCarpettGalore PSDCherryCafe CoutryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V	Due Date : 27 May 2020 (7 items) Due Date : 28 May 2020 (3 items) Due Date : 28 May 2020 (3 items) Due Date : 01 Jun 2020 (2 items)	
✓ Client Ref B8 CG CC CH CA DG DS	N N N N	PSDBitsandBobs BridesandGrooms PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V	Due Date : 01 Jun 2020 (2 items)	
✓ Client Ref B8 CG CC CH CA DG DS	N N N N	PSDBitsandBobs BridesandGrooms PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V	C Due Duei : 99 Jun 2020 (1 Jann)	
✓ Client Ref B8 CG CC CH CA DG DS	N N N N	PSDBitsandBobs BridesandGrooms PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V		
BB BG CG CC CH CA DG DS	N N N N	PSDBitsandBobs BridesandGrooms PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V		
BB BG CG CC CH CA DG DS	N N N N	PSDBitsandBobs BridesandGrooms PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	22 May 2020 15:13-42 SCI-Web-Dev/JSQLExpress 26 May 2020 12:12- C.Start/Payroll Professional Server(Shared Da 26 May 2020 13:53-23 SCI-Web-Dev/JSQLExpress 26 May 2020 13:57-16 SCI-Web-Dev/JSQLExpress 26 May 2020 13:22.54 C/Start Payroll Professional Server/Shared Data/D	V VateQlete V		
BG CG CC CH CA DG DS	N N N N N N N N N N N N N N N N N N N	BridesandGrooms PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	26 May 2020 12:12 C. \Start/Payroll Professional Server\Shared De 26 May 2020 13:35:2 SCL-Veb: Der/3/SQLExpress 26 May 2020 11:57:16 SCL-Veb: Der/3/SQLExpress 26 May 2020 13:25:4 C:GharPayroll Professional Server\Shared Data/D	stalData\ V		
CG CC CH CA DG DS		PSDCarpetsGalore PSDCherryCafe CountryHomes.mcp	26 May 2020 13:35:32 SCL-Meb-Dev3ISQLExpress 26 May 2020 11:57:16 SCL-Meb-Dev3ISQLExpress 26 May 2020 13:22:54 CriSter/Payroll Professional Server/Shared Data/D	V		
CC CH CA DG DS		PSDCherryCafe CountryHomes.mcp	26 May 2020 11:57:16 SCL-Web-Dev3/SQLExpress 26 May 2020 13:22:54 C:Star/Payroll Professional Server/Shared Data/D	V		
CH CA DG DS	2	CountryHomes.mcp	26 May 2020 13:22:54 C. Starl Payroll Professional Server Shared Data D			
DG DS	×.					
DG DS			26 May 2020 13:55:30 SCL-Web-Dev3/SQLExpress	V		
DS		DenzelsGarage.mcp				
550	E	DukeSolicitors.mcp	26 May 2020 13:57:11 C:StarlPayroll Professional Server/Shared Data/D			
	12	PSDFightingFitGym	26 May 2020 13:49:44 SCL-Web-Dev3/SQLExpress	7		
HH	V	PSDHelpingHands	26 May 2020 09:10:16 SCL-Web-Dev3/SQLExpress	7		
н	10	HomeImprovements.	26 May 2020 11:49:14 C:Starl Payroll Professional Server/Shared Data/2			
MC	2	PSDMenagerieCastle	26 May 2020 13:18:22 SCL-Web-Dev3/SQLExpress	V		
MMS	8	PSDMikesMotorbike.	26 May 2020 13:54:21 SCL-Web-Dev3/SQLExpress	V		
NN	13	NuggetsNursery.mcp	26 May 2020 11:56:22 C1Starl Payroll Professional Server\Shared Data/2	Data\ 🗸		
	1	ShellysCycleShop.m.				
	12					
	11					
WS	1	PSDWillowsSurgery	22 May 2020 13: (201) SCL-Vieb-Dev3/SQLExpress	V		
	MMAS NN SCS SJ SD SP ers SSC S8F	MMS NN SCS SJ SD SD SD SD SD TTY R THH SD WFS THH SD VWD R SD SD SD SD SD SD SD SD	MIS 9 PS/Musiket/bits NVI Nugatifularey: no: Nugatifularey: no: SIS Selve/Cyck/Sec Selve/Cyck/Sec SI Selve/Cyck/Sec Selve/Cyck/Sec SI Selve/Cyck/Sec Selve/Cyck/Sec SI Severite/Sec Selve/Cyck/Sec SI Severite/Sec Selve/Cyck/Sec SI Severite/Sec Severite/Sec SI Severite/Sec Severite/Sec SI Severite/Sec Severite/Sec SI Severite/Sec Severite/Sec Miss Trans.en/Anarjek Misserierand/Sec Miss Misserierand/Sec Misserierand/Sec	MMS 9 FSOMArehotohika 23 ktps; 200113421 20114214 201141414 20114141444	MMS 9 PS/MarkHordhik, 3 Nag. 200135421 Str. And Deck SSLEpress 9 NH Nagesharen, moz. 3 Nag. 20013522 Str. And Decksand Berruf Stare Data Data 9 SGS Selvely-CycleRoum, 3 Nag. 20013722 CSLP Prop. Threasond Berruf Stare Data Data 9 SG Selvely-CycleRoum, 3 Nag. 2002333 CSLP Prop. Threasond Berruf Stare Data Data 9 SG Selvely-CycleRoum, 3 Nag. 2002333 CSLP Prop. Threasond Berruf Stare Data Data 9 SG Selvely-CycleRoum, 3 Nag. 2002333 CSLP Prop. Threasond Berruf Stare Data Data 9 SG Selvely-CycleRoum, 3 Nag. 2002333 CSLP Prop. Threasond Berruf Stare Data Data 9 SG Selvely-CycleRoum, 3 Nag. 2001313151 CSLP Prop. Threasond Berruf Stare Data Data 9 SSF SectoreStaren, 2 Nag. 200131521 CSLP Prop. Threasond Berruf Stare Data Data 9 SSF SectoreStaren, 2 Nag. 200131521 CSLP Prop. Threasond Berruf Stare Data Data 9 SSF SectoreStaren, 2 Nag. 200131201 SSL CSLP Prop. Threasond Berruf Stare Data Data 9 TYT V PSD Communitive. Nag. 200112201 SL Communitive Stare Data Dat	MMS 9 PSXMaxMetoribus, 2 31 km, 2001 134/21 SCI. Vanb. End. SGI. Dynamic Data Data 9 NN Nagasthammer, 201 km, 2001 134/21 SCI. Vanb. End. SGI. Dynamic Data Data 9 SGS Selvely-CycleRoum, 201 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SGI Selvely-CycleRoum, 201 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SGI Selvely-CycleRoum, 201 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SGI Selvely-CycleRoum, 201 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SGI Selvely-CycleRoum, 201 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SSF SecoleRoum, 201 km, 201 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SSF SecoleRoum, 21 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 SSF SecoleRoum, 21 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 TTY V PS0/communitiese, 25 km, 2002 SCI. SGI. Pyrop. Threasonal Berne/Datase Data Data 9 LDL Montal SGI. SGI. Pyrop. SGI. SGI. Pyrop. Threasonal Berne/Datase Data Data Data 9 LDL Montal SGI. SGI. SGI. SGI. Pyrop. SGI. SGI. SGI. SG

Without a data file open, the right-hand side of the screen displays a list of due dates with the number of tasks across all clients. This includes manual steps and internal approvals assigned to the logged in Payroll Professional user. Click '+' symbol to expand to see the tasks.

Insurance		69 884	, in				
Insurance		A HR	7				
	anks Pensions Pay Components	Employer Employ	ees Pay Run -	Run General Prin Reports Macr	t Report BMS vPA Work Exit os Management - List		
avroll File Tables B	anks Data		Run	Reports Mach			
e «			India	(appoint)	ang and interreptonestant and		
Pages	🕅 Bureau Home Page					C X	🖌 🖉 🤁 📢
		-	00	0			Sign Off Hide Not Ready Refresh Done
Bureau Home Page			XX	XX			(Inclusion of the second seco
			b				Due Date /
Active File Home Page		D	XX				Your Work For All Clients
		15 1					Client ⊽ Datafile ⊽ Step ⊽ Due Time → Due Date : 26 May 2020 (2 items)
							 Due Date : 26 May 2020 (2 items) Williams Farm, Williams FarmS, Pay employees, 17:00
	New Payroll	Open Payroll	Print Grou	p Reporting			Helping Hands PSDHelpingHa Internal approval 17:00
			Ma	cros			 Due Date : 27 May 2020 (7 items)
	Datafile Select						Bits And Bobs PSDBitsandBo. Client info recei. 17:00
							Bits And Bobs PSDBitsandBo. Download DPS. 17:00
	Client Name : Bride	es And Grooms					Bits And Bobs PSDBitsandBo Download AE. 17:00
	Select						Bits And Bobs PSDBitsandBo Enter data 17:00
	V Client Name	V Client Ref	V Is SQL	7 Data File	LastAccessed V File Location	Is Payrol V Is	Bits And Bobs PSDBitsendBo., Calculate payroll 17:00 Bits And Bobs PSDBitsendBo., Upload review r., 17:00
	Eits And Bobs	BB	1 15 SGL	PSDBitsandBobs	22 May 2020 15:13:42 SCL-Web-Dev3/SQLExpress	V	Bits And Bobs PSDBitsandBo Uproad review r 17:00 Bits And Bobs PSDBitsandBo Pay employees 17:00
	Brides And Grooms	BG	-	BridesandGrooms	26 May 2020 12:12. C:\Star\Payroll Professional Server\Shared DataDatah	2	Due Date : 28 May 2020 (3 items)
	Carpete Galore	CG	100	PSDCarpets Galore	26 May 2020 13:35:32 SCL-Web-Dev/3/SQLExpress	1	Due Dete 128 May 2020 (3 items) / Williams Farm. Williams FarmS. Upload final rep. 17:00
	Cherry Cafe	CC	V	PSDCherryCale	26 May 2020 11:57:16 SCL-Web-Dev3/SQLExpress	V	Williams Farm. WilliamsFarmS. Create Full Pay. 17:00
	Country Homes	CH	10	CountryHomes.mcp	26 May 2020 13:22:54 C:\StarlPayroll Professional Server\Shared Data\Data\	V	Williams Farm., WilliamsFarmS., Empty myePay., 17:00
	Crunchy Accountants	CA	×.	PSDCrunchAccount.		V	- Due Date : 29 May 2020 (5 items)
	Denzel's Garage	DG	13	DenzelsGarage.mcp	22 May 2020 15:54:40 C:StariPayroll Professional Server/Shared Data/Data	N.	Bits And Bobs PSDBitsandBo. Upload final rep. 17:00
	Duke Solicitors Fighting Fit Gym	DS	15	DukeSolicitors.mcp PSDFightingFitGym	26 May 2020 13:57:11 C:/Star/Payroll Professional Server/Shared Data/Data/ 26 May 2020 13:49:44 SCL-Web-Dev3/SQLExpress	V	Bits And Bobs PSDBitsandBo. Create Full Pay. 17:00
	Helping Hands	HH	17 17	PSDHightingHitGym PSDHelpingHands	26 May 2020 13:43:44 SCL-Web-Dev3/SQLExpress 26 May 2020 09:10:16 SCL-Web-Dev3/SQLExpress	V	Bits And Bobs PSDBitsandBo Empty myePay 17:00
	Home Improvements	H	10	Homelmorevements	26 May 2020 11:49:14 C:Star/Payroll Professional Server/Shared Data/Data/	2	Williams Farm, WilliamsFarmS, Auto Enrolment, 17:00 Williams Farm, WilliamsFarmS, Auto Enrolment, 17:00
	Menagerie Castle	MC	2	PSDMenagerieCastle		v .	Due Date : 01 Jun 2020 (2 items)
	Mike's Motorbike Shop	MMS		PSDMikesMotorbike.		V	 Bits And Bobs PSDBitsandBo, Auto Enrolment, 17:00
	Nuggets Nursery	NN	1	NuggetsNursery.mcp	26 May 2020 11:56:22 C:Star/Payroll Professional Server/Shared Data/Data	V	Bits And Bobs PSDBitsandBo. Auto Enrolment. 17:00
	Shelly's Cycle Shop	SCS	11		26 May 2020 13:17:20 C:StarlPayroll Professional Server/Shared Data/Data/	×	Due Date : 09 Jun 2020 (1 item)
	Shiny Jewellers	SJ	13		26 May 2020 09:23:38 C:StariPayroll Professional Server/Shared Data/Data/	V	Shiny Jewellers Shiny Jewellers Internal approval 17:00
	Smiths Decorators	SD	12		26 May 2020 13:19:15 SCL-Web-Dev3/SQLExpress	×.	
	Special Presents	SP	1		26 May 2020 11:08:29 C:(Star/Payroll Professional Server/Shared Data/Data)	V	
	Spick And Span Cleaner Sweet Bites Factory	s SSC SBF	- 12	SpickandSpanClean. SweetBitesFactory	26 May 2020 11:51:01 C:Star/Payroll Professional Server/Shared Data/Data	8	
	Sweet bites Factory Tomm/a Timber Yard	TTY	EI 17	PSDTommysTimber	22 May 2020 16:54:25 C:Star/Payroll Professional Server/Shared Data/Data/ 26 May 2020 13:20:00 SCL-Web-Dev3/SQLExpress	V	
	Treasure Nursing Home		10	TreasureNursingHo.		V	
	Wallanders Windows &		12	PSD/vallanders/vln.	26 May 2020 13:46:16 SCL-Web-Dev3/SQLExpress	2	
	Williams Farm Shop	WFS	8	Williams FarmShop		v	
	Willows Surgery	WS	1	PSD///illowsSurgery	22 May 2020 15:12:01 SCL-Web-Dev3/SQLExpress	V	

With an open data file, the tasks list displays only those tasks for the open client file assigned to the logged in Payroll Professional user:

*******	🧹 🗭 🔁 🖣						
	Sign Off Hide Not Ready Refresh Done						
	Due Date 🛆						
	Your Work For This Client						
S	Step \[\begin{aligned} \begin{aligned} \Delta Due Time \[\begin{aligned} \Delta Scheduled Date \[\Delta \] \]						
-	- Due Date : 27 May 2020 (7 items)						
~	Client info recei	17:00	Ready				
~	/ Download DPS	17:00	26 May 2020 08:00				
2	Download AE	17:00	26 May 2020 08:00				
~	Enter data	17:00	26 May 2020 08:00				
2	Calculate payroll	17:00	26 May 2020 08:00				
2	/ Upload review r	17:00	26 May 2020 08:00				
2	Pay employees	17:00	27 May 2020 08:00				
=	Due Date : 29 May 2	2020 (3 items)					
~	/ Upload final rep	17:00	27 May 2020 08:00				
~	Create Full Pay	17:00	27 May 2020 08:00				
2	Empty myePay	17:00	27 May 2020 08:00				
E	Due Date : 01 Jun 2	020 (2 items)					
2	Auto Enrolment	17:00	27 May 2020 08:00				
2	Auto Enrolment	17:00	27 May 2020 08:00				

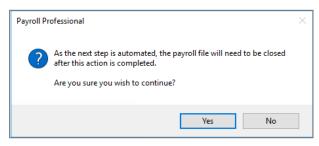
Manual tasks show with the icon and the internal approvals are shown with the icon .

Use the **Refresh** button to update the work list.

Signing off manual tasks

For a manual task when the required processing activity is completed highlight the corresponding step/task in the list and then click on Sign Off button in the form header to mark it as completed.

If you have the payroll file open and the next step is automated, then you will see the following message:



If you want to proceed, select **Yes** and the data file will automatically close for the next step to start. If you need to make further changes to the payroll before the automated step runs, then select **No** the step you were marking as complete will remain uncompleted until you are ready to sign it off as complete for the next step to run.

Responding to internal approvals

For an internal approval step when you have checked the payroll then highlight the corresponding step in the list and then click on **Respond** button in the form header:

Respond Hide Not Ready Refresh Done Due Date Your Work For All Clients Client Image: Clients Image: Clients - Due Date : 24 Aug 2020 (5 items) Image: Client Image: Client Menagerie Ca. PSDMenagerie. Internal approv 17:00 Image: Client PSDMenagerie. Internal approv 17:00 Image: Client PSDWallanders Internal approval 17:00 Image: Client Home Improve Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Home Date : 25 Aug 2020 (9 items) Internal approval 17:00 Due Date : 27 Aug 2020 (3 items) Internal approval 17:00 Due Date :	📄 👳 🎅 🖣							
Your Work For All Clients Client V Due Time V Client V Due Time V Menagerie Ca. PSDMenagerie. Internal approv 17:00 Menagerie Ca. PSDMenagerie. Internal approv 17:00 Tommy's Timb. PSDTommysTi Internal approval 17:00 Wallanders Wi PSDWallanders Internal approval 17:00 Treasure Nursi TreasureNursin Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Home Date : 25 Aug 2020 (9 items) Internal approval 17:00 Due Date : 26 Aug 2020 (7 items) Internal approval 17:00 Due Date : 27 Aug 2020 (3 items) Due Date : 28 Aug 2020 (5 items) Ue Date : 01 Sep 2020 (2 items) Due Date : 01 Sep 2020 (2 items) Due Date : 07 Sep 2020 (1 item) Internal approval Internal approval	Respond Hide Not Ready Refresh Done							
Client V Datafile V Step V Due Time V - Due Date : 24 Aug 2020 (5 items) - </th <th colspan="7">Due Date 🖉</th>	Due Date 🖉							
 Due Date : 24 Aug 2020 (5 items) Menagerie Ca PSDMenagerie Internal approv 17:00 Tommy's Timb PSDTommysTi Internal approval 17:00 Wallanders Wi PSDWallanders Internal approval 17:00 Treasure Nursi TreasureNursin Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Due Date : 25 Aug 2020 (9 items) Due Date : 26 Aug 2020 (7 items) Due Date : 27 Aug 2020 (3 items) Due Date : 01 Sep 2020 (2 items) Due Date : 07 Sep 2020 (1 item) 	Your Work For All Clients							
Menagerie Ca. PSDMenagerie. Internal approv 17:00 Tommy's Timb PSDTommysTi Internal approval 17:00 Wallanders Wi PSDWallanders Internal approval 17:00 Treasure Nursi TreasureNursin Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Home Date : 25 Aug 2020 (9 items) Internal approval 17:00 Due Date : 26 Aug 2020 (7 items) Internal approval 17:00 Due Date : 27 Aug 2020 (3 items) Internal approval Internal approval Due Date : 01 Sep 2020 (2 items) Internal approval Internal approval Due Date : 07 Sep 2020 (1 item) Internal approval Internal approval	Client V	Datafile 🛛 🖓	Step 🛛 🖓	Due Time 💎				
Tommy's Timb PSDTommysTi Internal approval 17:00 Wallanders Wi PSDWallanders Internal approval 17:00 Treasure Nursi TreasureNursin Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Houe Date : 25 Aug 2020 (9 items) Internal approval 17:00 Due Date : 27 Aug 2020 (3 items) Internal approval 17:00 Due Date : 28 Aug 2020 (5 items) Internal approval 10 items Due Date : 01 Sep 2020 (2 items) Internal approval 10 items Due Date : 07 Sep 2020 (1 item) Items 10 items								
Wallanders Wi PSDWallanders Internal approval 17:00 Treasure Nursi TreasureNursin Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 + Due Date : 25 Aug 2020 (9 items) • • + Due Date : 26 Aug 2020 (7 items) • • • Due Date : 27 Aug 2020 (3 items) • • • Due Date : 28 Aug 2020 (5 items) • • • Due Date : 01 Sep 2020 (2 items) • • • Due Date : 07 Sep 2020 (1 item) • •	Menagerie Ca	PSDMenagerie	Internal approv	17:00				
 Treasure Nursi TreasureNursin Internal approval 17:00 Home Improve HomeImprove Internal approval 17:00 Due Date : 25 Aug 2020 (9 items) Due Date : 26 Aug 2020 (7 items) Due Date : 27 Aug 2020 (3 items) Due Date : 28 Aug 2020 (5 items) Due Date : 01 Sep 2020 (2 items) Due Date : 07 Sep 2020 (1 item) 	🍺 Tommy's Timb	PSDTommysTi Internal approval 17:00						
Home Improve HomeImprove Internal approval 17:00 + Due Date : 25 Aug 2020 (9 items) + - <td>🎲 Wallanders Wi</td> <td colspan="6">allanders Wi PSDWallanders Internal approval 17:00</td>	🎲 Wallanders Wi	allanders Wi PSDWallanders Internal approval 17:00						
 Due Date : 25 Aug 2020 (9 items) Due Date : 26 Aug 2020 (7 items) Due Date : 27 Aug 2020 (3 items) Due Date : 28 Aug 2020 (5 items) Due Date : 01 Sep 2020 (2 items) Due Date : 07 Sep 2020 (1 item) 	🍃 Treasure Nursi	TreasureNursin	Internal approval	17:00				
 + Due Date : 26 Aug 2020 (7 items) + Due Date : 27 Aug 2020 (3 items) + Due Date : 28 Aug 2020 (5 items) + Due Date : 01 Sep 2020 (2 items) + Due Date : 07 Sep 2020 (1 item) 		HomeImprove	Internal approval	17:00				
 + Due Date : 27 Aug 2020 (3 items) + Due Date : 28 Aug 2020 (5 items) + Due Date : 01 Sep 2020 (2 items) + Due Date : 07 Sep 2020 (1 item) 	+ Due Date : 25 Aug	2020 (9 items)						
+ Due Date : 28 Aug 2020 (5 items) + Due Date : 01 Sep 2020 (2 items) + Due Date : 07 Sep 2020 (1 item)	+ Due Date : 26 Aug	2020 (7 items)						
+ Due Date : 01 Sep 2020 (2 items) + Due Date : 07 Sep 2020 (1 item)	+ Due Date : 27 Aug	2020 (3 items)						
+ Due Date : 07 Sep 2020 (1 item)	+ Due Date : 28 Aug	+ Due Date : 28 Aug 2020 (5 items)						
	+ Due Date : 01 Sep	2020 (2 items)						
+ Due Date : 14 Sep 2020 (1 item)	+ Due Date : 07 Sep	2020 (1 item)						
	+ Due Date : 14 Sep	2020 (1 item)						

The following form is displayed for you to choose whether to **Approve** the payroll so further processing can proceed or **Reject** as changes are required:

Dia Approval Step Response	×
Confirm Cancel	
Set Status	
[Approved] O Rejected	
You can enter a reason for the outcome of this approval step	

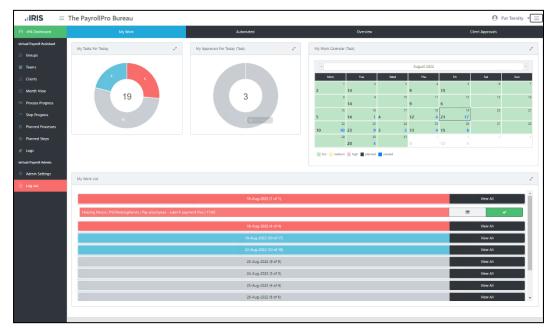
When you select Rejected, you must also select a user next to Action Required By:

Approval Step Response	×
Confirm Cancel	
Set Status	
Approved Rejected Action Require You can enter a reason for the outcome of this approve	Pat Ternity

When set as Rejected you must enter a reason, which will then be recorded against the step for future reference, click on **Confirm**. If you reject the internal approval step then the payroll will need to be re-run, see the section **How to rerun process step(s) for a client**.

Via vPA website

To sign off manual tasks and respond to internal approvals via the vPA Dashboard page My Work:



Use the 'My Work List' chart to sign-off a manual task or respond to an internal approval. A task can only be marked as completed or responded to if the appropriate button is enabled and will be blue for Ready, red for Overdue. The tasks shown in grey are Not Ready, they cannot be completed or signed off yet as they are pending (not due to be started based on the schedule and step timing set).

Manual tasks

On the row that you want to sign the task off click on **_____** in the chart to mark the task/step as complete.



Click Sign Off to confirm completion.

Internal approvals

On the row that you want to respond to the internal approval click on in the chart to Approve the payroll so further processing can proceed or **Reject** as changes are required.

Internal Approval Step Response		
Set status: O Approved O Rejected You must enter a reason for the outcome of this approval step (maximum number of characters - 250).		
Response explanation		
	✓ Confirm	1 Back

If you are approving the step, the reason field is not mandatory, if you enter a reason it will then be recorded against the step for future reference, click on **Confirm**.

If you are rejecting the step, you must enter a reason and select a user for the step to be returned to next to Action Required By:

Internal Approval St	ep Response	
Set status: O Approve You must enter a reason f	ed 🧿 Rejected for the outcome of this approval step (maximum number of characters - 250).	
Response explanation		
Action Required By:	Select User	r Clear
	✓ Confirm	# Back

Once you have entered the reason and selected the user, click on Confirm:

Internal Approval St	ep Response		
Set status: O Approve You must enter a reason fo	d O Rejected or the outcome of this approval step (maxim	ium number of characters - 250).	
Response explanation			
Action Required By:	Olive Vertime	Select User	Clear
		✓ Confirm	1 Back

If you reject the internal approval step then the payroll will need to be re-run, see the section **How to rerun process step(s) for a client**.

Via Step Progress

Alternatively, you can sign manual tasks off and respond to internal approvals via the **Step Progress** left-menu option:

	Ste	ep Progress (Advance	d Filters Ap	plied)								C Re	fresh
virtual Payroll Assistant	Sea	rch Search Clear								Status	Al - Sorted:	0.00	e 11
B Groups													9 *=
🗑 Teams	0	Client	Process	Group	Step	Туре	Scheduled	Started	Due	Completed	Assigned	Status	
Clients			-		1		h				User	4	_
Month View		Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Auto Enrolment - generate notices and feeds	Manual Task	28-Sep-2021 08:00	01-Oct-2021 11:22	01-Oct- 2021 17:00		Pat Ternity		+
Process Progress	0	Williams Farm Shop	Weekly - Paid	Weekly -	Auto Enrolment - upload feed	Manual	28-Sep-2021		01-Oct-		Pat Ternity	INCOME ANY	+
		(WILLIAMSFARMSHOP.MCP)	Thursdays	Thursday		Task	08:00		2021 17:00				
Planned Processes	o	Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Auto Enrolment - generate notices and feeds	Manual Task	28-Sep-2021 08:00	01-Oct-2021 11:22	01-Oct- 2021 17:00		Pat Ternity	ETADY.	-
Planned Steps													
🖻 Logs		Sign Off Reassign View Process	Step Info										
virtual Payroll Admin		Willows Surgery (PSDWillowsSurgery)	18 Weekly - Fridays	Weekly -	Upload final reports to portal	Manual	29-Sep-2021	01-Oct-2021	01-Oct-		Holly		

Find the step in the listing (use filters as required) and expand the row by clicking '+' symbol, click on to display following screen:

quency: Weekly		F	eriod Number: 26		Tax Year:	2021		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			27-Sep-2021 17:26		27-Sep-2021 17:28	COMPLETED	D
Client info received - Ready to process							COMPLETED	D
DPS Notifications count check			27-Sep-2021 08:00				COMPLETED	D
Download DPS Notifications	Manual Task	Pat Ternity	27-Sep-2021 08:00	01-Oct-2021 11:03	28-Sep-2021 17:00	01-Oct-2021 11:03	N/A	
Download AE Opt Outs	Manual Task	Pat Ternity	27-Sep-2021 08:00	01-Oct-2021 11:03	28-Sep-2021 17:00	01-Oct-2021 11:05	COMPLETED	D
Enter data	Manual Task	Pat Ternity	27-Sep-2021 08:00	01-Oct-2021 11:05	28-Sep-2021 17:00	01-Oct-2021 11:05	COMPLETED	D
Calculate payroll	Manual Task	Pat Ternity	27-Sep-2021 08:00	01-Oct-2021 11:05	28-Sep-2021 17:00	01-Oct-2021 11:06	COMPLETED	D
Internal approval	Internal Approval	Mat Ternity	27-Sep-2021 08:00	01-Oct-2021 11:06	28-Sep-2021 17:00	01-Oct-2021 11:11	COMPLETED	D
Upload review reports to myePayWindow	Manual Task	Pat Ternity	27-Sep-2021 08:00	01-Oct-2021 11:11	28-Sep-2021 17:00	01-Oct-2021 11:13	COMPLETED	D
Client approval	Client Approval		27-Sep-2021 08:00	01-Oct-2021 11:14	28-Sep-2021 17:00	01-Oct-2021 11:14	COMPLETED	D
Pay employees - submit payment files	Manual Task		28-Sep-2021 08:00				COMPLETED	D
Upload final reports to portal	Manual Task	Pat Ternity	28-Sep-2021 08:00	01-Oct-2021 11:18	30-Sep-2021 17:00	01-Oct-2021 11:18	COMPLETED	D
Create Full Payment Submission			28-Sep-2021 08:00				COMPLETED	D
Submit Full Payment Submission	Send FPS		28-Sep-2021 08:00	01-Oct-2021 11:18	30-Sep-2021 17:00	01-Oct-2021 11:22	COMPLETED	D
Upload payslips and P45s to myePayWindow	Empty Outbox		28-Sep-2021 08:00	01-Oct-2021 11:22	30-Sep-2021 17:00	01-Oct-2021 11:22	COMPLETED	D
Empty myePayWindow Outbox	Manual Task	Pat Ternity	28-Sep-2021 08:00	01-Oct-2021 11:22	30-Sep-2021 17:00	01-Oct-2021 11:22	N/A	
Auto Enrolment - generati notices and feeds	eManual Task	Pat Ternity	28-Sep-2021 08:00	01-Oct-2021 11:22	01-Oct-2021 17:00		READY	
Auto Enrolment - upload feed	Manual Task	Pat Ternity	28-Sep-2021 08:00		01-Oct-2021 17:00		NOT READY	3
Close period	Close Run		28-Sep-2021 08:00		01-Oct-2021 17:00		NOT READY	7
Open period	Open Run		28-Sep-2021 08:00		01-Oct-2021 17:00		NOT READY	7
Create next process	Create Next Process		28-Sep-2021 08:00		01-Oct-2021 17:00		NOT READY	

Manual task

Click on '+' symbol to expand the row of the step that you want to sign-off a manual task:

Auto Enrolment - generateManual Task notices and feeds	Pat Ternity	28-Sep-2021 08:00	01-Oct-2021 11:22	01-Oct-2021 17:00	R	ADY
🖌 Sign Off 🔄 Step Info						
Auto Enrolment - upload Manual Task	Pat Ternity	28-Sep-2021 08:00		01-Oct-2021 17:00		DT READY

Click on sign off to mark the manual task as complete.

Internal approval

Click on '+' symbol to expand the row of the step that you want to Approve or Reject an internal approval:



Click on the following screen is displayed for you to Approve the payroll so further processing can proceed or **Reject** as changes are required.

Internal Approval Step Response	
Set status: O Approved O Rejected You must enter a reason for the outcome of this approval step (maximum number of characters -	250).
Response explanation	
	Confirm

If you are approving the step, you must enter a reason, which will then be recorded against the step for future reference, click on **Confirm**.

If you are rejecting the step, you must enter a reason and select a user for the step to be returned to next to Action Required By:

Internal Approval St	ep Response	
Set status: O Approve You must enter a reason f	d 🧿 Rejected or the outcome of this approval step (maximum number of d	characters - 250).
Response explanation		
Action Required By:		Select User Clear
		✓ Confirm 1 Back

Once you have entered the reason and selected the user, click on Confirm:

Internal Approval St	ep Response	
Set status: O Approve You must enter a reason f	d O Rejected or the outcome of this approval step (maximum number of ch	aracters - 250).
Response explanation		
Action Required By:	Olive Vertime	Select User Clea
		✓ Confirm 🛃 Ba

If you reject the internal approval step then the payroll will need to be re-run, see the section **How to rerun process step(s) for a client**.

Via Process Progress

From **Process Progress** left-menu option, find the Client/process in the listing (use filters as required) click '+' symbol to expand the Clients process:

IRIS =	The PayrollPro Bureau										O Pat Ternity	• =
vPA Dashboard	Process Progress (Advan	ced Filters Applie	d)								C Re	efresh
virtual Payroll Assistant	Search Search Clear								Status	All +	Sorted: Updated • B	by: 17
. Groups										_		
 Teams Clients 	Client	Process	Group	Frequency	Period Number	Tax Year :	Started	Updated	Assigned Team	Status	Percentage Complete	
Month View	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	FALLID	Q	+
Process Progress	Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	12-Aug-2022 08:30	19-Aug-2022 08:31	Directors	COMPLETED	100	+
 Planned Processes 	Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	RUNNING	29	-
 Planned Steps Logs 	View Steps Process Info Pause Proce	55										
virtual Payroll Admin Admin Settings	Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	EUNNING		•
🖄 Log out	Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	5	2022	16-Aug-2022 17:01	18-Aug-2022 16:06	Office 1	EUNNING	12	+
	Amy's Mobile Hair (AMYSHOMEHAIR MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022	18-Aug-2022	Directors	RUNNING	Ø	

equency: Weekly			Period Number: 21		Tax Year:	2022		
Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status	
Check open run details	Initialise Process			15-Aug-2022 08:31		15-Aug-2022 08:31	COMPLETED	
Calculate	Calculate		19-Aug-2022 08:00	19-Aug-2022 08:00	22-Aug-2022 17:00	19-Aug-2022 08:00	COMPLETED	
Create Full Payment Submission	Create FPS		22-Aug-2022 08:00		24-Aug-2022 17:00		NOT READY	
Submit Full Payment Submission	Send FPS		22-Aug-2022 08:00		24-Aug-2022 17:00		NOT READY	
Close period	Close Run		22-Aug-2022 08:00		25-Aug-2022 17:00		NOT READY	
			22-Aug-2022 08:00		25-Aug-2022 17:00		NOT READY	

Manual task

Click the '+' symbol to expand the row for the manual task:

notices and feeds								
Auto Enrolment - upload feed	Manual Task	Olive Vertime	22-May-2020 08:00	04-Jun-2020 15:21	28-May-2020 17:00	0	VERDUE	1
🗸 Sign Off 🔳 Step Inf	o 🕼 Edit Step							
Close period	Close Run		22-May-2020 08:00		28-May-2020 17:00	0	VERDUE	
Open period	Open Run		22-May-2020 08:00		28-May-2020 17:00	Ø	VERDUE	

Then click the **Sign off** action.

Internal approval

Click the '+' symbol to expand the row for the internal approval:

Calculate payroll	Manual Task	Pat Ternity	26-May-2020 08:00	04-Jun-2020 14:27	27-May-2020 17:00	04-Jun-2020 14:27	COMPLETED	+
Internal approval	Internal Approval	Olive Vertime	26-May-2020 08:00	04-Jun-2020 14:27	27-May-2020 17:00		OVERDUE	-
🔲 Step Info 🕼 Respo	nd 🕼 Edit Step							
Upload review reports to myeRayMindow	Manual Task	Pat Ternity	26-May-2020 08:00		27-May-2020 17:00		OVERDUE	+

Click on the following screen is displayed for you to Approve the payroll so further processing can proceed or **Reject** as changes are required.



If you are approving the step, you must enter a reason, which will then be recorded against the step for future reference, click on **Confirm**.

If you are rejecting the step, you must enter a reason and select a user for the step to be returned to next to Action Required By:

Internal Approval Ste	ep Response		
Set status: O Approved You must enter a reason fo	i 🧿 Rejected r the outcome of this approval step (maximum number of characters - 2	50).	
Response explanation			
Action Required By:		Select User	Clear
		✓ Confirm	1 Back

Once you have entered the reason and selected the user, click on Confirm:



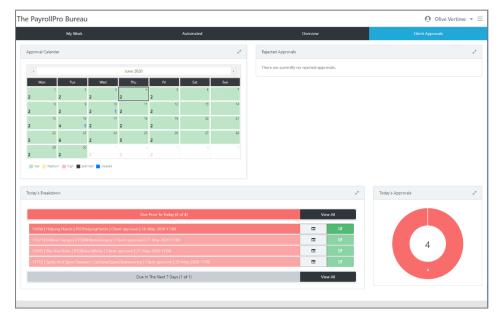
If you reject the internal approval step then the payroll will need to be re-run, see the section **How to rerun** process step(s) for a client.

Responding to client approvals on the client's behalf

If the client hasn't responded to the Client approval step via myePayWindow, and you have received a call from them, or called them to chase for a response, you are able to approve or reject the payroll on the clients behalf.

Via vPA website

To respond to a Client approval via the vPA Dashboard page Client Approvals:



Use the 'Today's Breakdown' chart to respond to the Clients approval. The clients approval can only be responded to if the appropriate button is enabled and will be either blue for Ready, red for Overdue. The tasks shown in grey are Not Ready, they cannot be responded to yet as they are pending (not due to be started based on the schedule and step timing set).

On the row that you want to respond to the Client approval click on _____ in the chart to Approve the payroll so further processing can proceed or Reject as changes are required.

Client Approval Step - Bureau Override
WARNING: Responding to this approval step will complete the corresponding approval step sent to the employer's assigned approver(s) on myePayWindow (if they have not responded already).
Set status: O Approved O Rejected
You must enter a reason for the outcome of this approval step (maximum number of characters - 250).
Response explanation
Please be aware that any comments entered here will be visible to employer users on myePayWindow.
✓ Confirm 2 Back

You must enter a reason, which will then be recorded against the step for future reference and is also displayed against the Clients Approval within myePayWindow, click on **Confirm**.

If you reject the client approval then the payroll will need to be re-run, see the section How to rerun process step(s) for a client.

Via myePayWindow

You can approve or reject the clients approval, login to myePayWindow:

■ The PayrollPr	o Bureau				Pat Ternity -
Bureau Dashboard	JDIC		Notifications	Documents	Clients
Notifications	IRIS		no new messages	no new documents	Show clients
& Approvals	109 Home - Bureau Dashboard				
Clients		mu@Doulllindou			
Statistics		my@PayWindow			
oc Administration		Latest News			
뿔 Privileges		(R) Rayroll Professional Support			
ප Logout		Our latest Practical Guide to Covid in IRIS Payroll Professional is available now downloads.star-payroll.com/documentation/ ♥ (************************************			
	©2020 Galaxy Payroll. All rights reserved.	Madula			

In the left-menu select Clients:

Bureau Dashboard		IDIC			Notifications	to S Clients
Notifications		IRIS			no new measages no new d	Scumonts Show clients
	(Se Home > 0	Clients Listing				
Clients	Clients	You have 25 Client(s)				
Statistics	🖽 Clients -	Your current Clients				🚨 Download datagrid
& Administration	Search:	Go Reset				
Privileges	0	Name	No Employees	Contact	PhoneNumber	
b Logout	0	Bits And Bobs	7	Bob Bits		+
	0	Brides And Grooms	6			+
	0	Carpets Galore	28			+
	0	🛄 Cherry Cafe	14			+
	0	Country Homes	14			+
	0	Crunchy Accountants	45			+
	0	📃 Denzel's Garage	33			+
	0	🛄 Duke Solicitors	37			+
	0	📜 Fighting Fit Gym	14			+
	0	📜 Helping Hands	65			+
	Showing rec	ord: 1 to 10 from 25 item(s)				1 2 3



- 1	IRIS			Notifications Documents no new documents	Clients Show clients
Home > C	lients Listing				
Clients	You have 25 Client(s)				
Clients - Yo	sur current Clients				1 Download datagrid
Search:	Go Reset				
	Name	No Employees	Contact	PhoneNumber	
0	関 Bits And Bobs	7	Bob Bits		-
Emoloveer	e Pavalios Administration Privileges Statistics				
	E Brides And Grooms	6			+
	Carpets Galore	28			+
0	Cherry Cafe	14			+

Under actions select Administration:

	IRIS				no no	ew messages	no new documents	Show clients
Home > C	lients Listing > Admini	stration for Bits And Bobs						
dminis	stration	s portal settings						-
								Emp
삼 Users	🛛 Details 🔛 Bran	fing 🔹 Employee Dashboa	rd 🔠 Payslip 8	& CIS Settings				
曾Users 田 Users	💭 Details 🔛 Bran	ding 📲 Employee Dashboa	rd I≣ Payslip 8	LCIS Settings				
I Users	💭 Detaës 🛛 🚔 Bran	Sing Employee Dashboa	rd ≣ Payslip 8	t CIS Settings				
	Dotaits Bran			k CIS Settings Status	Last Login		Last Invi	10

Click on '+' symbol to expand the row for the user:

IRIS					Clients Show clients
Home > Clients Listing > Administra	tion for Bits And Bobs				
Administration various po	tal settings				Employe
ter Users ☐ Details ≩ Branding	Employee Dashboard E	E Payslip & CIS Settings			
FirstName	LastName	▲ Status	Last Login	Last Invite	
D Bob	Bits	AGTIVATED	Fri 22/05/2020	Fri 22/05/2020 12:53	-
	3 O A rovals <u>Mysettings</u> <u>Deactival</u>	a & &	8 Delete user		

Under actions click on Approvals:

Home Clients Listing	Users Listing for Bits And Bobs > App	rovals Listing for Bob Bits				
oprovals Vou ha						
Approvals - Your current App						
earch	Go Reset					
Title	Туре	Due (days)	Status 🔺	Signed on	Signed by	
Client approval	vPA Approval	Wed 03/06/2020 17:00	Pending - Overdue			+
Client approval	vPA Approval	Wed 20/05/2020 17:00	Expired - Passed	Fri 22/05/2020 14 34	Pat Ternity	+
- orent opprover	vPA Approval	Wed 27/05/2020 17:00	Expired - Passed	Tue 09/06/2020 10:49	System Account	+
Client approval	VPA Approval					

Click on '+' symbol to expand the row for the Client approval that you need to sign off on the clients behalf:

	Users Listing for Bits And Bobs > App	rovals Listing for Bob Bits				
oprovals ^{You hav}	w 3 Approval(s)					
Approvals - Your current App	rovula					
arch	Go Reset					
litte	Туре	Due (days)	Status 🔦	Signed on	Signed by	
Client approval	vPA Approval	Wed 03/06/2020 17:00	Pending Overdue			-
Approve Reject						
Client approval	vPA Approval	Wed 20/05/2020 17:00	Expired - Passed	Fri 22/05/2020 14:34	Pat Ternity	+
Client approval	vPA Approval	Wed 27/05/2020 17:00	Expired - Passed	Tue 09/06/2020 10:49	System Account	+
howing record: 1 to 3 from 3 it	and al					

Click on Approve or Reject, based on the client's response:

Approve task?		×
Are you sure you want to approve 'Client approval'? This action cannot be undone.		
Comment:		
	Approve S No	

Enter a comment, note this will be visible to the employer user, then click on **Approve**:

Approve task?	2
Are you sure you want to approve 'Client approval'? This action cannot be undone.	
Comment:	
Mr Bobs called and is happy with the payroll, we can proceed to finalise the payroll,	
Mr Bobs called and is happy with the payroll, we can proceed to finalise the payroll.	

The status, signed on and signed by information will be updated, this information will then be updated automatically in the vPA Website (every 30 mins).

oprovals Vou ha		pprovals Listing for Bob Bits				
Approvals - Your current App						
earch:	Go Reset					
Title	Туре	Due (days)	Status 🔺	Signed on	Signed by	
Client approval	vPAApproval	Wed 20/05/2020 17:00	Expired – Passed	Fri 22/05/2020 14:34	Pat Ternity	+
Client approval	vPAApproval	Wed 27/05/2020 17:00	Expired – Passed	Tue 09/06/2020 10:49	System Account	+
Client approval	vPAApproval	Wed 03/06/2020 17:00	Approved by Bureau	Tue 09/06/2020 13:36	Pat Ternity	-
Show comment						

You can click on **Show comment** to see the details entered for each Client approval:

Comment added by Pat Ternity	×
Mr Bobs called and is happy with the payroll, we can proceed to finalise the payr	oll.
I	S Cancel

vPA Version and Updates

Whilst in the vPA website select the burger icon on the right and click on the Information icon, you will then see the following screen that includes the version numbers of the components of vPA:

				$oldsymbol{\Theta}$ Pat Ternity $ ullsymbol{\cdot} \equiv $
0	٢	í	P	
Com	ponent	Version	Numbers	2 Refresh
SPA Curre	ent: 2.3.1	16.0		vPA Resource Server Current: 2.3.17.0
	cheduling ent: 2.3.9			Payroll Resource Server Current: 2.3.11.0
Curre	uto Upda ent: 2.3.9	5.0	0	
Last C	heck:			
We	ed, Jan 1	9, 2022	11:18 AM	
Next	Check:			
Tu	e, Jan 29	5, 2022 1	10:00 AM	Save X Cancel
Viev	w Last Up	date Log		

vPA is scheduled to automatically check for updates available on our FTP site <u>ftp://downloads.star-payroll.com/vPA</u> every Tuesday at 10am

If there is an update, a backup will automatically be taken of the central data base T2DATA and then the update is installed.

Part of the update process, vPA will ensure that any automated steps currently in progress are completed before the back up of the T2DATA and update is performed.

If any part of the update fails, then vPA will automatically roll back to the previous version, so that you can continue using vPA, this includes the T2DATA.

The View Last Update Log button shows the details of the last update, whether it was su	ccessful or where the
update failed:	

Update Log
UPDATE
START 26-Nov-2020: 15:19:33
Database
vPA_Engine
vPA_API
Payroll_API
vPA_SPA
UPDATE FINISHED 26-Nov-2020: 15:21:56

Click on a row to expand the details.

Schedule checking for an update

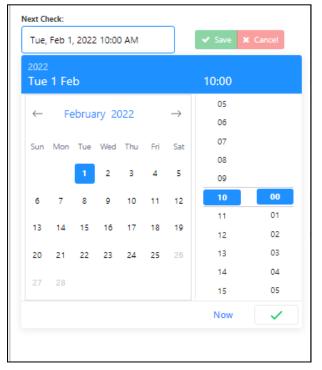
A user with the role Payroll Department Admin can schedule to check for an update now or at a specific date and time.

Whilst in vPA website click on the burger icon in the top right-hand corner of the page:



Then select the information icon, which will then show the page with the versions:

			$oldsymbol{\Theta}$ Pat Ternity $ {ullstress} \equiv $
0	(i)	Φ	
Compone	nt Version	Numbers	2 Refresh
SPA Current: 2	.3.16.0		vPA Resource Server Current: 2.3.17.0
vPA Schedu Current: 2			Payroll Resource Server Current: 2.3.11.0
vPA Auto U Current: 2 Check For		0	
Last Check:			
Tue, Jar	25, 2022	10:00 AM	
Next Check	:		
Tue, Fel	o 1, 2022 1	0:00 AM	Save X Cancel
View Last	Update Log		



Click on the date and time shown within the **Next Check** box:

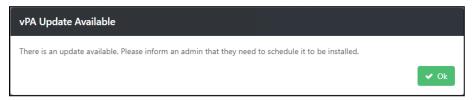
Click on Now or select a specific date and time, once selected click Save:

Next Check:	_
Thu, Jan 27, 2022 1:31 PM	Save X Cancel
View Last Update Log	

vPA will check for any available updates at the date and time specified.

Update available and scheduling installation

When users with the roles Supervisor or Operator, login to vPA website and an update is available they will be shown the following message informing them an update is available.



When users with the role Payroll Department Admin logs into the vPA website, and an update is available, the user will be shown the following message informing them an update is available. This message includes the ability to schedule the update:

vPA Update Available
There is an update available. Please schedule it to be installed.
The update installation will stop the vPA services, so it is advised that you schedule it to happen outside of normal working hours. The services will automatically restart when the update is complete.
Install Not Scheduled
Save Save Remind Me Later

Click in the box Install Not Scheduled, you will then be shown a calendar to select Now or a specified date and time:

,	VPA L	Jpda	te A	vaila	ble					
	There i	is an u	pdate	e avail	able. F	lease	sched	lule it to be ins	talled.	
										at you schedule it to happen outside of normal working
	nours.	The se	ervice	s will a	autom	atical	ly resta	art when the u	pdate is cor	npiete.
	Insta	all Not	Sche	duled						
	2022									
										✓ Save Ø Remind Me Later
	~	J	anua	iry 20)22		\rightarrow			
	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
							1			
хN	2	3	4	5	6	7	8			7:00
χŇ								00	00	17:00
	9	10	11	12	13	14	15	01	01	
	16	17	18	19	20	21	22	02	02 03	
	23	24	25	26	27	28	29	04	04))
	20							05	05	
	30	31						06	06	
								Now	✓	

Once you have selected the date and time, click Save:

vPA Update Available	
There is an update available. Please schedule it to be installed.	
The update installation will stop the vPA services, so it is advised that you schedule it hours. The services will automatically restart when the update is complete.	to happen outside of normal working
Thu, Jan 27, 2022 2:04 PM	×
	Save O Remind Me Later

Alternatively, you can select **Remind Me Later** without scheduling the installation of the update.

The user with the role Payroll Department Admin can schedule the installation of the update via the burger icon and selecting the information icon:

0 🕸 🛈	φ	
Component Version	Numbers	2 Refresh
SPA		vPA Resource Server
Current: 2.3.16.0		Current: 2.3.17.0
Update Available: 2.4	.1.0	Update Available: 2.4.0.0
vPA Scheduling Engine		Payroll Resource Server
Current: 2.3.9.0		Current: 2.4.3.0
Update Available: 2.4	.0.0	Update Available: 2.4.7.0
vPA Auto Updater		
Current: 2.3.5.0		
Update Available: 2.4	.0.0	
Check For Updates	0	
Last Check:		
Thu, Jan 27, 2022 2	:02 PM	
Next Check:		
Tue, Feb 1, 2022 10	0:00 AM	Save K Cancel
Install Updates 🚯		
Next Update:		
Install Not Schedul	ed	Save X Cancel
View Last Update Log		

2022								
\leftarrow	January 2022				\rightarrow			
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
						1		
2	3	4	5	6	7	8	00	00
9	10	11	12	13	14	15	01	01
16	17	18	19	20	21	22	02	02
10	17	10	15	20	21	22	03	03
23	24	25	26	27	28	29	04	04
30	31						05	05
							06	06
							Now	\checkmark
Insta	all Not	Sche	duled				🗸 Save 🗙	Cancel
/iew	Last Up	date l	.og					

Click on the date and time shown within the **Next Update** box:

Click on **Now** or select a specific date and time, once selected click **Save**:

stall Updates 🚯	
ext Update:	
Mon, Jan 31, 2022 2:13 PM	✓ Save 🗙 Cancel

Once a Payroll Department Admin has scheduled the installation of the update, vPA will then install the update automatically at the specified date and time.

After the update is installed, when users log into the vPA website, if required, the user will be prompted to refresh the page by selecting F5.

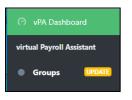
Update Process

After installing an update, when there are step changes to templates, for example, the automated step called Empty outbox for the four best practice templates, you **must** review and choose whether to accept the changes for the Process attached to each Group.

Only users with the role vPA Admin can perform the Process Update.

Update Process Required

Groups on the left menu will show an **Update** flag, to inform the user when an update to the process is required, for active processes attached to groups:



The **Groups** grid will highlight any Groups with an active Process that requires an Update Process, by showing them in bold with a black round dot to the left of the Group name:

earch Search Clear						Status: Enabled -	Sorted: Name -	By:
earch Clear						status: Enabled *	sorted: Name*	by:
łame i	Frequency :	Period Number	Tax Year :	Pay Day/Date	Region :	Assigned Team :	Status	
Monthly - Changes - End of Month	Monthly	3	2022	31	England	Office 1	ENABLED	
Monthly - Changes - Middle of Month	Monthly	3	2022	15	Wales	Office 2	ENABLED	
Monthly - No Changes	Monthly	3	2022	28	Scotland	Office 1	ENABLED	
Weekly - Changes	Weekly	7	2022	Wednesday	Northern Ireland	Office 2	ENABLED	
Weekly - Directors	Weekly	14	2022	Monday	England	Directors	ENABLED	
Weekly - Friday	Weekly	7	2022	Friday	Wales	Office 2	ENABLED	
Weekly - No Changes	Weekly	7	2022	Wednesday	England	Office 2	ENABLED	
Weekly - Thursday	Weekly	8	2022	Thursday	England	Office 1	ENABLED	
						Shi	owing record 1 to 8	of 8

Expand the group by clicking on the + sign:

Groups (Advanced Filters Applied)						•	New Group	Refresh
Search Search Clear						Status: Enabled *	Sorted: Name =	By: 11
Name	Frequency :	Period Number	Tax Year 🔅	Pay Day/Date	Region 1	Assigned Team	Status :	
Monthly - Changes - End of Month	Monthly	3	2022	31	England	Office 1	INABLED	-
C 🗙 📭 C Edit Delete Disable Update Process								
Monthly - Changes - Middle of Month	Monthly		2022		Wales	Office 2		

Click on the action Update Process.

Update Process Screen

mplate Name:	Process Payroll - Mon	thly	Template Modified Date:	26-Feb-2021 13	:57		
New & Updated	\$	Number of reviewed changes	s: 0/8				
Upload payslips a	and P45s to myePayWinc	Property Name	Current Value		New Value	Apply Change	Change Details
		Name	Upload payslips and P45s to mye	PayWindow	Upload to myePayWindow	NO	0
		Branch Changes	0			NO	0
		Cost Centre Changes	0			NO	0
		Department Changes	•			NO	0
		Employee Changes	•			YES	0
		Employee Anonymisation	•			YES	0
		P45s	0			YES	0
		Documents				NO	8

The top of the screen will show the **Template name** which is one of the four best practice process templates used when creating the Group or adding a Process to a Group, and the template's last modified date.

Number of reviewed changes shows the number of changes that have been reviewed and that need to be reviewed.

The left side of the screen shows the step changed, for the highlighted step the right side shows changes to the current value and the new value. There is a Yes/No button for you to choose whether to apply the step change or not, this defaults to Yes. To accept the change(s) click on Confirm, this updates the Number of reviewed changes.

For each change to the highlighted step, you can view more details by placing your cursor over the information icon under the column Change Details:

Name:	Process Payroll - Mor	nthiy	Template Modified Date:	Template Modified Date: 26-Feb-2021 13:57			
pdated	٥	Number of reviewed change	s: 0/8				
ad payslips an	d P45s to myePayWinc	Property Name	Current Value		New Value	Apply Change	Change Details
		Name	Upload payslips and P45s to my	ePayWindow	Upload to myePayWindow	YES	0
		Branch Changes				YES	Setting Branche automatically t
		Cost Centre Changes	•			YES	0
		Department Changes				YES	0
		Employee Changes				YES	θ
		Employee Anonymisation				YES	θ
		P45s				YES	Θ
		Documents	0			YES	0

If you change any of the step settings after confirming, you will need to reselect **Confirm**.

You can change from New & Updated to All above the step description, to see all the steps in the Process attached to the Group:

mplate Name:	Process Payroll - Mont	hly	Template Modified Date:	26-Feb-2021 1	3:57			
A.II	Number of reviewed changes:		:: 0/8)/8				
Upload review reports	s to myePayWindow	Property Name	Current Value		New Value	Apply Change	Change Details	
Client approval		Name	Upload payslips and P45s to my	PayWindow	Upload to myePayWindow	YES	0	
Pay employees - submit payment files Upload final reports to myePayWindow	Branch Changes	•			YES	0		
Create Full Payment S Submit Full Payment !		Cost Centre Changes	0			YES	0	
	nd P45s to myePayW	Department Changes	•			YES	0	
Empty myePayWindo Auto Enrolment - gen	w Outbox	Employee Changes				YES	0	
		Employee Anonymisation				YES	0	
		P45s				YES	0	
		Documents				YES	6	

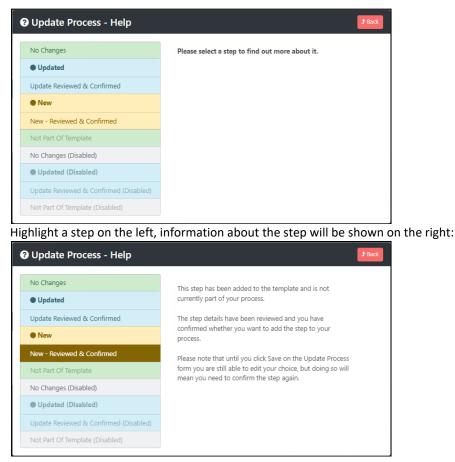
The steps shown in pale green are existing steps without any changes, the step with changes show with a dot to the left of the step description.

Once you have confirmed all changes, click on **Save**. Save will only be available when all changes have been reviewed, see the **Number of reviewed changes**.

Help

emplate Name:	Process Payroll - Mon	thly	Template Modified Date: 26	6-Feb-2021 13:57	7				
New & Updated \$		Number of reviewed changes: 0/8							
Upload payslips a	and P45s to myePayWinc	Property Name	Current Value		New Value	Apply Change	Change Details		
		Name	Upload payslips and P45s to myePay	Window	Upload to myePayWindow	NO	0		
		Branch Changes	•			NO	θ		
		Cost Centre Changes	•		V	NO	θ		
		Department Changes				NO	θ		
		Employee Changes				YES	θ		
		Employee Anonymisation				YES	0		
		P45s				YES	0		
		Documents				NO	0		

On the **Update Process** form in the top right-hand corner there is a **Help** button that opens the following form, to guide you through the step display:



Update Process

Only users with the role Payroll Department Admin can perform the Update Process.

After clicking on **Update Process**, the following screen will appear:

C Update Process	- Monthly - Char	nges - End of Month (Monthly - Changes - Er	nd of Month)	e Help	Save J Discard		
he template that this proce	ess was originally copied fr	om has been updated. Please rev	iew the changes below and confirm	whether you wan	t to apply the updates to your pro	ocess.			
emplate Name:	Process Payroll - Mont	hly	Template Modified Date:	26-Feb-2021 13	3:57				
New & Updated	¢	Number of reviewed changes	: 0/8	8					
Upload payslips and P45s to myePayWinc		Property Name	Current Value		New Value	Apply Change	Change Details		
		Name	Upload payslips and P45s to my	ePayWindow	Upload to myePayWindow	YES	0		
		Branch Changes				YES	0		
		Cost Centre Changes				YES	0		
		Department Changes				YES	0		
		Employee Changes	•			YES	0		
		Employee Anonymisation	0		V	YES	0		
		P45s	0			YES	0		
		Documents	0			YES	θ		
							Confirm		

Under the **Apply change** column click on the **Yes/No** button for each change to choose which of them you want to apply.

Once you have made you selections click on Confirm, then Save.

Update Process – Process Payroll – Director only

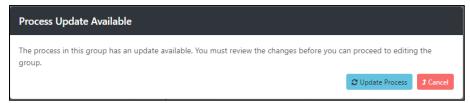
After you click on **Update Process**, if you have already enabled the additional outbox items for the step Empty outbox, you will see the following screen when you click on **Update Process**:

C Update Process - Weekly - Directors (Weekly - Directors)	Help	✓ Save	J Discard
All template changes have already been applied. Click Save to continue.			

Click on Save.

Edit a Group - Update Process Required

If you Edit a Group that requires an Update Process the following message will appear:



You will need to click on Update Process and complete the steps before you are able to Edit the group.

Enabling Disabled Group – Update Process Required

Group grid

If a disabled group has an enabled process with an update process that has not been reviewed, if you enable the Group using the Action when you expand the row on the Groups grid, a prompt appears advising that the Group can't be enabled until the available Process Update has been reviewed. If you want to continue to enable the group, click on Update Process, otherwise click on Cancel and the group will stay disabled.

After you have performed Update Process, a prompt will appear asking whether you still want to enable the Group, select Enable group if you want to enable the group, otherwise select Cancel then the group will remain disabled.

Group Edit form

If a disabled group has an enabled process with an Update Process that has not been reviewed, if you try to enable the Group using the Status field on the Group Details of the Edit Group form, the Group Status field will be readonly, place your cursor over the Status and a tooltip will be displayed explaining why you are unable to enable the group.

Under the Process tab select Update to open the Update Process form, once you have completed the Update Process you will be able to enable the Group.

Update Process Status

Once a Process is up to date where you have applied all the changes for a Group, none of the flags, tabs or actions relating to Update Process are displayed.

If you only accept some or none of the Update Process changes for a Group:

- Group grid the row for the Group will not be shown in bold with an icon, highlighting there is a process update.
- Group grid the actions under the expanded row for the Group will include Process Update to allow you to apply the changes later.
- Under Edit Group\Process the Update tab will be available to apply additional changes later.
- You can Enable a Disabled Process.
- You can Enabled a Disabled Group.

If you Cancel the Update Process:

- Group grid the row for the Group will continue to be shown in bold with an icon, highlighting there is a process update (Group enabled with Process enabled).
- Group grid the actions under the expanded row for the Group will include Process Update to allow you to apply the changes later.
- Under Edit Group\Process the Update tab will be available to apply additional changes later.
- If the Process is Disabled, you cannot Enable the Process until the Process Update has been applied.
- If the Group is Disabled, you cannot Enable the Group until the Process Update has been applied.
- If the Process for a Disabled Group is Enabled, to enable to Group you must Update the Process first.
- If the Process for a Disabled Group is Enabled, you can Edit the Group without Updating the Process.

Enable Disabled Process – Process Update Required

If a disabled process has an available update that has not been reviewed, the Process Status field is read-only and displays a tooltip explaining why it is disabled.

If a disabled process has had an update reviewed where at least one change was not taken, the Update Process button will still be available, you are able to enable the Process.

Automated step - Create next process

An additional check has been added to this step, if there is an Update Process available that has not been reviewed for the Group that the Client is attached to, this step will Fail:

bin Electrician	- Weekly - [General Details	Properties			C Refresh	Actions - 10
quency: Weekh	/	Step Name:	Create next process				
Step Name	Job Type	Job Type:	Create Next Process			pleted	Status
Check open run details	Initialise Proce	Job ID:	1bb94d0b-3f9e-4742-a6f8-	eceff0ee28a9		lun-2022 08:31	COMPLETED
	Calculate	Status:	Failed			lun-2022 08:00	COMPLETED
	Create FPS	Error:	Please Review The Available	e Process Update		lun-2022 08:00	COMPLETED
	Send FPS		27-Jun-2022 08:00	27-Jun-2022 08:00	29-Jun-2022 17:00	27-Jun-2022 08:30	COMPLETED
							COMPLETED
							COMPLETED
ireate next process	Create Next Pro	cess	27-Jun-2022 08:00	27-Jun-2022 08:31	30-Jun-2022 17:00	27-Jun-2022 08:31	FAILED

You will need to perform the Update Process and then once complete, re-run the Create Next Process step.

Process Update and User Roles

Only a Payroll Department Admin can perform the Process Update to implement the changes.

When a Payroll Department Admin is logged into vPA and an Update Process is available:

• Within the Group Edit form under the Process tab the Update tab is available:

요 Edit Group - Mor	nthly - Cha	nges - End of N	Nonth					Client Process Override Save J Close				
Group Details	+	Enabled	\$	Process	Steps	Schedule	Update	Re				
Process	Monthly	- Changes - End of	*					ess was originally copied from has been updated. You can review the changes and confirm whether you				
Clients			cess using the button below.									
	-			C Upd	late Process							

• **Groups** menu indicates **Update** is available if there are Groups requiring an update.

When a **Supervisor** is logged into vPA and an Update Process is available:

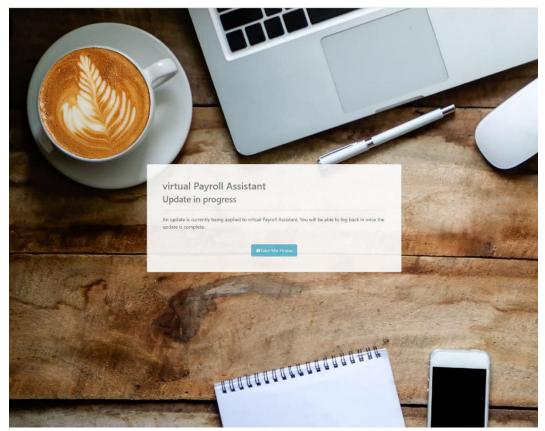
- Within the Group Edit form under the Process tab the Update tab is hidden.
- **Groups** menu indicates **Update** is available if Groups requiring an update.

When an **Operator** is logged into vPA and an Update Process is available:

- **Groups** menu indicates **Update** is available if Groups requiring an update are assigned to a Team that the operator is part of, or the Group does not have a Team assigned.
- Within the Group Edit form under the Process tab the Update tab is hidden.

Website

When a user tries to login to the vPA website when an update is being installed the following screen will be displayed.



Once the update is complete, click on Take Me Home and login as normal.

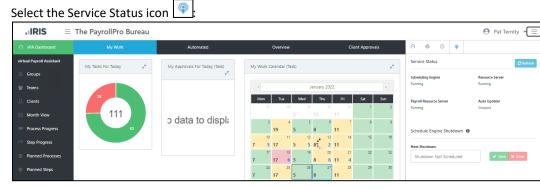
Server restart – Schedule Engine Shutdown

You can schedule when you need to shutdown vPA to perform maintenance on the server that vPA resides, such as the server needing to be restarted or program updates to be installed etc. Using This will cleanly shutdown vPA and ensure any process steps currently running are completed before vPA is shutdown, to ensure payrolls are left in the correct state. If any process steps are running when you shut down using an alternative method, this can leave the payroll data files in an incorrect state. An example is the automated step Calculations, shutting vPA down midway through this process will leave incorrect data and likely corruptions.

Only users with the role Payroll Department Admin can set up the Schedule Engine Shutdown.

Whilst in the vPA website click on the burger icon top right-hand corner:

.IRIS ≡	The PayrollPro Bureau						\rm e Pat Tern	ity 🛛 📃
vPA Dashboard	My Work		Automated		Overview		Client Approvals	
virtual Payroll Assistant	My Tasks For Today	2	My Approvals For Today (Task)	2	My Work Calendar (Task)			2
B Groups Teams					¢	January 2022		>
. Clients	28				Mon Tue Wed	Thu Fri	Sat S	iun



Under Next Shutdown click into the box Shutdown Not Scheduled:

Shut	down	Not 9	Schedu	uled			🗸 Save 🗙	Clear
022								
•								
\leftarrow	J	anua	ry 20)22		\rightarrow		
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
						1		
2	з	4	5	6	7	8	00	00
9	10	11	12	13	14	15	01	01
16	17	18	19	20	21	22	02	02
				_			03	03
23	24	25	26	27	28	29	04	04
30	31						05	05
							06	06

Select the date and time to schedule the shutdown:

Schedule Engine Shutdown ()	
Next Shutdown: Mon, Jan 31, 2022 3:27 PM	✓ Save X Clear

Click Save.

When the scheduled date and time is reached, vPA will shut down as soon as the current process step is complete, so this may be after the server restart time scheduled depending on how long it takes to complete the step.

Appendix A – Best practice process templates

Process Payroll – Director only

Step Description	Manual/ Automatic	Јоb Туре	Notes	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Check open run details	Automatic	Initialise Process	Ensuring the data file is in the correct period and tax year for the frequency	NA	NA	NA	NA
DPS Notifications count check	Automatic	DPS Check	Will check whether any notices are available since the last successful download. If there are notices available will move to the Download notifications – DPS step, otherwise will move to the Download AE opt out step	-2	17.00	1	8.00
Download DPS Notifications	Manual	Manual Task		-2	17.00	1	8.00
Calculate	Automatic	Calculate		-2	17.00	1	8.00
Upload review reports to myePayWindow	Manual	Manual Task		-2	17.00	1	8.00
Create Full Payment Submission	Automatic	Create FPS	If it is determined it is the last period of the tax year and the data file only has one frequency (checks employees and payroll runs for the current tax year), then the Final Submission flag is included in the FPS.	0	17.00	2	8.00
Submit Full Payment Submission	Automatic	Send FPS		0	17.00	2	8.00
Create Report and Add To Outbox	Automatic	Create Report	Creates a PDF of the reports: PARUN6\PSRUN6 PARUNT3\PSRUNT3 PAPEN1\PSPEN1 PARUNT5\PSRUNT5 Adds them to myePayWindow outbox assigned to the Default contact set up in myePayWindow	0	17.00	2	8.00
Upload to myePayWindow	Automatic	Empty Outbox	Set to upload Payslips, Documents, Branches, Cost Centres, Departments, Anonymise Employee, Employee Changes and P45s. If there are other items in the outbox other than those selected to be uploaded, then they will not be uploaded and will move to the step Empty myePayWindow Outbox step otherwise will move to the Close Period step.	0	17.00	2	8.00
Empty myePayWindow Outbox	Manual	Manual Task					
Close Period	Automatic	Close Run	Will also determine whether it is the last period of the tax year based on frequency and pay day selected in vPA for each client, if it is then will automatically add a manual step for Close year.	+1	17.00	3	8.00

Step Description	Manual/ Automatic	Job Type	Notes	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Open Period	Automatic	Open Run	Where the clients process setting called Pay Day Setting is selected as Default or Specific Day, this step will set the pay date for the period in the payroll data file as the date set in vPA.	+1	17.00	3	8.00
Create Next Process	Automatic	Create next process		+1	17.00	3	8.00

Process Payroll – Monthly

Step Description	Manual/ Automatic	Job Type	Additional Information	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Check open run details	Automatic	Initialise Process	Ensuring the data file is in the correct period and tax year for the frequency	NA	NA	NA	NA
Client info received - Ready to process	Manual	Manual Task		-6	17.00	1	8.00
DPS Notifications Count Check	Automatic	DPS Check	Will check whether any notices are available since the last successful download. If there are notices available will move to the Download DPS Notifications step, otherwise will move to the Download AE opt out step	-6	17.00	1	8.00
Download DPS Notifications	Manual	Manual Task		-6	17.00	1	8.00
Download AE opt outs	Manual	Manual Task		-6	17.00	1	8.00
Enter data	Manual	Manual Task		-4	17.00	2	8.00
Calculate payroll	Manual	Manual Task		-4	17.00	2	8.00
Internal approval	Internal Approval	Internal Approval		-4	17.00	2	8.00
Upload review reports to myePayWindow	Manual	Manual Task		-4	17.00	1	8.00
Client approval	Client Approval	Client Approval	Uploaded to myePayWindow	-3	17.00	2	8.00
Pay employees – submit payment files	Manual	Manual Task		-2	17.00	1	8.00
Upload final reports to myePayWindow	Manual	Manual Task		0	17.00	3	8.00
Create Full Payment Submission	Manual	Manual Task		0	17.00	3	8.00
Submit Full Payment Submission	Automatic	Send FPS		0	17.00	3	8.00

Step Description	Manual/ Automatic	Job Type	Additional Information	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Upload to myePayWindow	Automatic	Empty Outbox	Set to upload Payslips, Documents, Branches, Cost Centres, Departments, Anonymise Employee, Employee Changes and P45s. If there are other items in the outbox other than those selected to be uploaded, then they will not be uploaded and will move to the step Empty myePayWindow Outbox step otherwise will move to the Auto Enrolment – Generate Notices and Feeds step.	0	17.00	3	8.00
Empty myePayWindow Outbox	Manual	Manual Task		0	17.00	3	8.00
Auto Enrolment – Generate Notices and Feeds	Manual	Manual Task		+5	17.00	8	8.00
Auto Enrolment – Upload Feed	Manual	Manual Task		+5	17.00	8	8.00
Close Period	Manual	Manual Task		+5	17.00	5	8.00
Open Period	Automatic	Open Run	Where the clients process setting called Pay Day Setting is selected as Default or Specific Day, this step will set the pay date for the period in the payroll data file as the date set in vPA.	+6	17.00	6	8.00
Create Next Process	Automatic	Create next process		+6	17.00	6	8.00

Process Payroll – Weekly

Step Description	Manual/ Automatic	Јоb Туре	Additional Information	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Check open run details	Automatic	Initialise Process	Ensuring the data file is in the correct period and tax year for the frequency	NA	NA	NA	NA
Client info received - Ready to process	Manual	Manual Task		-2	17.00	1	8.00
DPS Notifications Count Check	Automatic	DPS Check	Will check whether any notices are available since the last successful download. If there are notices available will move to the Download DPS Notifications step, otherwise will move to the Download AE opt out step	-2	17.00	1	8.00
Download DPS Notifications	Manual	Manual Task		-2	17.00	1	8.00
Download AE opt outs	Manual	Manual Task		-2	17.00	1	8.00
Enter data	Manual	Manual Task		-2	17.00	1	8.00
Calculate payroll	Manual	Manual Task		-2	17.00	1	8.00
Internal approval	Internal Approval	Internal Approval		-2	17.00	1	8.00
Upload review reports to myePayWindow	Manual	Manual Task		-2	17.00	1	8.00
Client approval	Client Approval	Client Approval	Uploaded to myePayWindow	-2	17.00	1	8.00
Pay employees – submit payment files	Manual	Manual Task		-2	17.00	0	8.00
Upload final reports to myePayWindow	Manual	Manual Task		0	17.00	2	8.00
Create Full Payment Submission	Manual	Manual Task		0	17.00	2	8.00
Submit Full Payment Submission	Automatic	Send FPS		0	17.00	2	8.00

Step Description	Manual/ Automatic	Job Type	Additional Information	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Upload to myePayWindow	Automatic	Empty Outbox	Set to upload Payslips, Documents, Branches, Cost Centres, Departments, Anonymise Employee, Employee Changes and P45s. If there are other items in the outbox other than those selected to be uploaded, then they will not be uploaded and will move to the step Empty myePayWindow Outbox step otherwise will move to the Auto Enrolment – Generate Notices and Feeds step.	0	17.00	2	8.00
Empty myePayWindow Outbox	Manual	Manual Task		0	17.00	2	8.00
Auto Enrolment – Generate Notices and Feeds	Manual	Manual Task		+1	17.00	3	8.00
Auto Enrolment – Upload Feed	Manual	Manual Task		+1	17.00	3	8.00
Close Period	Manual	Manual Task		+1	17.00	3	8.00
Open Period	Automatic	Open Run	Where the clients process setting called Pay Day Setting is selected as Default or Specific Day, this step will set the pay date for the period in the payroll data file as the date set in vPA.	+1	17.00	3	8.00
Create Next Process	Automatic	Create next process		+1	17.00	3	8.00

Process Payroll – Four Weekly

Step Description	Manual/ Automatic	Јор Туре	Additional Information	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Check open run details	Automatic	Initialise Process	Ensuring the data file is in the correct period and tax year for the frequency	NA	NA	NA	NA
Client info received - Ready to process	Manual	Manual Task		-5	17.00	1	8.00
DPS Notifications Count Check	Automatic	DPS Check	Will check whether any notices are available since the last successful download. If there are notices available will move to the Download DPS Notifications step, otherwise will move to the Download AE opt out step	-5	17.00	1	8.00
Download DPS Notifications	Manual	Manual Task		-5	17.00	1	8.00
Download AE opt outs	Manual	Manual Task		-5	17.00	1	8.00
Enter data	Manual	Manual Task		-3	17.00	2	8.00
Calculate payroll	Manual	Manual Task		-3	17.00	2	8.00
Internal approval	Internal Approval	Internal Approval		-3	17.00	2	8.00
Upload review reports to myePayWindow	Manual	Manual Task		-3	17.00	2	8.00
Client approval	Client Approval	Client Approval	Uploaded to myePayWindow	-3	17.00	2	8.00
Pay employees – submit payment files	Manual	Manual Task		-2	17.00	1	8.00
Upload final reports to myePayWindow	Manual	Manual Task		0	17.00	3	8.00
Create Full Payment Submission	Manual	Manual Task		0	17.00	3	8.00
Submit Full Payment Submission	Automatic	Send FPS		0	17.00	3	8.00

Step Description	Manual/ Automatic	Јоb Туре	Additional Information	Due By (x days before, on or after pay day)	Due Time	Start Day (x days before Due By)	Start Time
Upload to myePayWindow	Automatic	Empty Outbox	Set to upload Payslips, Documents, Branches, Cost Centres, Departments, Anonymise Employee, Employee Changes and P45s. If there are other items in the outbox other than those selected to be uploaded, then they will not be uploaded and will move to the step Empty myePayWindow Outbox step otherwise will move to the Auto Enrolment – Generate Notices and Feeds step.	0	17.00	3	8.00
Empty myePayWindow Outbox	Manual	Manual Task		0	17.00	3	8.00
Auto Enrolment – Generate Notices and Feeds	Manual	Manual Task		+4	17.00	5	8.00
Auto Enrolment – Upload Feed	Manual	Manual Task		+4	17.00	5	8.00
Close Period	Manual	Manual Task		+5	17.00	5	8.00
Open Period	Automatic	Open Run	Where the clients process setting called Pay Day Setting is selected as Default or Specific Day, this step will set the pay date for the period in the payroll data file as the date set in vPA.	+5	17.00	5	8.00
Create Next Process	Automatic	Create next process		+5	17.00	5	8.00

Appendix B – Unsupported Elements

Automated Step – Calculate

For the Calculate step we only support basic calculations for:

- Gross to Net
- Tax
- National Insurance

Employees who are already calculated are excluded from these checks.

The following checks are performed to ensure it is not used for more than it is designed for:

- Additional NI Periods
- Attachment of Earnings
- Auto enrolment
- Backdate NIC
- Benefit in Kind Cars
- Expat settings EPM6 Override, Er NI Exempt, Tax Exempt %age
- Foreign Tax Credits
- Gross to net calculations Employer pays employees NICs
- Holiday Schemes
- Negative Net Pay
- Pay component types Termination and Sporting, Flexible drawdown, Pension Death benefit, Serious ill health, Pension Stand Alone Lump Sum and Pension Commencement Excess Lump Sum, Pension (General) and Pension (Disability), Trivial Commutation
- Pay components marked as Benefits in Kind, Gross up, Reducing balance
- Pay spines
- Payment After Leaving/Death
- Pensions Banded, Non banded
- Prior Period Adjustment
- Round Net Pay
- Split Net Pay
- Standard Holiday pay
- Statutory Absence
- Student and Postgraduate Loans
- Sub contractors
- Tax advance

Automated Step – Create FPS

For the Create FPS step we only support basic calculations for:

- Gross to Net
- Tax
- National Insurance
- Student and Postgraduate Loans
- Attachment of Earnings orders
- Non-Banded Pension Schemes
- Banded Pension Schemes
- Auto enrolment

The following checks are performed to ensure it is not used for more than it is designed for:

- Additional NI Periods
- Backdate NIC
- Benefit in Kind Cars
- Employee Level settings Aggregated Earnings, Employee Reference change, Foreign country, Irregular Employment, Off Payroll Worker, Payment to a non individual
- Excluded from FPS Absent, Suspended, On Holiday, Omit from RTI, Sub Contractors
- Expat settings EPM6 Override, Er NI Exempt, Tax Exempt %age
- Foreign Tax Credits
- Gross to net calculations Employer pays employees NICs
- Holiday Schemes
- Individual Calculation settings Late Reason, On Strike, Payment Date, Unpaid Absence
- Leavers from previous run
- Leavers in current run
- Negative Net Pay
- Override
- Pay component types Termination and Sporting, Flexible drawdown, Pension Death benefit, Serious ill health, Pension Stand Alone Lump Sum and Pension Commencement Excess Lump Sum, Pension (General) and Pension (Disability), Trivial Commutation
- Pay components marked as Benefits in Kind, Gross up, Reducing balance
- Pay spines
- Payment After Leaving/Death
- Prior Period Adjustment
- Round Net Pay
- Split Net Pay
- Standard Holiday pay
- Starters in the current run
- Statutory Absence

• Tax advance

Automated Step – Close Run

For the Close Run step we only support basic calculations for:

- Gross to Net
- Tax
- National Insurance
- Student and Postgraduate Loans
- Attachment of Earnings orders
- Non-Banded Pension Schemes
- Banded Pension Schemes
- Auto enrolment
- Auto enrolment dashboard

The following checks are performed to ensure it is not used for more than it is designed for:

- Additional NI Periods
- Apprenticeship levy
- Backdate NIC
- Benefit in Kind Cars
- Calculation Status Absent, Suspended and On Holiday
- Cost splits Enabled
- Expat settings EPM6 Override, Er NI Exempt, Tax exempt %age
- Foreign Tax Credits
- Gross to net calculations Employer pays employees NICs
- Holiday Schemes
- Leavers in current run
- Negative Net
- Override
- Pay Component Groups
- Pay Component types Termination and Sporting, Flexible drawdown, Pension Death benefit, Serious ill health, Pension Stand Alone Lump Sum and Pension Commencement Excess Lump Sum, Pension (General) and Pension (Disability), Trivial Commutation
- Pay Components Foreign Currencies, Global Rates, Pay Grades, Pro Rata Starters and Leavers
- Pay Components marked as Benefit in Kind, Gross Up, Reducing Balance
- Pay Spines
- Payment after leaving/death
- Prior Period Adjustment
- Round net pay
- Split net pay
- Standard holiday pay
- Starters in current run

- Statutory Absence
- Sub contractors
- Tax Advance

Appendix C – List of available reports

Report	Туре	Description
PARUN7\PSRUN7	Payroll Run	Cross cast employee payroll run details for this period. Grouped by Department within Branch.
PARUN6\PSRUN6	Payroll Run	Cross cast employee payroll run details for this period.
PARUNT3\PSRUNT3	Payroll Run	Payroll run totals only for this period, one page.
PARUNT7\PSRUNT7	Payroll Run	Department within branch payroll totals for this period, one page per department with branch, one page per branch and an overall total. Grouped by Department within Branch.
PAPEN1\PSPEN1	Payroll Run	Employee pension contributions this period broken down by scheme. Grouped by Pension Scheme Name.
PAPEN1BD\PSPEN1BD	Payroll Run	Employee pension contributions this period broken down by scheme. Grouped by Pension Scheme Name within Department within Branch.
PACSTPRD\PSCSTPRD	Payroll Run	Basic payroll run details for this period. Grouped by Cost Centre.
PACST4\PSCST4	Payroll Run	Cost centre totals for this period, one page per cost centre and an overall total. Grouped by Cost Centre.
PAPEN1C\PSPEN1C	Payroll Run	Employee pension contributions this period broken down by scheme. Grouped by Pension Scheme Name within Cost Centre.
PARUNT9\PSRUNT9	Payroll Run	Cost centre employee pay component values for this period and year to date. Excludes previous period leavers. Grouped by Cost Centre within Pay Component ID.
PARUNT5\PSRUNT5	Payroll Run	Departmental employee payroll run pay component values this period and year to date. Excludes previous period leavers. Grouped by Department within Pay Component ID.
PARUNT8\PSRUNT8	Payroll Run	Department within branch employee pay component values for this period and year to date. Excludes previous period leavers. Grouped by Department within Branch within Pay Component ID.

Index

Α

Appendix A – Best practice process templates 155 Appendix B – Unsupported Elements 163 Appendix C – List of available reports 168 Automated Step – Calculate 163 Automated Step – Close Run 166 Automated Step – Create FPS 164

С

Configuring vPA 16

D

Dashboard page 10

Н

How to set up a Group based on pay day 16 How to set up Teams 59

I

In more detail.... 3 Introduction 2

L

Login to vPA website 10

Ρ

Process Payroll – Director only 155 Process Payroll – Four Weekly 161 Process Payroll – Monthly 157 Process Payroll – Weekly 159

R

Responding to client approvals on the client's behalf 135

S

Schedule checking for an update 141

Server restart – Schedule Engine Shutdown 153

Signing off manual tasks as complete and responding to internal approvals 127

т

Terminology 6

U

Update available and scheduling installation 142 Update Process 145 Using Payroll Professional and vPA day-to-day 74

v

vPA Roles 7 vPA Version and Updates 140 vPA website 10, 74

W

Website 152 What approval steps are available? 5 What automated steps are available? 4 What is virtual Payroll Assistant (vPA)? 3 What software is involved? 3

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk	Tel: 0300 200 3200 Tel: 0300 200 3211 (new business)

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls	For IRIS Payroll Professional
Tel: 0344 815 5656	Tel: 0344 815 5676	Tel: 0345 057 3708
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk	Email: payrollsales@iris.co.uk

Contact Support

Your Product	Phone	E-mail
IRIS PAYE-Master	0344 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5661	ipsupport@iris.co.uk
IRIS GP Payroll	0344 815 5681	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5671	earniesupport@iris.co.uk
IRIS Payroll Professional (formerly Star)	01273 715300	payroll-support@iris.co.uk