



virtual *PayrollAssistant*

Guide - EOY 2024

March 2024

IRIS. Look forward

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Introduction

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

- Payroll Professional 2024 EOY Update or later is installed.
- All payroll data files opened in IPP 2024 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 un-paused 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 processor 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 assignment b) Groups assigned to the team that the user belongs to
Process Progress page	Yes	Yes	a) Processes that have no Team assignment b) Processes assigned to the team that the user belongs to
Step Progress page	Yes	Yes	a) Steps that have no Team assignment b) 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

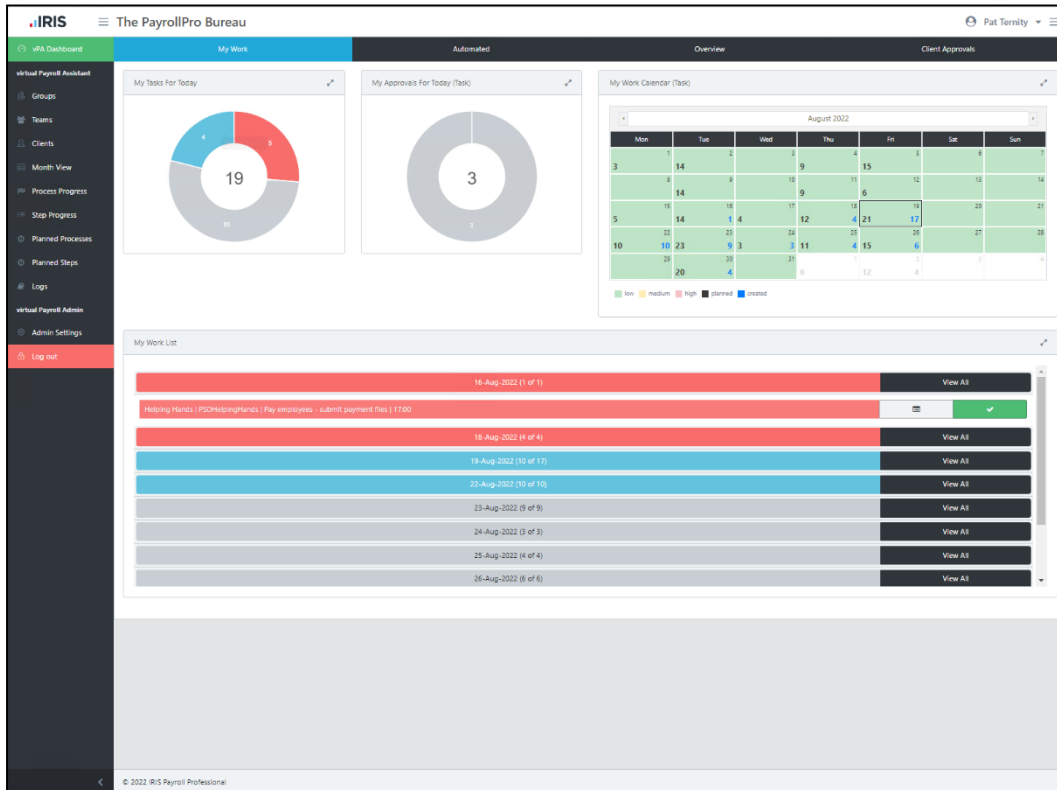
vPA website

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.



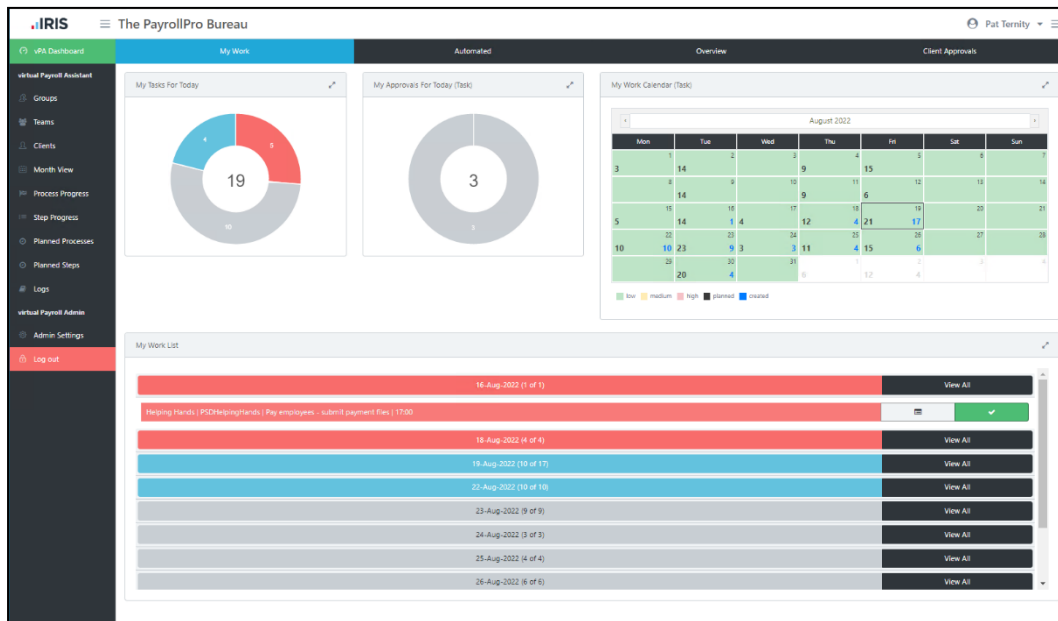
Dashboard page

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.

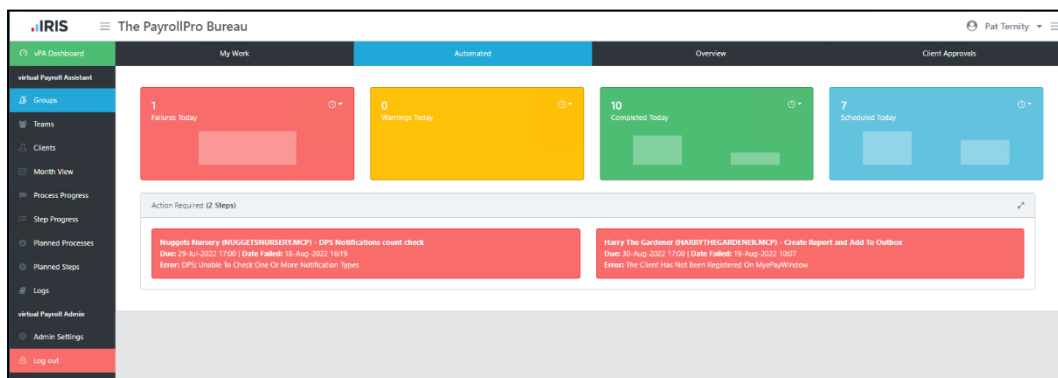
My Work



This tab contains four charts:

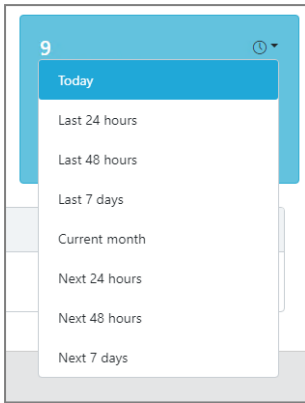
- ❑ **Action Required (Rejected Internal Approvals)** – this only appears if the user has any rejected approvals that have been marked as Action Required By them.
- ❑ **My Tasks For Today** - this is a donut chart which shows overall progress for all the manual tasks assigned to you today, it also includes 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.

Automated



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

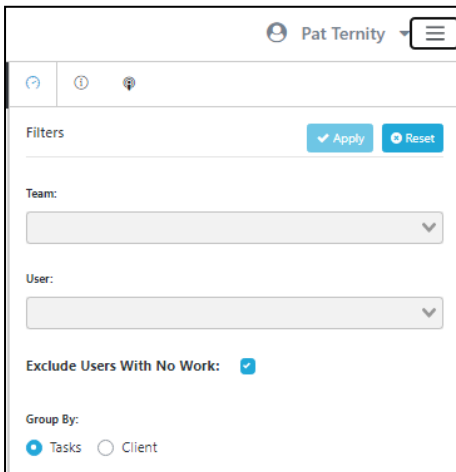
To change the date-time-range for these charts click the clock icon in the right-hand corner and choose the required date-time range from the drop-down list:



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.

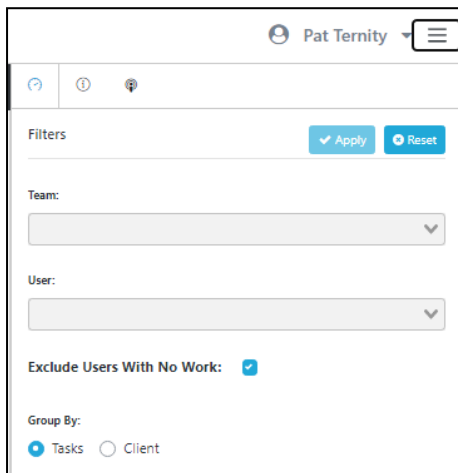
Overview



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.

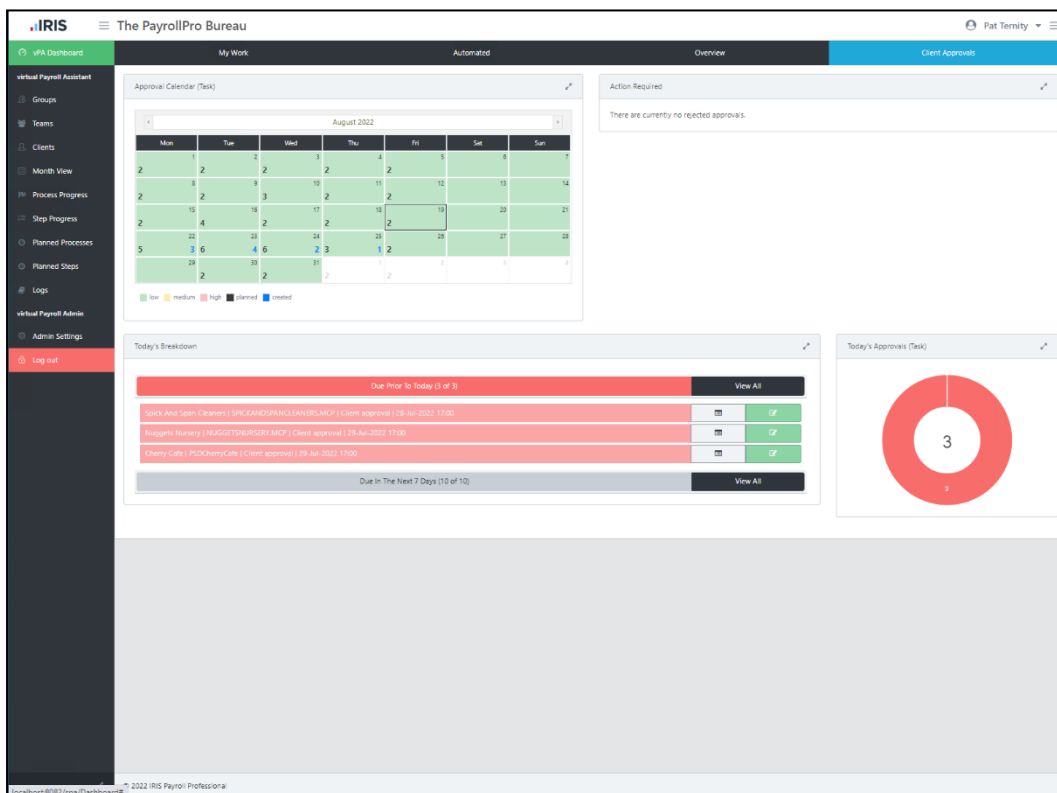
By default, these charts show the information by manual task, for all users who have at least one task assigned to them. You can use the filter under the burger bar on the right to:



- **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.

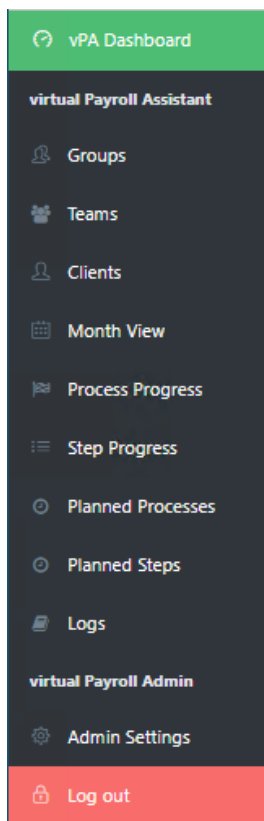
Client Approvals



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.

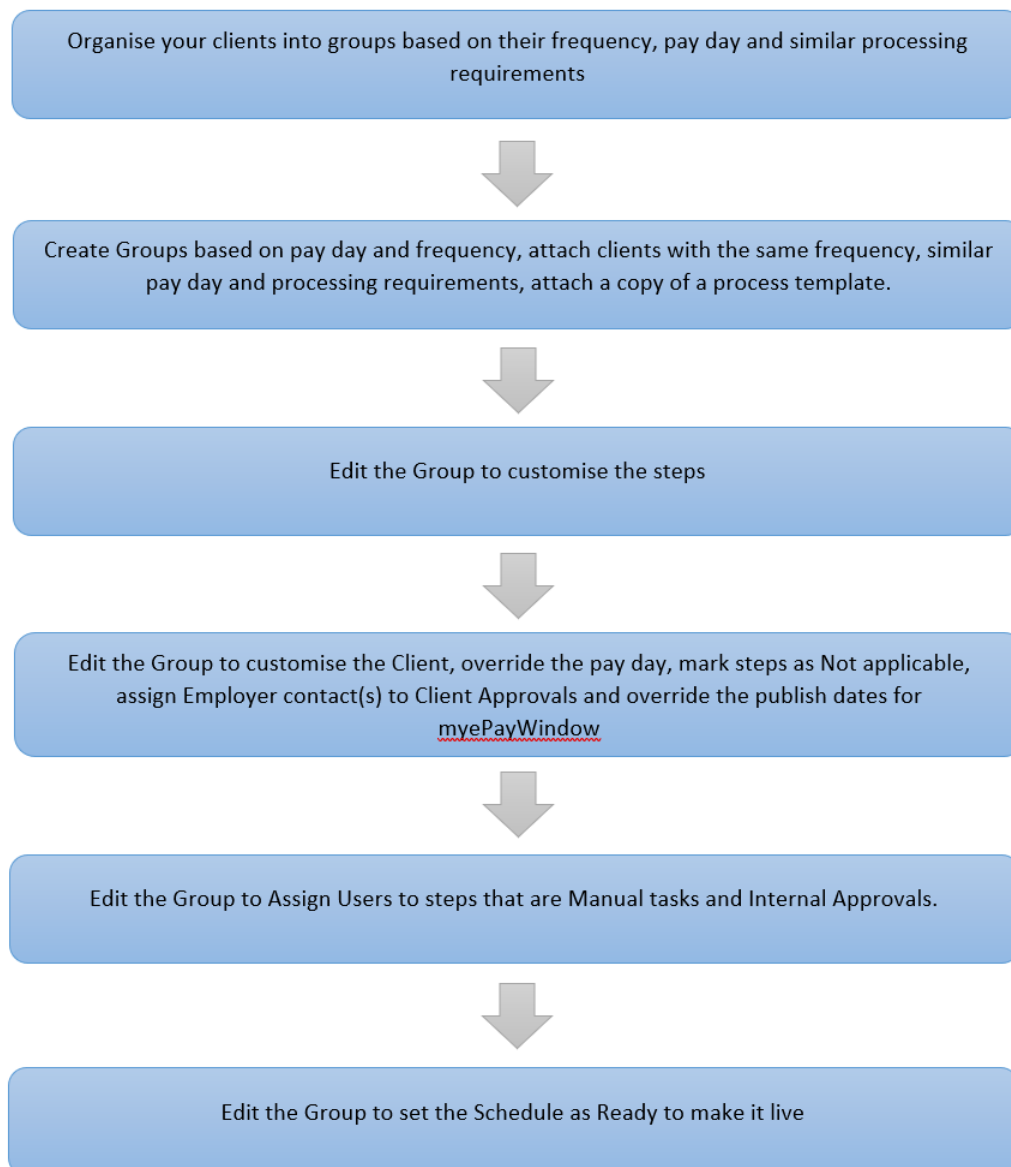
- **Process Progress** – allows you to see the progress of all clients' processes.
- **Step Progress** – shows the progress of individual steps which includes automatic and manual tasks for all groups, processes, and clients.
- **Planned Processes** – displays the future schedule for all clients in a 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

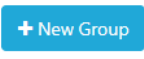
vPA has a 4 -step 'new group' wizard to streamline new group creation:

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

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

Name	Frequency	Period Number	Tax Year	Pay Day/Date	Region	Assigned Team	Status
Monthly - Changes - End of Month	Monthly	5	2022	31	England	Office 1	ENABLED
Monthly - No Changes	Monthly	5	2022	28	Scotland	Office 1	ENABLED
Weekly - Directors	Weekly	21	2022	Monday	England	Directors	ENABLED
Weekly - Thursday	Weekly	20	2022	Thursday	England	Office 1	ENABLED

Group set-up wizard – step 1

Click on  to open the new group wizard:

New Group Wizard - Details (1/4) Next Cancel

Enter a name for the group, and specify whether you want it to be based on Pay Day and/or Frequency. Note that if the group is set to be based on Pay Day then it is required to also be based on Frequency.

Name:

Based on Frequency: ⓘ

Frequency:

Period Number:

Tax Year:

Based on Pay Day: ⓘ

Pay Date:

Region:

Do not adjust for bank holidays: ⓘ

Do not adjust for weekends: ⓘ

Team Assignment: Select Team Clear

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 - Details (1/4) [Next] [Cancel]

Enter a name for the group, and specify whether you want it to be based on Pay Day and/or Frequency. Note that if the group is set to be based on Pay Day then it is required to also be based on Frequency.

Name:

Based on Frequency: ⓘ

Frequency:

Period Number:

Tax Year:

Based on Pay Day: ⓘ

Pay Day:

Region: ⓘ

Do not adjust for bank holidays: ⓘ

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) [Previous] [Next] [Cancel]

From the list of Available clients, highlight those which you wish to include in the group and use the green arrow to move them to the Selected clients list. You can use the red arrow to remove clients in the same manner.

Available clients: 25

Search... [Clear]

- Bits And Bobs | BB | PSDBitsandBobs
- Brides And Grooms | BG | BridesandGrooms.mcp
- Carpets Galore | CG | PSDCarpetsGalore
- Cherry Cafe | CC | PSDCherryCafe
- Country Homes | CH | CountryHomes.mcp
- Crunchy Accountants | CA | PSDCrunchAccountants
- Denzel's Garage | DG | DenzelsGarage.mcp
- Duke Solicitors | DS | DukeSolicitors.mcp
- Fighting Fit Gym | FF | PSDFightingFitGym
- Helping Hands | HH | PSDHelpingHands
- Home Improvements | HI | HomeImprovements.mcp
- Menagerie Castle | MC | PSDMenagerieCastle
- Mike's Motorbike Shop | MMS | PSDMikesMotorbikeShop
- Nuggets Nursery | NN | NuggetsNursery.mcp
- Shelly's Cycle Shop | SC | ShellysCycleShop.mcp

Selected clients: 0


Search... [Clear]

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



The screenshot shows the 'New Group Wizard - Process (3/4)' window. It has a title bar with '← Prev', 'Next →', and 'Cancel' buttons. The main content area contains the instruction: 'Select a template to base the process on and specify a name for it.' Below this, there is a 'Selected template:' label followed by a dropdown menu and a 'Preview' button. Below that is a 'Name:' label followed by a text input field.

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:

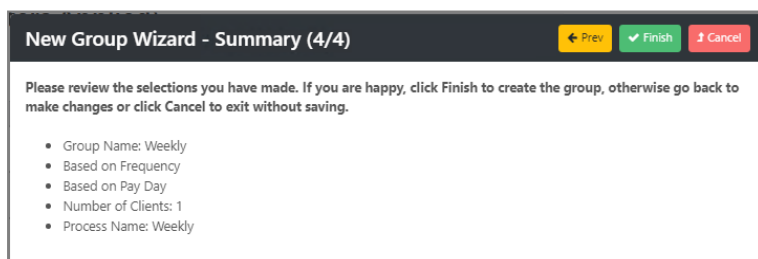


The screenshot shows the 'Process Preview (Process Payroll - Four Weekly)' window. It has a title bar with 'Process Preview (Process Payroll - Four Weekly)' and a 'Close' button. The main content area contains a table with the following columns: Step Name, Job Type, Start, and Due.

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
Create Next Process	Create Next Process	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



The screenshot shows the 'New Group Wizard - Summary (4/4)' window. It has a title bar with '← Prev', 'Finish', and 'Cancel' buttons. The main content area contains the instruction: 'Please review the selections you have made. If you are happy, click Finish to create the group, otherwise go back to make changes or click Cancel to exit without saving.' Below this, there is a list of selections:

- Group Name: Weekly
- Based on Frequency
- Based on Pay Day
- Number of Clients: 1
- Process Name: Weekly

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':

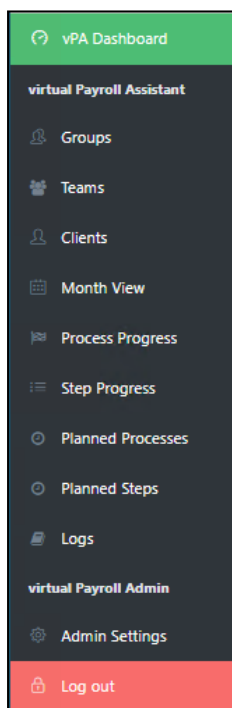
Once the group has been created you may need to edit the group to:

- 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 will 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:

Groups (Advanced Filters Applied) + New Group Refresh

Search Search Clear Status: Enabled Sorted: Name By: [icon]

Name	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	+

Showing record 1 to 5 of 5 item(s)

Next, click on the **Edit** action:

Groups (Advanced Filters Applied) + New Group Refresh

Search Search Clear Status: Enabled Sorted: Name By: [icon]

Name	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	-

Showing record 1 to 5 of 5 item(s)

The **Edit Group** form is displayed (see below)

Edit Group - Weekly - Thursday Client Process Override Save Close

Group Details	Name:	Weekly - Thursday
Process	Based on Frequency:	<input checked="" type="checkbox"/> <input type="checkbox"/>
Clients	Frequency:	Weekly
	Period Number:	26
	Tax Year:	2021
	Based on Pay Day:	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Pay Day:	Thursday
	Region:	England
	Do not adjust for bank holidays:	<input type="checkbox"/> <input checked="" type="checkbox"/>
	Do not adjust for weekends:	<input type="checkbox"/> <input checked="" type="checkbox"/>
	Team Assignment:	Office 1 Select Team Clear
	Manual Assignment:	Pat Ternity Select User Clear
	Status:	Enabled

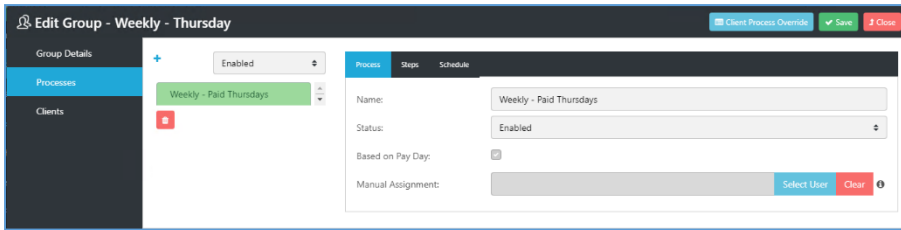
The **Group details** tab shows the information entered during the New Group Wizard, you can change the settings, if required.

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.

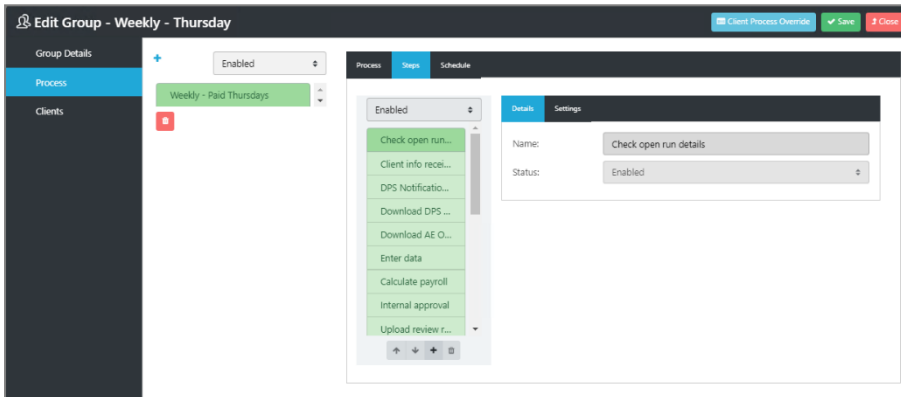
Customising steps in a Group Process

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



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:



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.

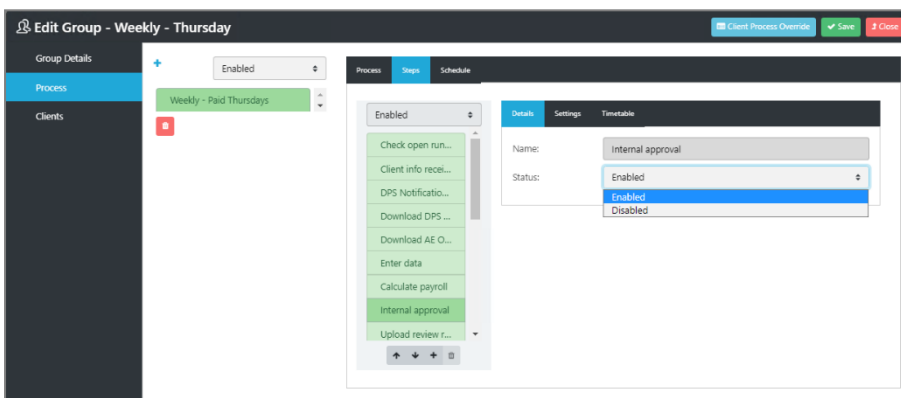
Use the buttons under the list of steps to add, delete and re-order the steps:



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:

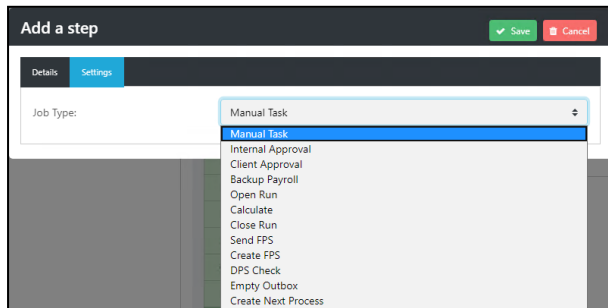


To add a manual step click on the plus sign, the **Add a step** form will open:



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:



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.

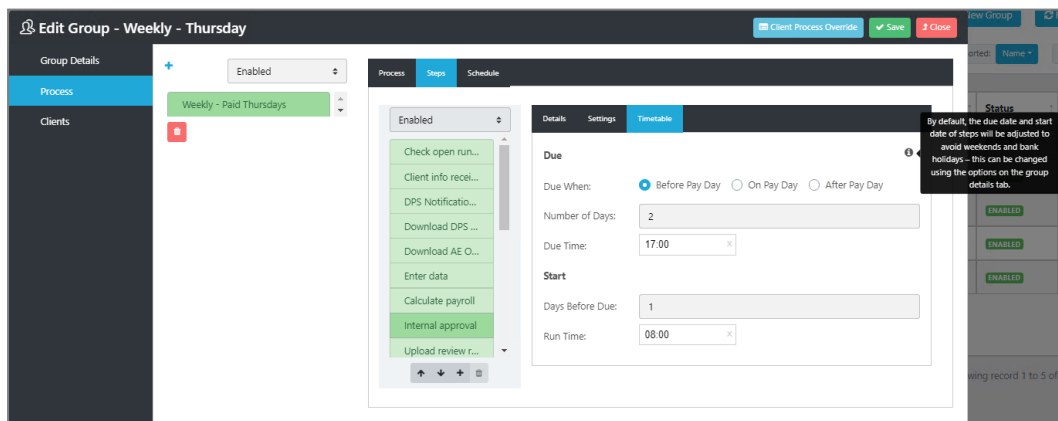
The first step called **Check open run details** is an automated step which checks that the Client data files are in the tax year, frequency and period number set at group level. This step cannot be moved, deleted, or disabled.

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:



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 calendar days.
- **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 calendar days.

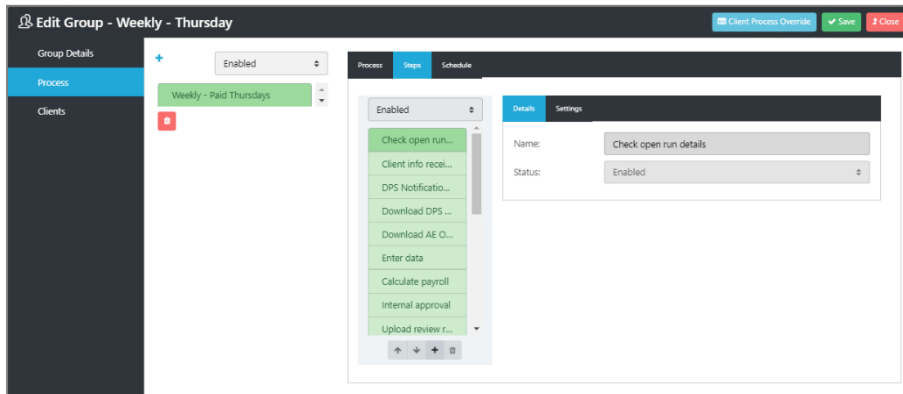
- **Run Time** - enter the time of the day that the step can be started.

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.

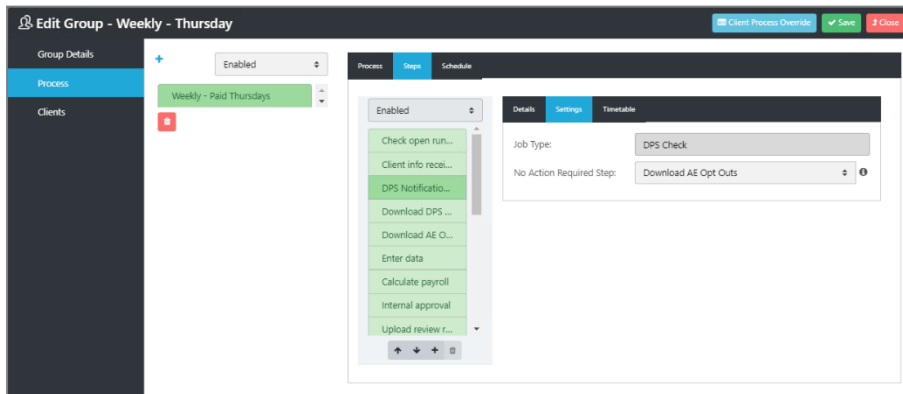
Edit the DPS Check step

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**.

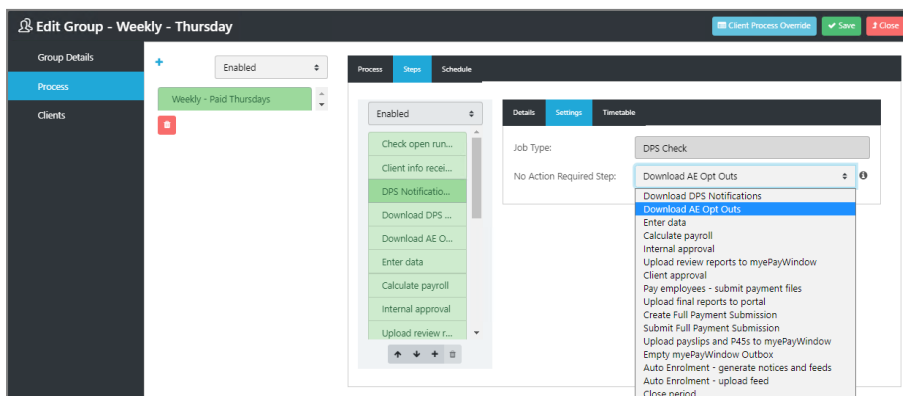
From the **Edit Group** screen select **Processes** then **Steps**:



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



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:



Click on **Save**.

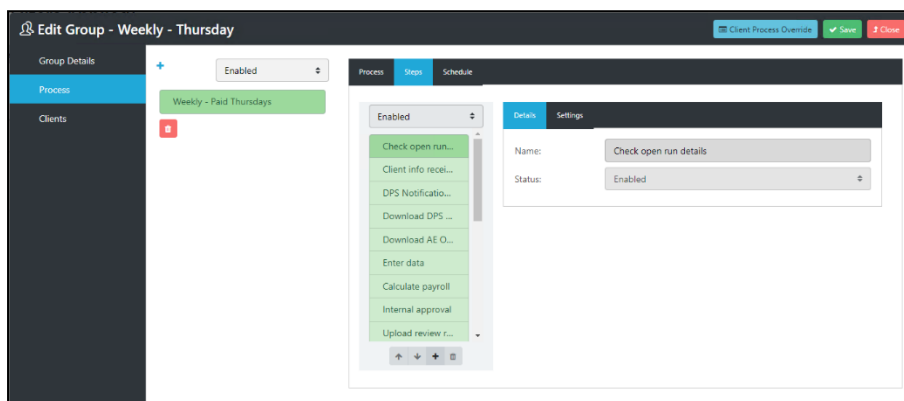
Edit the Empty Outbox step

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

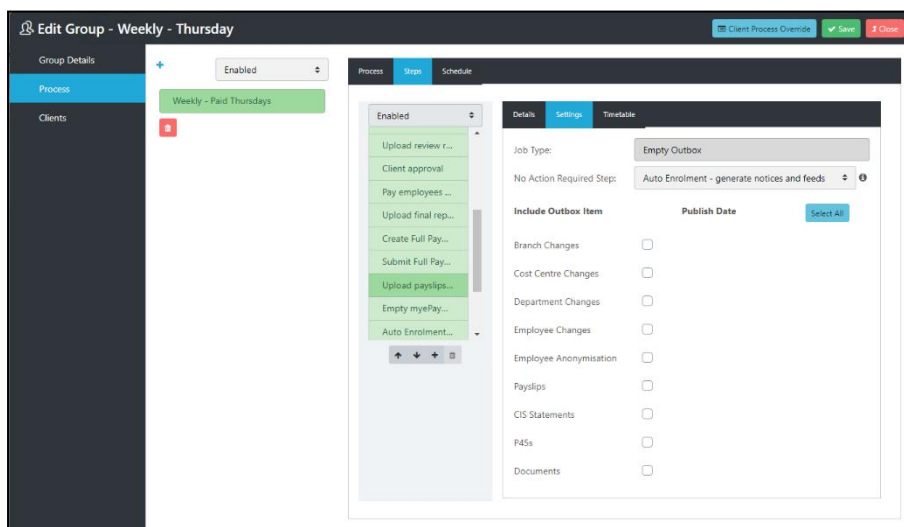
- Department Changes
- Cost Centre Changes
- Branch Changes
- Anonymise Employee
- Employee Changes
- Payslips
- Documents
- CIS Statements
- P45s

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**.

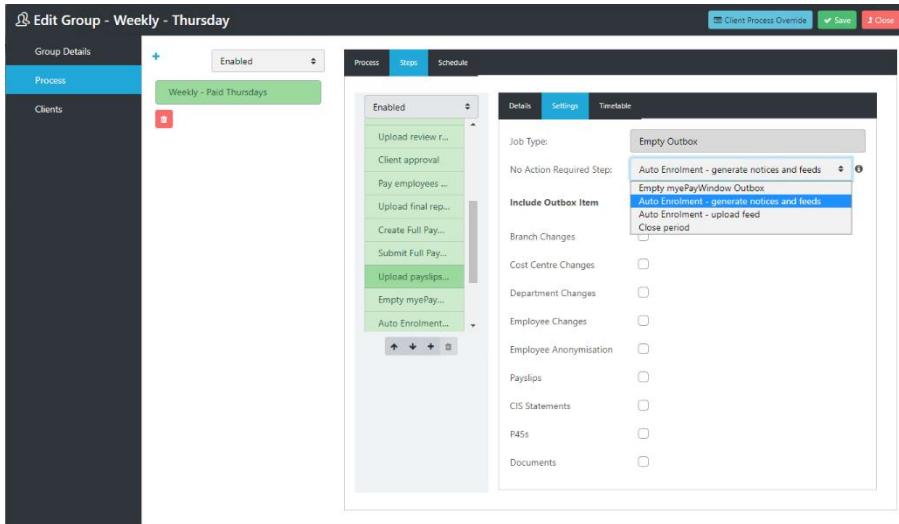
From the **Edit Group** screen select **Processes** then **Steps**:



Highlight the **Empty Outbox** step, then select **Settings**:

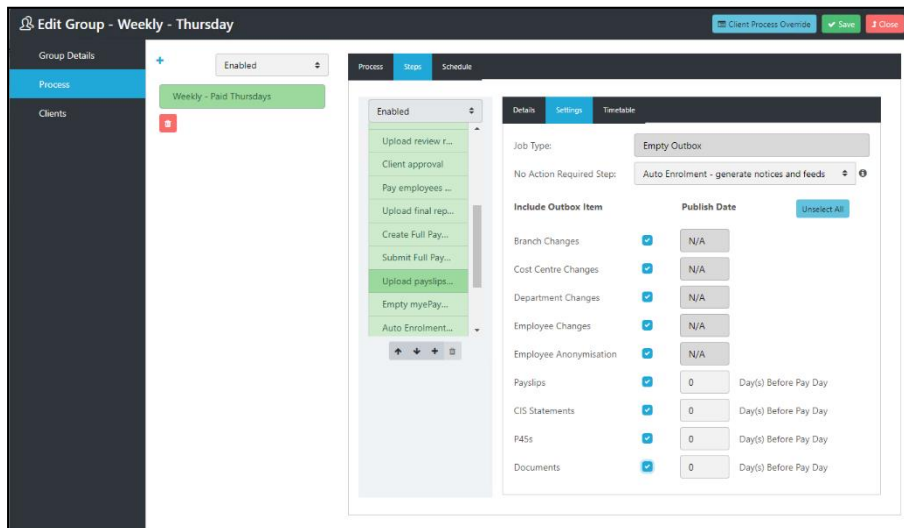


Using the drop down for **No Action Required Step**, select the step for the process to move onto when the selected item type(s) have been uploaded to myePayWindow successfully:



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

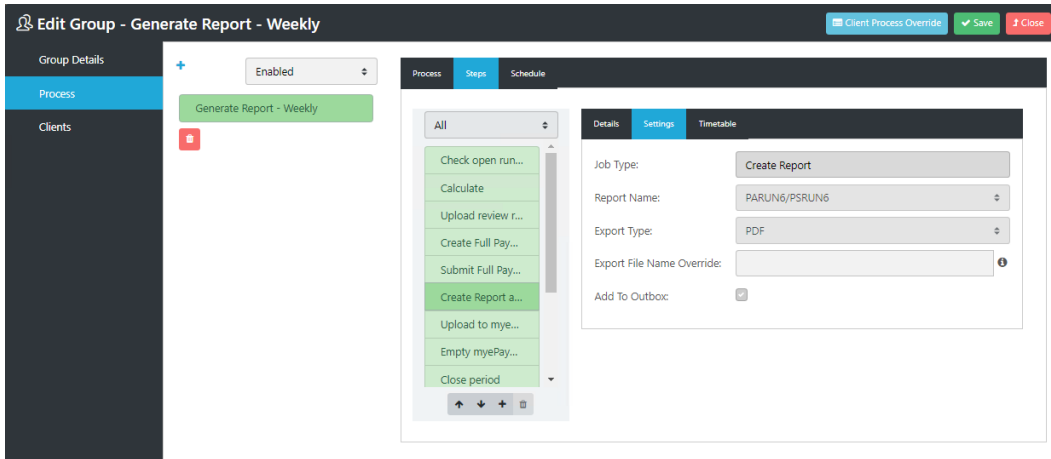
Then complete the **Publish date** information for each outbox item selected, if applicable. If the item type is to be published to the employees on pay day leave it as zero, otherwise enter the number of days before pay day.



Click on **Save**.

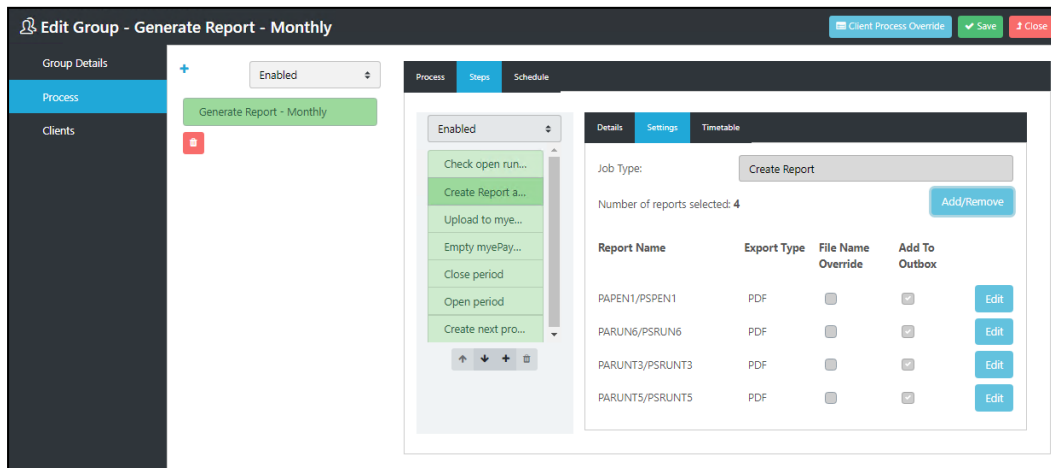
Edit the Create Report step

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

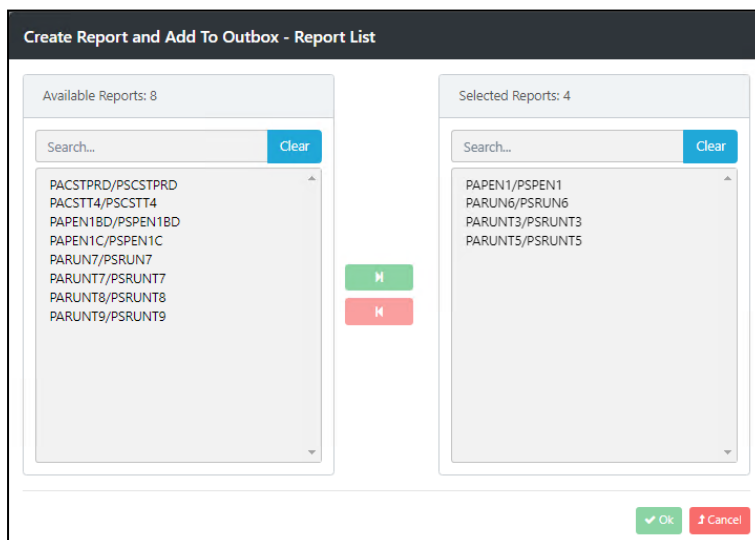


Changing the reports

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**:




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



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

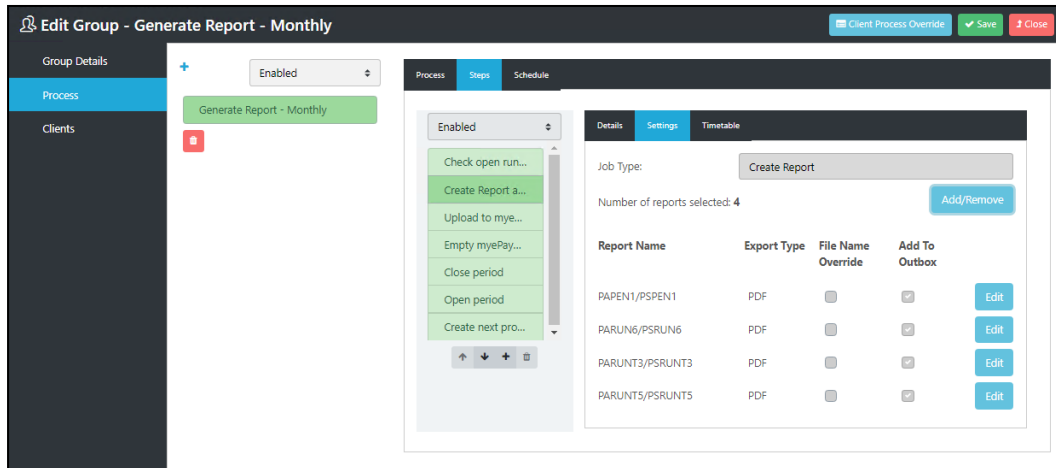
- Highlight the available report and then click on **H** to add it to the Selected Reports list
- You can select multiple reports by holding down the Ctrl button on your keyboard then click **H**.

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**:



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:



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.

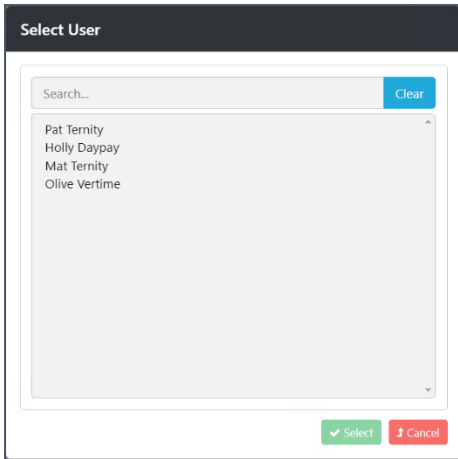
Assigning user at Group level

From the **Edit Group** screen, click on **Group Details**:

The screenshot shows the 'Edit Group - Weekly - Thursday' interface. The 'Group Details' section is active, displaying the following fields and values:

- Name: Weekly - Thursday
- Based on Frequency: (radio button)
- Frequency: Weekly
- Period Number: 26
- Tax Year: 2021
- Based on Pay Day: (radio button)
- Pay Day: Thursday
- Region: England
- Do not adjust for bank holidays: (radio button)
- Do not adjust for weekends: (radio button)
- Team Assignment: Office 1 (with 'Select Team' and 'Clear' buttons)
- Manual Assignment: Pat Ternity (with 'Select User' and 'Clear' buttons)
- Status: Enabled

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



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

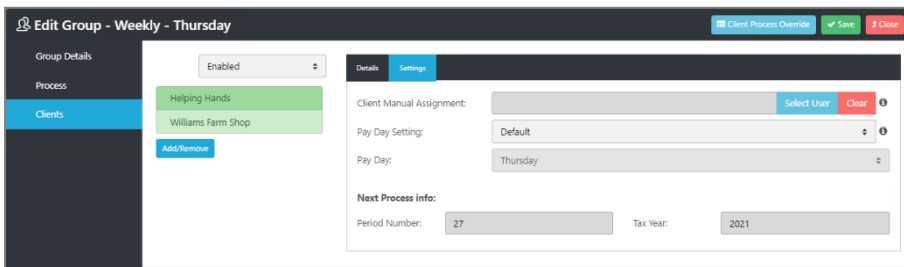
If you need to remove the assigned user, then click on the **Clear** button.

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

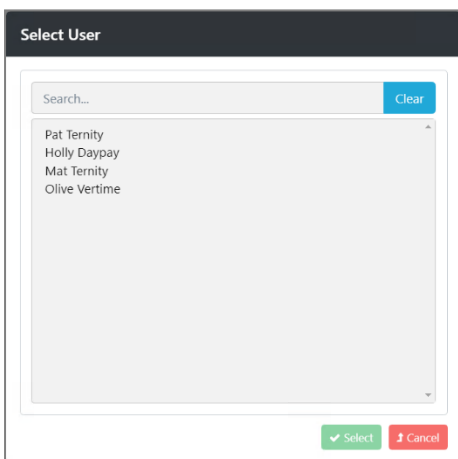
Click on **Save**.

Assigning user at Group | Client level

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



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



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

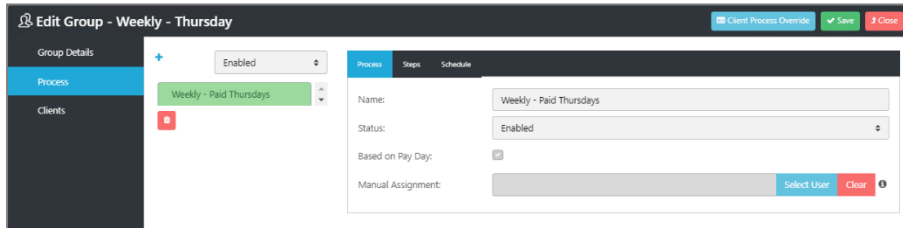
If you need to remove the manual assignment, then click on the **Clear** button.

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

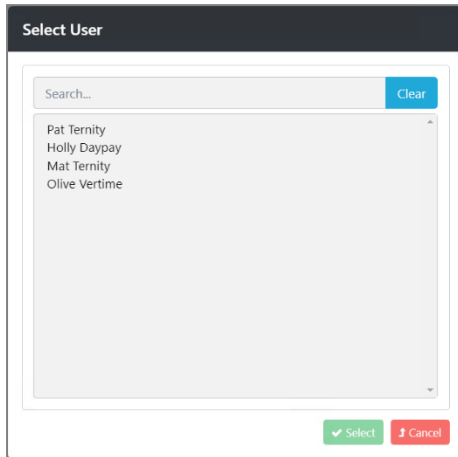
Click on **Save**.

Assigning user at Group | Process level

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



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



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

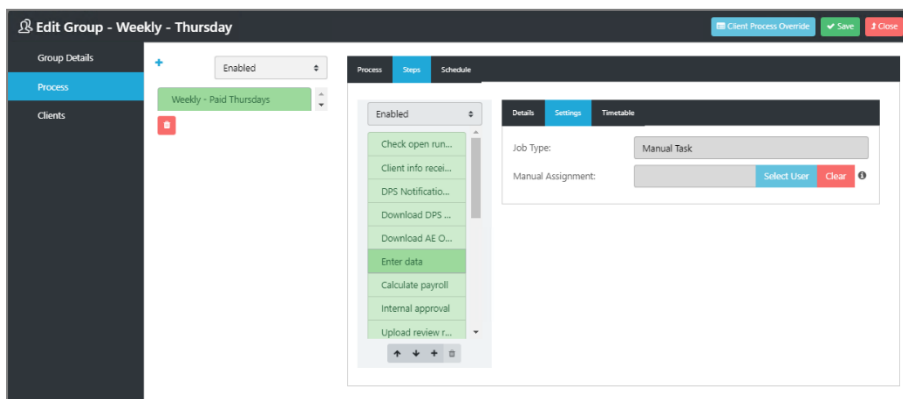
If you need to remove the manual assignment, then click on the **Clear** button.

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

Click on **Save**.

Assigning user at Group | Process | Step level

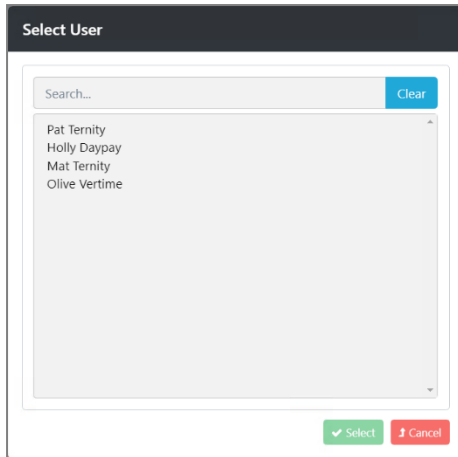
From the **Edit Group** screen, click on **Processes**, highlight the Process, select the **Steps** tab:



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:



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**:

Step Name	Job Type	User	Scheduled	Due
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
DPS Notifications 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 Opt 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 payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Upload review reports to myePayWindow	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 reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00	07-Oct-2021 17:00
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00	07-Oct-2021 17:00
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Auto Enrolment - generate notices and feeds	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
Create next process	Create Next Process		05-Oct-2021 08:00	08-Oct-2021 17:00

Under **View** select **Manual Task Assignment** then click on **Edit**:

Client Process Override Save Discard

Client: Helping Hands Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: Manual Task Assignment

Client Process Manual Assignment: Select User Clear

Step Name	Job Type	Assigned User	Assignment Level	
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Pat Ternity	1. Group	Override
DPS Notifications count check	DPS Check			
Download DPS Notifications	Manual Task	Pat Ternity	1. Group	Override
Download AE Opt Outs	Manual Task	Pat Ternity	1. Group	Override
Enter data	Manual Task	Pat Ternity	1. Group	Override
Calculate payroll	Manual Task	Pat Ternity	1. Group	Override
Internal approval	Internal Approval			
Upload review reports to myePayWindow	Manual Task	Pat Ternity	1. Group	Override
Client approval	Client Approval			
Pay employees - submit payment files	Manual Task	Pat Ternity	1. Group	Override
Upload final reports to portal	Manual Task	Pat Ternity	1. Group	Override
Create Full Payment Submission	Manual Task	Pat Ternity	1. Group	Override
Submit Full Payment Submission	Send FPS			
Upload payslips and P45s to myePayWindow	Empty Outbox			
Empty myePayWindow Outbox	Manual Task	Pat Ternity	1. Group	Override
Auto Enrolment - generate notices and feeds	Manual Task	Pat Ternity	1. Group	Override
Auto Enrolment - upload feed	Manual Task	Pat Ternity	1. Group	Override
Close period	Close Run			
Open period	Open Run			
Create next process	Create Next Process			

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

Select User

Search... Clear

- Holly Daypay
- Mat Ternity
- Olive Vertime
- Pat Ternity

Select None Select 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 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:

Client Process Override Close

Client: Process: Group:

View:

Step Name	Job Type	User	Scheduled	Due
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
DPS Notifications 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 Opt 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 payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Upload review reports to myePayWindow	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 reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00	07-Oct-2021 17:00
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00	07-Oct-2021 17:00
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Auto Enrolment - generate notices and feeds	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
Create next process	Create Next Process		05-Oct-2021 08:00	08-Oct-2021 17:00

Under **View** select **Manual Task Assignment** then click on **Edit**:

Client Process Override Save Discard

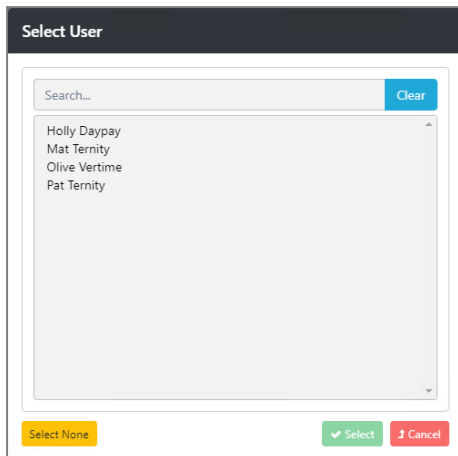
Client: Process: Group:

View:

Client Process Manual Assignment: Select User Clear

Step Name	Job Type	Assigned User	Assignment Level	
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Pat Ternity	1. Group	Override
DPS Notifications count check	DPS Check			
Download DPS Notifications	Manual Task	Pat Ternity	1. Group	Override
Download AE Opt Outs	Manual Task	Pat Ternity	1. Group	Override
Enter data	Manual Task	Pat Ternity	1. Group	Override
Calculate payroll	Manual Task	Pat Ternity	1. Group	Override
Internal approval	Internal Approval			
Upload review reports to myePayWindow	Manual Task	Pat Ternity	1. Group	Override
Client approval	Client Approval			
Pay employees - submit payment files	Manual Task	Pat Ternity	1. Group	Override
Upload final reports to portal	Manual Task	Pat Ternity	1. Group	Override
Create Full Payment Submission	Manual Task	Pat Ternity	1. Group	Override
Submit Full Payment Submission	Send FPS			
Upload payslips and P45s to myePayWindow	Empty Outbox			
Empty myePayWindow Outbox	Manual Task	Pat Ternity	1. Group	Override
Auto Enrolment - generate notices and feeds	Manual Task	Pat Ternity	1. Group	Override
Auto Enrolment - upload feed	Manual Task	Pat Ternity	1. Group	Override
Close period	Close Run			
Open period	Open Run			
Create next process	Create Next Process			

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



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

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

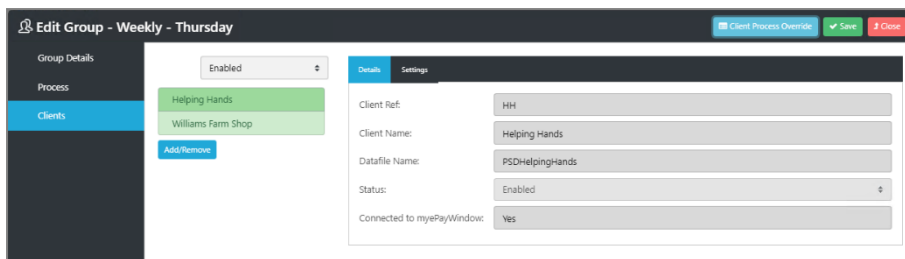
If you need to remove the manual assignment, then click on the **Clear** button.

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**:



Under **View** select **Manual Task Assignment** to see the following:

Client Process Override Edit Close

Client: Helping Hands Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: Manual Task Assignment

Client Process Manual Assignment:

Step Name	Job Type	Assigned User	Assignment Level
Check open run details	Initialise Process		
Client info received - Ready to process	Manual Task	Pat Ternity	1. Group
DPS Notifications count check	DPS Check		
Download DPS Notifications	Manual Task	Pat Ternity	1. Group
Download AE Opt Outs	Manual Task	Pat Ternity	1. Group
Enter data	Manual Task	Pat Ternity	1. Group
Calculate payroll	Manual Task	Pat Ternity	1. Group
Internal approval	Internal Approval		
Upload review reports to myePayWindow	Manual Task	Pat Ternity	1. Group
Client approval	Client Approval		
Pay employees - submit payment files	Manual Task	Pat Ternity	1. Group
Upload final 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 payslips and P45s to myePayWindow	Empty Outbox		
Empty myePayWindow Outbox	Manual Task	Pat Ternity	1. Group
Auto Enrolment - generate notices and feeds	Manual Task	Pat Ternity	1. Group
Auto Enrolment - upload feed	Manual Task	Pat Ternity	1. Group
Close period	Close Run		
Open period	Open Run		
Create next process	Create Next Process		

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:

Client Process Override Edit Close

Client: Helping Hands Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: Helping Hands
Williams Farm Shop

Client Process Manual Assignment:

Step Name	Job Type	Assigned User	Assignment Level
Check open run details	Initialise Process		
Client info received - Ready to process	Manual Task	Pat Ternity	1. Group

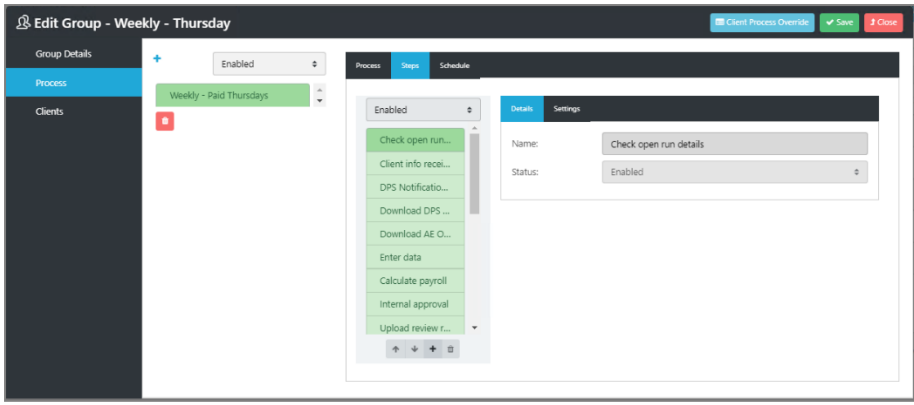
Assign user to Internal approval steps

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

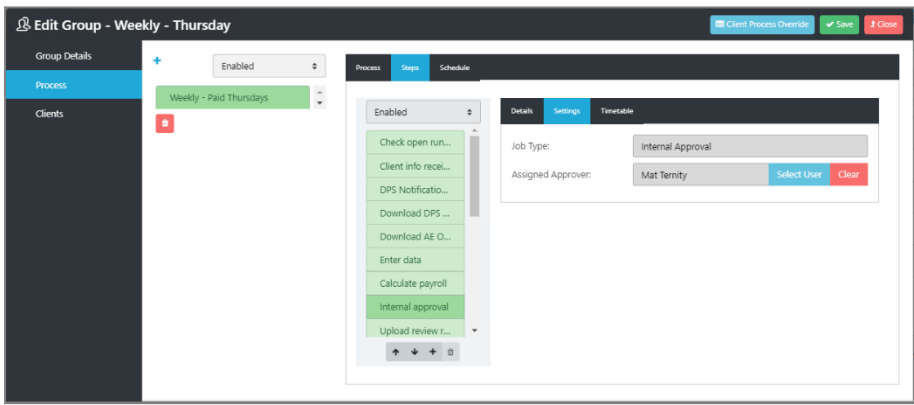
1. Group|Process|Step level
2. Group|Client|Process|Step level

Assign user at Group|Process|Step level

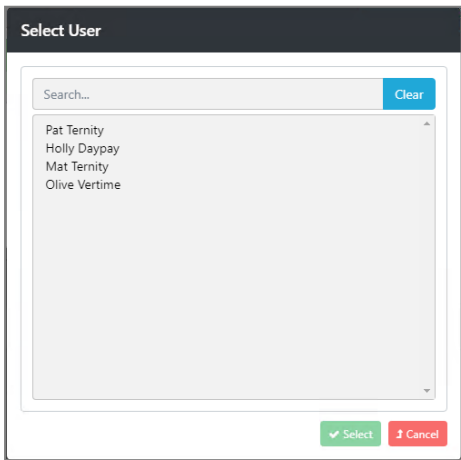
From the **Edit Group** screen select **Processes** then **Steps**:



Highlight the **Internal approval** step then **Settings**:



Next the **Assigned Approver** click on **Select User**:

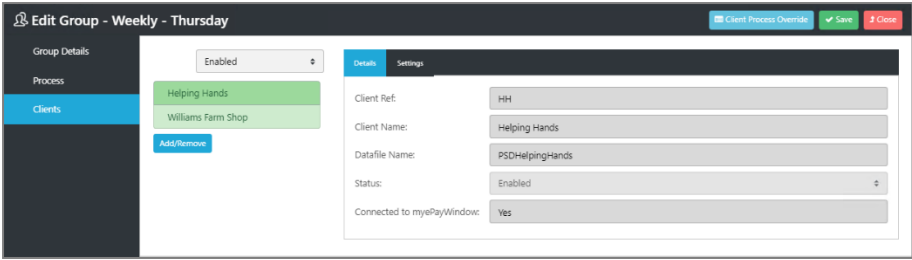


Highlight the **user** then click on **Select**.

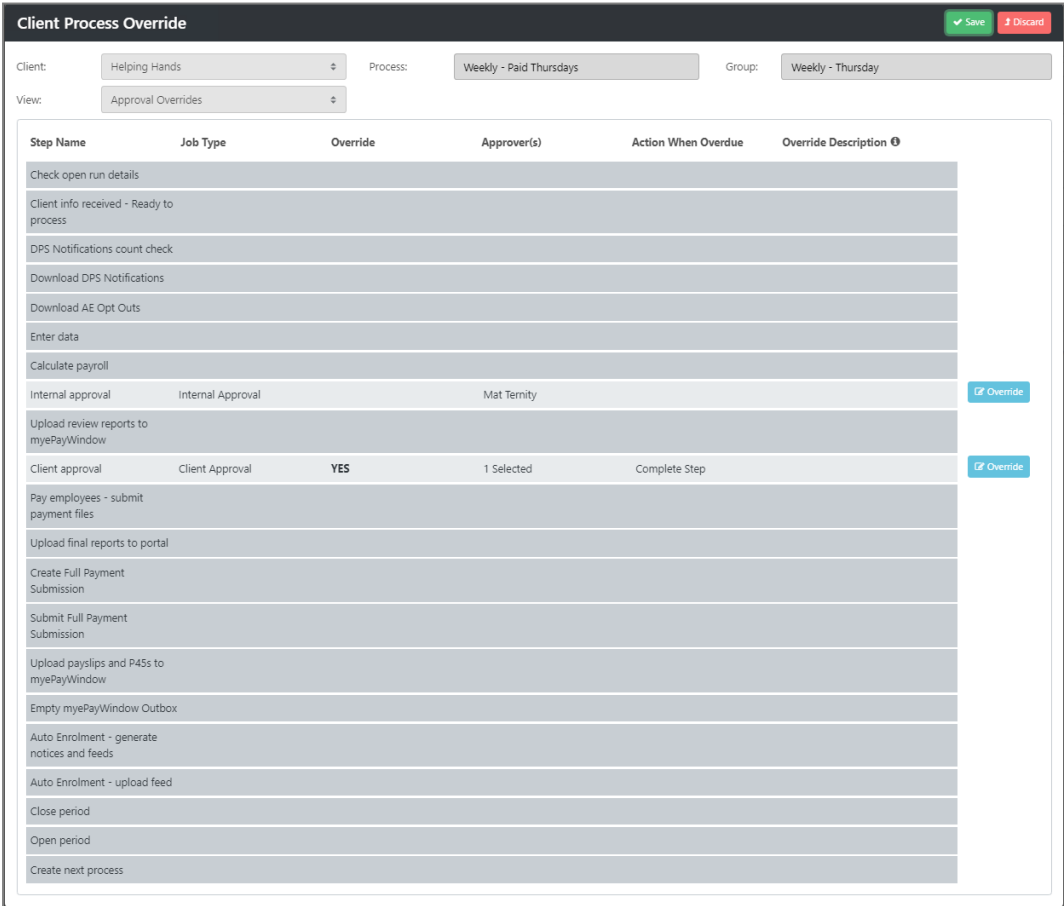
Click on **Save**.

Assign user at Group|Client|Process|Step level

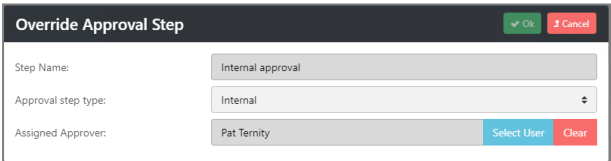
From the **Edit Group** screen select **Clients**, highlight the **client**:



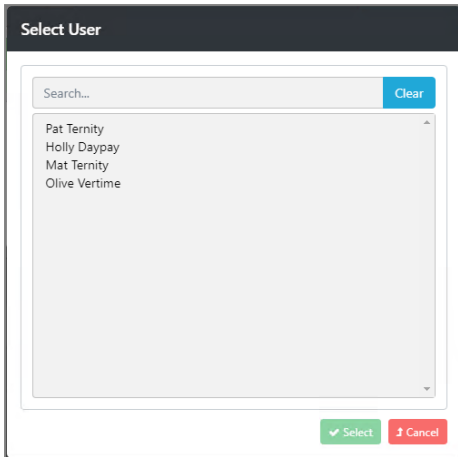
Click on **Client Process Override**, under **View** using the drop down select **Approvals Override** then click on **Edit**:



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



Next to **Assigned Approver** click on **Select User**:



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:

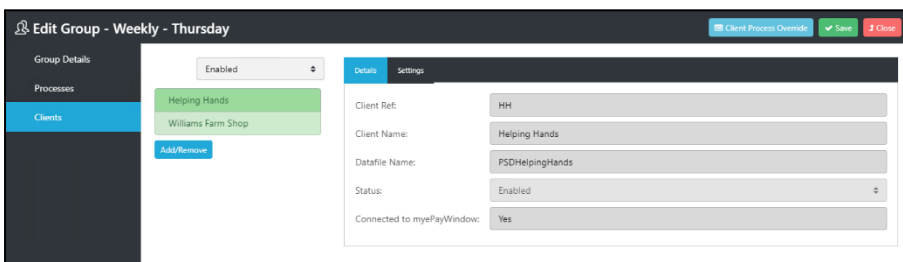
1. Group
2. Group|Client
3. Group|Process
4. Group|Client|Process

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.

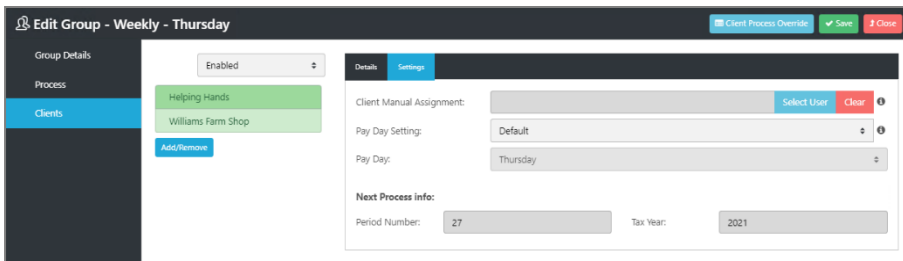
Override Client's pay day

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

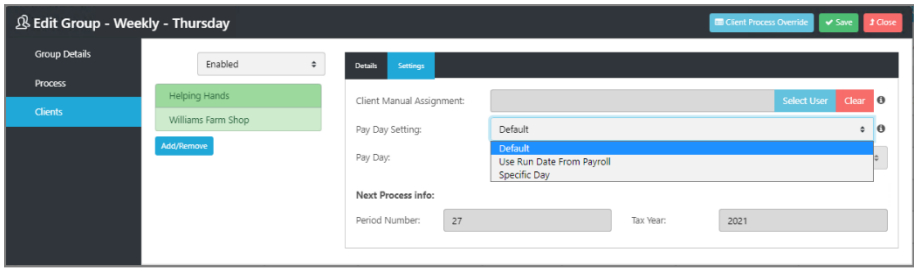
From **Edit Group** screen select **Clients**:



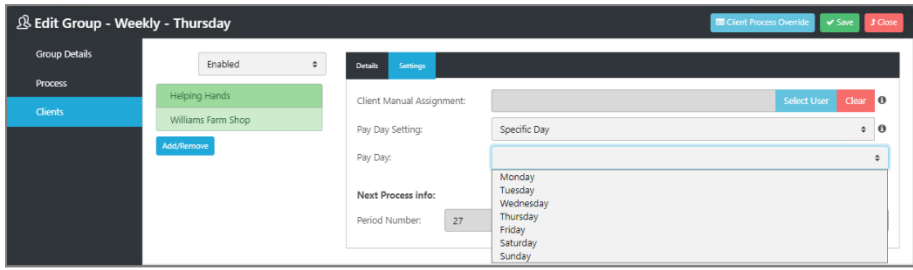
Highlight the Client and then select **Settings** tab:



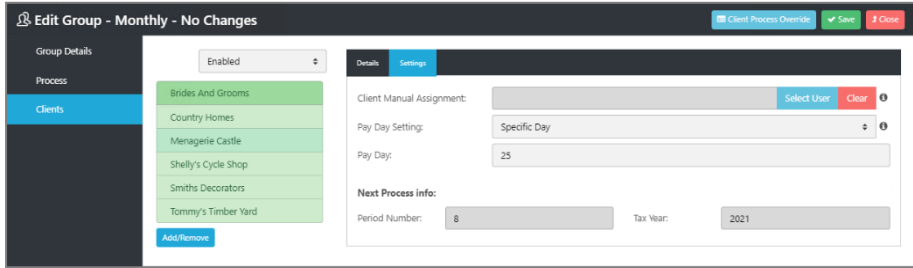
These settings will default to those selected at Group level. Using the drop down for **Pay Day Setting**, you will see three options:



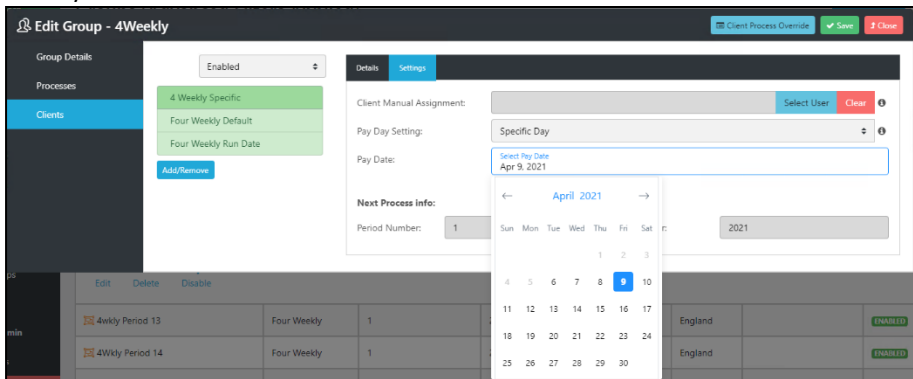
- ❑ **Default** – this is the setting at group level.
- ❑ **Use Run Date From Payroll** – this option will get the date from the client’s data file when the client’s process is created for the next payroll run. The same checks are performed to ensure the client’s data file is in the tax year, period 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:



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



and select the date based on the Period number and Tax Year when the Group’s frequency is set as Four Weekly:



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:

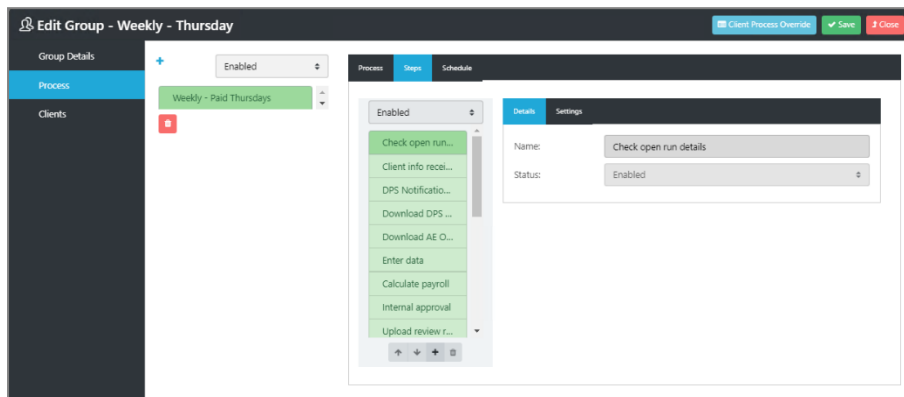
1. Group | Process | Step level
2. Group | Client | Process | Step level

Group | Process | Step level

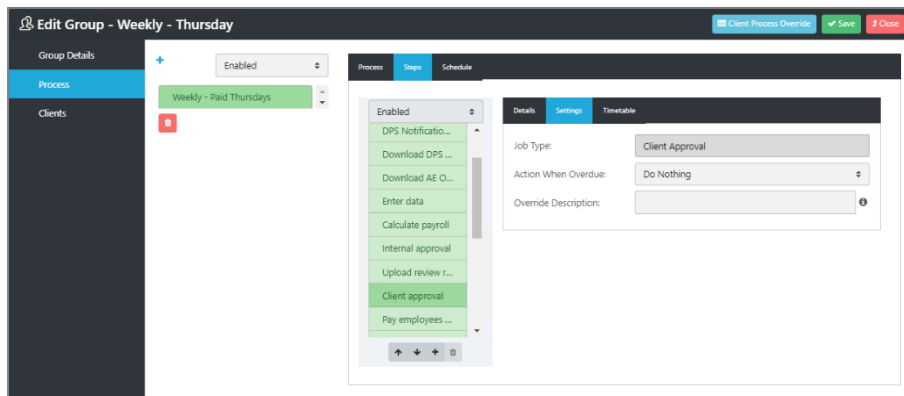
At this level you can change the following for a all clients:

- 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**:

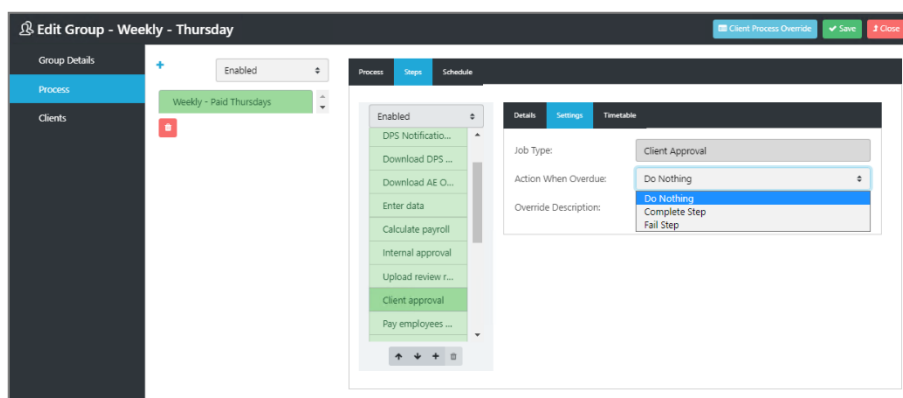


Now highlight the **Client approval** step and select **Settings**:



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:



- **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.

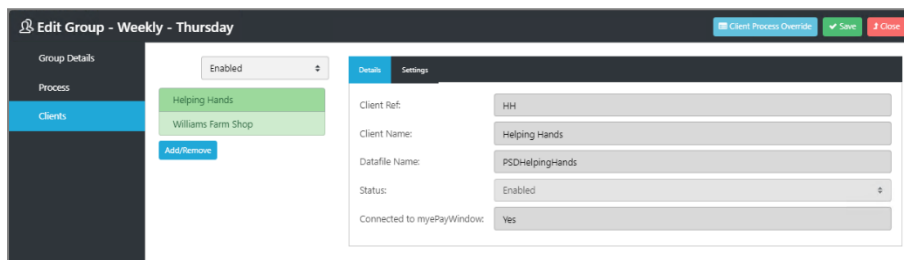
Click on **Save**.

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**:



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

Client Process Override					
Step Name	Job Type	Override	Approver(s)	Action When Overdue	Override Description ⓘ
Check open run details					
Client info received - Ready to process					
DPS Notifications count check					
Download DPS Notifications					
Download AE Opt Outs					
Enter data					
Calculate payroll					
Internal approval	Internal Approval		Mat Ternity		Override
Upload review reports to myePayWindow					
Client approval	Client Approval	YES	1 Selected	Complete Step	Override
Pay employees - submit payment files					
Upload final reports to portal					
Create Full Payment Submission					
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					
Open period					
Create next process					

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

Override Approval Step [Remove Override](#) [Ok](#) [Cancel](#)

Step Name:

Approval step type:

Action When Overdue:

Override Description:

Assigned Approvers: [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:

Approval step type:

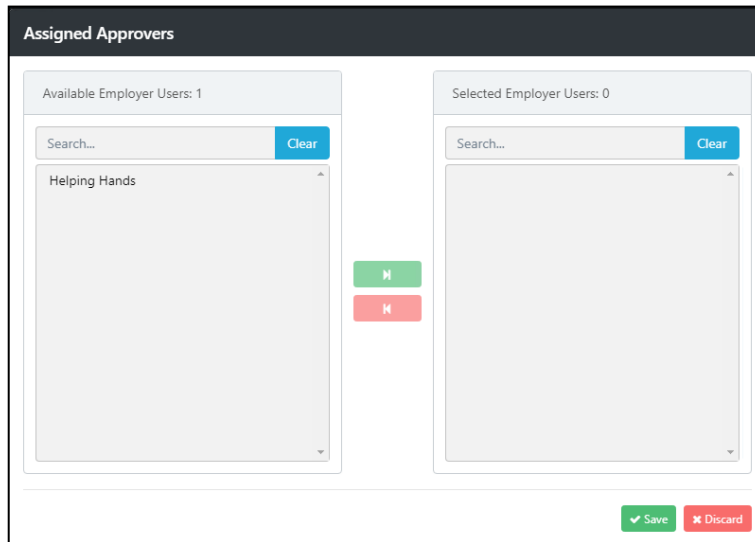
Action When Overdue:

Override Description:

Assigned Approvers: [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:



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 Group** screen select **Clients** and highlight the client, click on **Client Process Override**:

Client Process Override Close

Client: Helping Hands Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: Overview / Process Preview

Step Name	Job Type	User	Scheduled	Due
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
DPS Notifications 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 Opt 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 payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Upload review reports to myePayWindow	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 reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00	07-Oct-2021 17:00
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00	07-Oct-2021 17:00
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Auto Enrolment - generate notices and feeds	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
Create next process	Create Next Process		05-Oct-2021 08:00	08-Oct-2021 17:00

Using the drop down for **View** select **N/A Settings** then **Edit**:

Client Process Override Edit Close

Client: Helping Hands Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: N/A Settings

Step Name	Job Type	N/A
Check open run details	Initialise Process	
Client info received - Ready to process	Manual Task	<input type="checkbox"/>
DPS Notifications count check	DPS Check	<input type="checkbox"/>
Download DPS Notifications	Manual Task	<input type="checkbox"/>
Download AE Opt Outs	Manual Task	<input type="checkbox"/>
Enter data	Manual Task	<input type="checkbox"/>
Calculate payroll	Manual Task	<input type="checkbox"/>
Internal approval	Internal Approval	<input type="checkbox"/>
Upload review reports to myePayWindow	Manual Task	<input type="checkbox"/>
Client approval	Client Approval	<input type="checkbox"/>
Pay employees - submit payment files	Manual Task	<input type="checkbox"/>
Upload final reports to portal	Manual Task	<input type="checkbox"/>
Create Full Payment Submission	Manual Task	<input type="checkbox"/>
Submit Full Payment Submission	Send FPS	<input type="checkbox"/>
Upload payslips and P45s to myePayWindow	Empty Outbox	<input type="checkbox"/>
Empty myePayWindow Outbox	Manual Task	<input type="checkbox"/>
Auto Enrolment - generate notices and feeds	Manual Task	<input type="checkbox"/>
Auto Enrolment - upload feed	Manual Task	<input type="checkbox"/>
Close period	Close Run	<input type="checkbox"/>
Open period	Open Run	
Create next process	Create Next Process	

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

Client Process Override
✔ Save
✖ Discard

Client: Helping Hands Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: N/A Settings

Step Name	Job Type	N/A
Check open run details	Initialise Process	
Client info received - Ready to process	Manual Task	<input type="checkbox"/>
DPS Notifications count check	DPS Check	<input type="checkbox"/>
Download DPS Notifications	Manual Task	<input type="checkbox"/>
Download AE Opt Outs	Manual Task	<input type="checkbox"/>
Enter data	Manual Task	<input checked="" type="checkbox"/>
Calculate payroll	Manual Task	<input type="checkbox"/>
Internal approval	Internal Approval	<input type="checkbox"/>
Upload review reports to myePayWindow	Manual Task	<input checked="" type="checkbox"/>
Client approval	Client Approval	<input type="checkbox"/>
Pay employees - submit payment files	Manual Task	<input type="checkbox"/>
Upload final reports to portal	Manual Task	<input type="checkbox"/>
Create Full Payment Submission	Manual Task	<input type="checkbox"/>
Submit Full Payment Submission	Send FPS	<input type="checkbox"/>
Upload payslips and P45s to myePayWindow	Empty Outbox	<input type="checkbox"/>
Empty myePayWindow Outbox	Manual Task	<input type="checkbox"/>
Auto Enrolment - generate notices and feeds	Manual Task	<input type="checkbox"/>
Auto Enrolment - upload feed	Manual Task	<input type="checkbox"/>
Close period	Close Run	<input type="checkbox"/>
Open period	Open Run	
Create next process	Create Next Process	

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.

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

Client Process Override Close

Client: 1 Frequency 4 Wkly Period 14 Default Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: Overview / Process Preview

Step Name	Job Type	User	Scheduled	Due
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Kate Bush	14-Apr-2022 08:00	19-Apr-2022 17:00
DPS Notifications count check	DPS Check		14-Apr-2022 08:00	19-Apr-2022 17:00
Download DPS 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 payroll	Manual Task	Kate Bush	14-Apr-2022 08:00	19-Apr-2022 17:00
Internal approval	Internal Approval		14-Apr-2022 08:00	19-Apr-2022 17:00
Upload review reports to myePayWindow	Manual Task	Kate Bush	14-Apr-2022 08:00	19-Apr-2022 17:00
Client approval	Client Approval		14-Apr-2022 08:00	19-Apr-2022 17:00
Pay employees - submit payment files	Manual Task	Kate Bush	19-Apr-2022 08:00	19-Apr-2022 17:00
Upload final reports to portal	Manual Task	Kate Bush	19-Apr-2022 08:00	21-Apr-2022 17:00
Create Full Payment Submission	Manual Task	Kate Bush	19-Apr-2022 08:00	21-Apr-2022 17:00
Submit Full Payment Submission	Send FPS		19-Apr-2022 08:00	21-Apr-2022 17:00
Upload payslips and P45s to myePayWindow	Empty Outbox		19-Apr-2022 08:00	21-Apr-2022 17:00
Empty myePayWindow Outbox	Manual Task	Kate Bush	19-Apr-2022 08:00	21-Apr-2022 17:00
Auto Enrolment - generate notices and feeds	Manual Task	Kate Bush	19-Apr-2022 08:00	22-Apr-2022 17:00
Auto Enrolment - 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
Create next process	Create Next Process		19-Apr-2022 08:00	22-Apr-2022 17:00

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

Client Process Override Save Discard

Client: 1 Frequency 4 Wkly Period 14 Default Process: Weekly - Paid Thursdays Group: Weekly - Thursday

View: Publish Details

Step Name	Job Type	Number Of Items	Overrides
Check open run details	Initialise Process		
Client info received - Ready to process	Manual Task		
DPS Notifications count check	DPS Check		
Download DPS Notifications	Manual Task		
Download AE Opt Outs	Manual Task		
Enter data	Manual Task		
Calculate payroll	Manual Task		
Internal approval	Internal Approval		
Upload review reports to myePayWindow	Manual Task		
Client approval	Client Approval		
Pay employees - submit payment files	Manual Task		
Upload final reports to portal	Manual Task		
Create Full Payment Submission	Manual Task		
Submit Full Payment Submission	Send FPS		
Upload payslips and P45s to myePayWindow	Empty Outbox	9	<input checked="" type="checkbox"/> Override
Empty myePayWindow Outbox	Manual Task		
Auto Enrolment - generate notices and feeds	Manual Task		
Auto Enrolment - upload feed	Manual Task		
Close period	Manual Task		
Open period	Open Run		
Create next process	Create Next Process		

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

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**:

Highlight a Client, select **Client Process Override**:

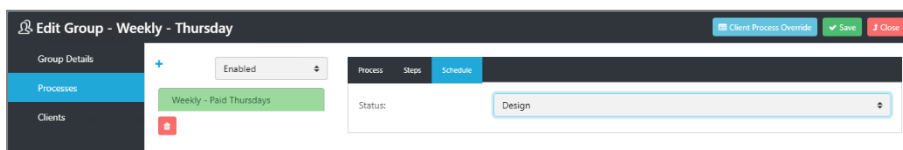
Step Name	Job Type	User	Scheduled	Due
Check open run details	Initialise Process			
Client info received - Ready to process	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
DPS Notifications count check	DPS Check		04-Oct-2021 08:00	05-Oct-2021 17:00
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Download AE Opt 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 payroll	Manual Task	Pat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Internal approval	Internal Approval	Mat Ternity	04-Oct-2021 08:00	05-Oct-2021 17:00
Upload review reports to myePayWindow	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 reports to portal	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Create Full Payment Submission	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Submit Full Payment Submission	Send FPS		05-Oct-2021 08:00	07-Oct-2021 17:00
Upload payslips and P45s to myePayWindow	Empty Outbox		05-Oct-2021 08:00	07-Oct-2021 17:00
Empty myePayWindow Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00
Auto Enrolment - generate notices and feeds	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
Create next process	Create Next Process		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.

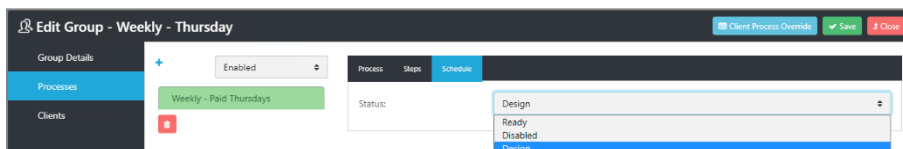
Initiating the Process schedule for live usage

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:



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



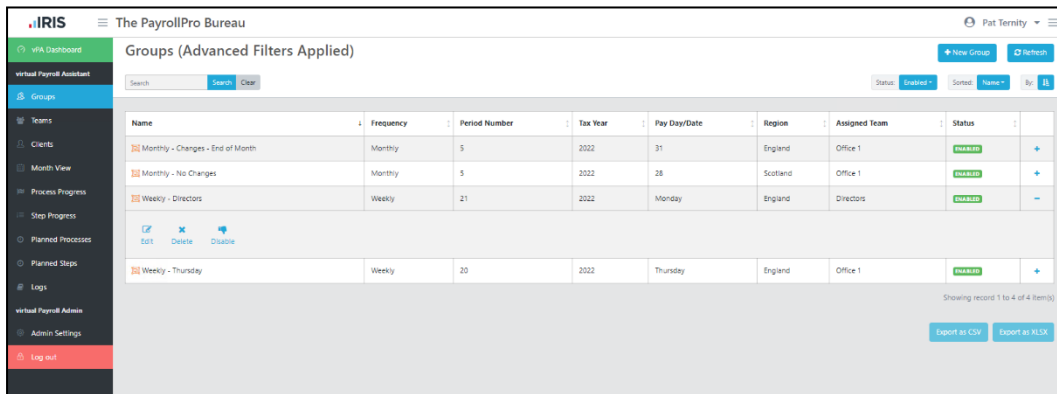
Click on **Save**, the process is now live.

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

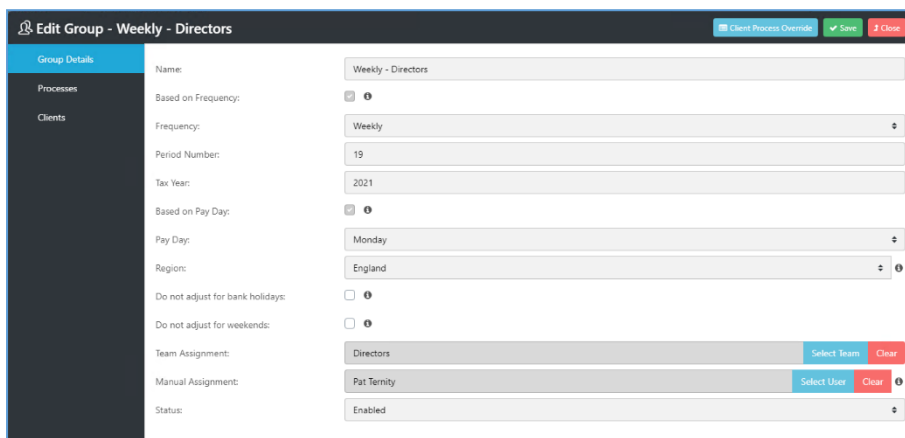
Editing existing groups

How to add a Client to an existing group

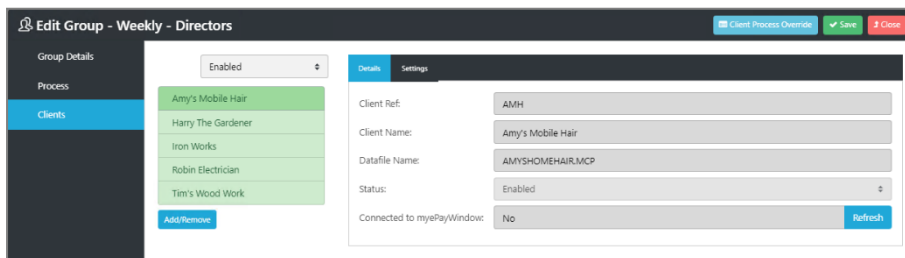
From the left menu **Groups** click on the '+' symbol for the group that you want to add a client to:



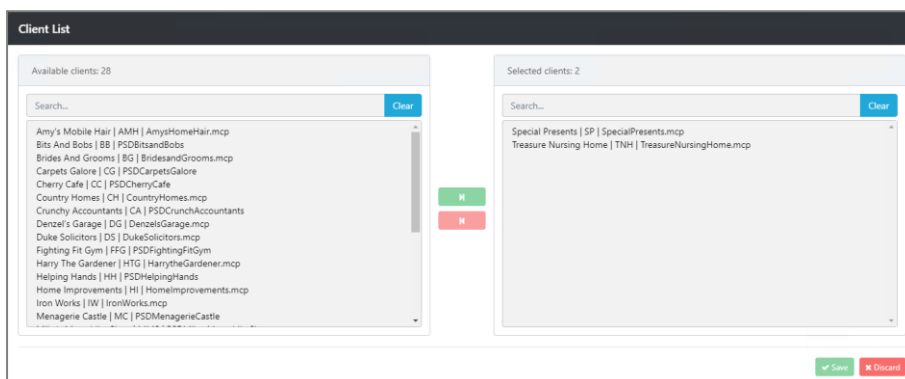
Click on **Edit**:



Select **Clients**:



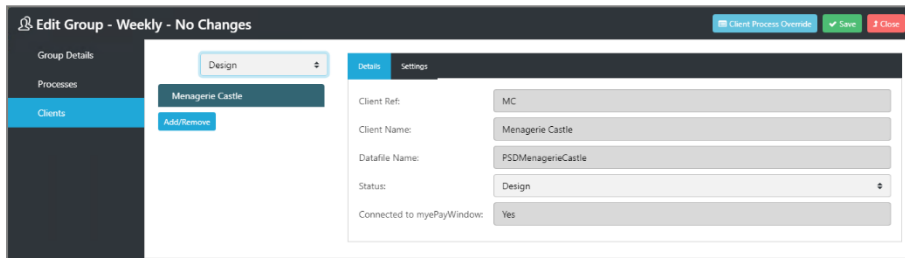
Click on **Add/Remove** to see the following screen:



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:



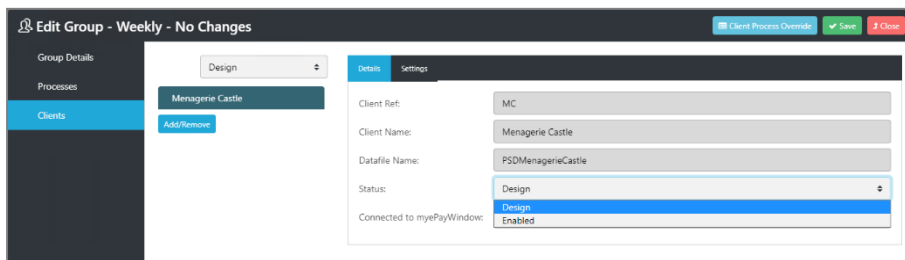
In design mode you can then customise the client level settings via Client Process Override and under the Settings tab for:

- 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:

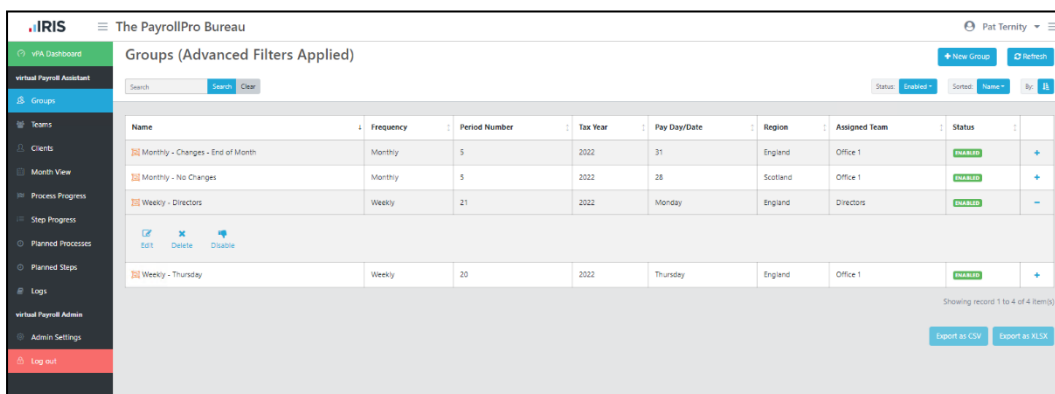


Click on **Save**.

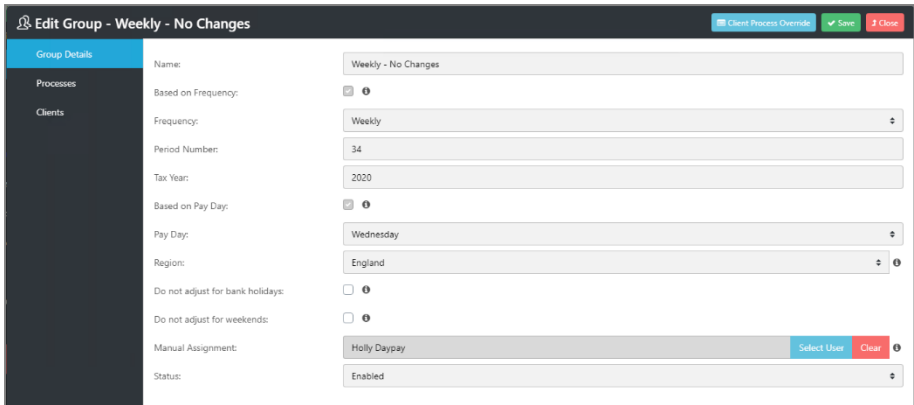
The clients first process will be created based on the Groups details for Frequency, Period Number and Tax Year.

How to disable a Client in an existing group

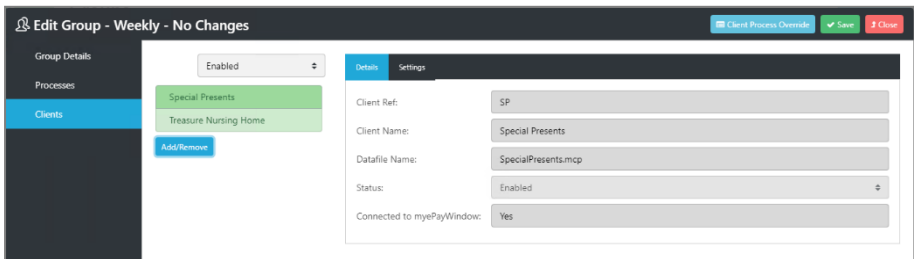
From the left menu **Groups** click on the '+' symbol for the group that you want to disable a client to:



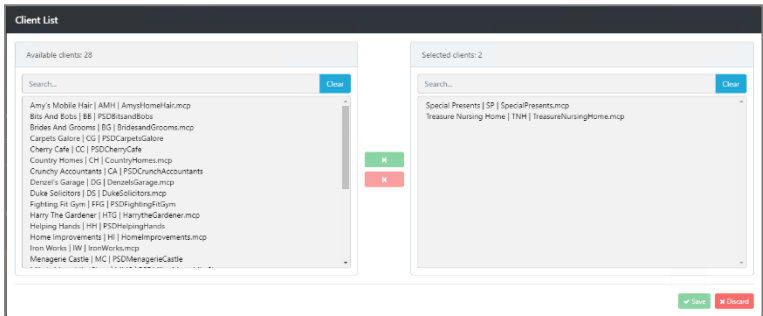
Click on **Edit**:




Select Clients:

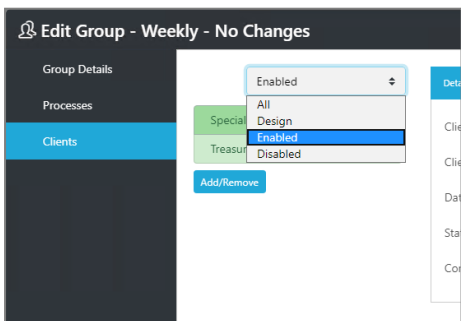


Click on **Add/Remove** to see the following screen:



Highlight the client under Selected clients to remove from the Group, then click on  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:



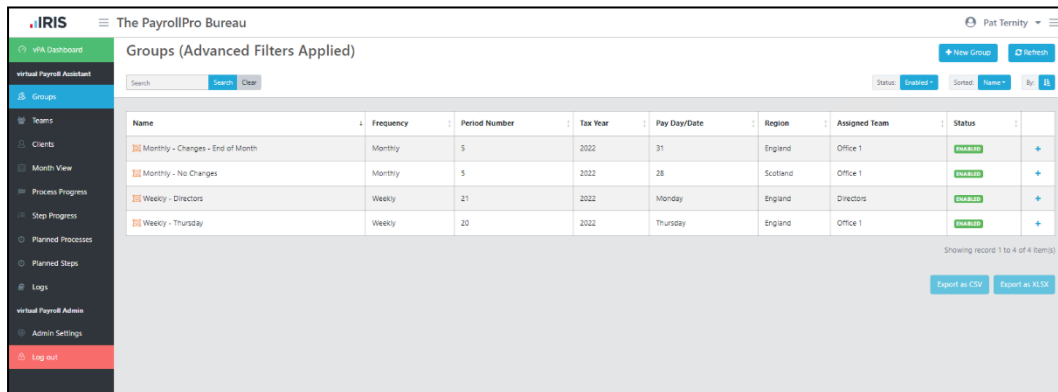
If the client did not have a process created for this group, they will be deleted from the group.

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

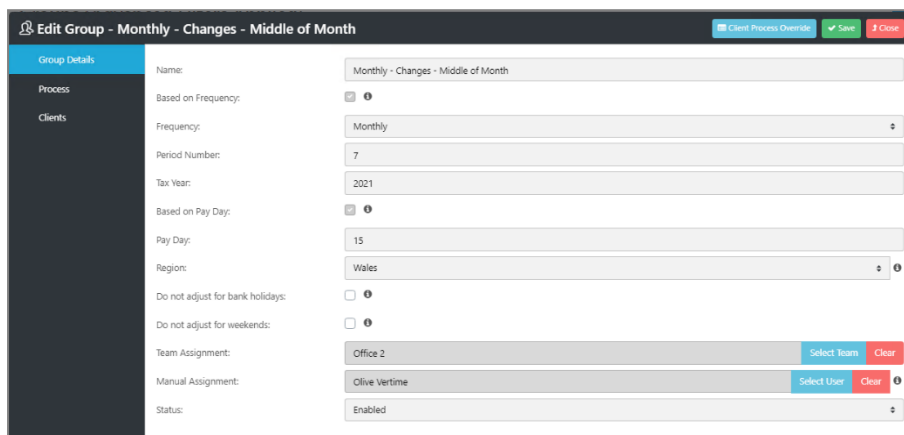
Please note that when the client is disabled and they have a process in progress, the process will stop from the next step that has not started.

How to reactivate a Client in an existing group

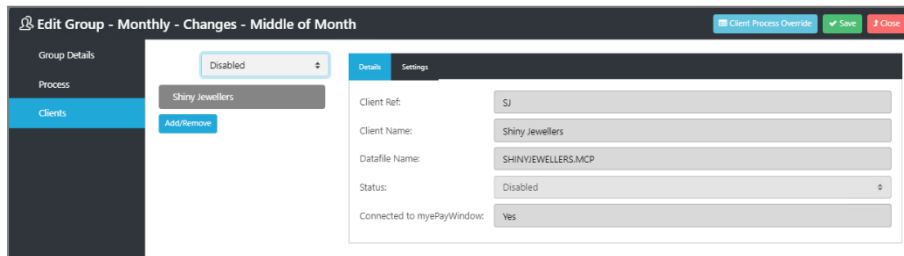
From the left menu **Groups** click on the '+' symbol for the group that you want to reactivate a client to:



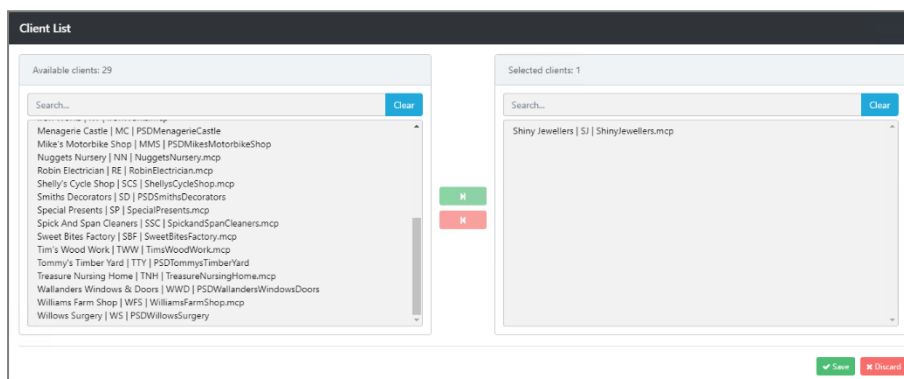
Click on **Edit**:



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

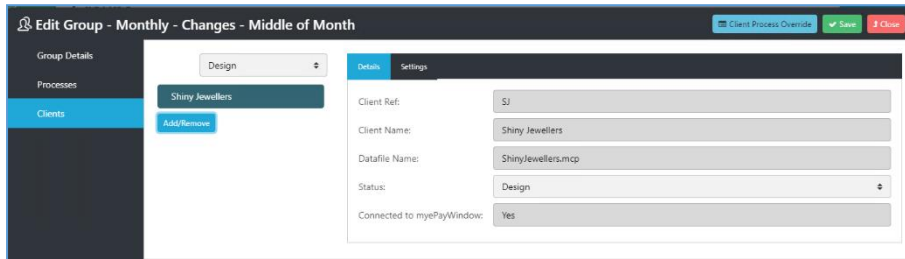


Click on **Add/Remove** to see the following screen:



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:



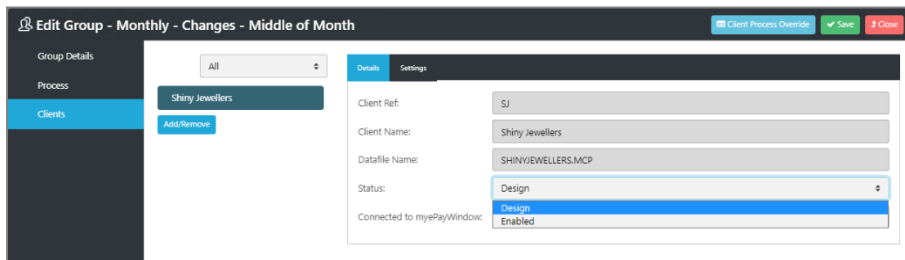
In design mode you can then review and customise these client level settings for:

- 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:



Click on **Save**.

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

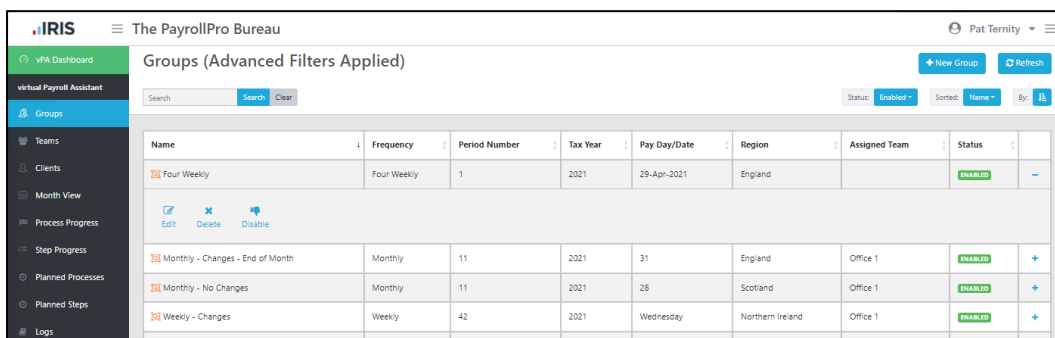
Modifying the steps

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:



Click on **Edit**:

Edit Group - Four Weekly Client Process Override Save Close

Group Details

Name: Four Weekly

Based on Frequency: ⓘ

Frequency: Four Weekly

Period Number: 1

Tax Year: 2021

Based on Pay Day: ⓘ

Pay Date: Select Pay Date
Apr 29, 2021

Region: England ⓘ

Do not adjust for bank holidays: ⓘ

Do not adjust for weekends: ⓘ

Team Assignment: Select Team Clear

Manual Assignment: Select User Clear ⓘ

Status: Enabled

Select **Process**:

Edit Group - Four Weekly Client Process Override Save Close

Process Steps Schedule

Enabled


Four Weekly

Name: Four Weekly

Status: Enabled

Based on Pay Day:

Manual Assignment: Select User Clear ⓘ

The click on the delete icon :

Delete process?

Are you sure you want to delete 'Four Weekly' ?

Delete Cancel

Select **Delete**.

Edit Group - Four Weekly Client Process Override Save Close

Process Steps Schedule

Enabled

+

Then **Save**.

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

Add process

Select the template to base your new process on and enter a name:

Selected template: Preview

Name:

Save 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
✘ Cancel

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

Process Preview (Process Payroll - Monthly) Close

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 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
Internal 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
Create next process	Create Next Process	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

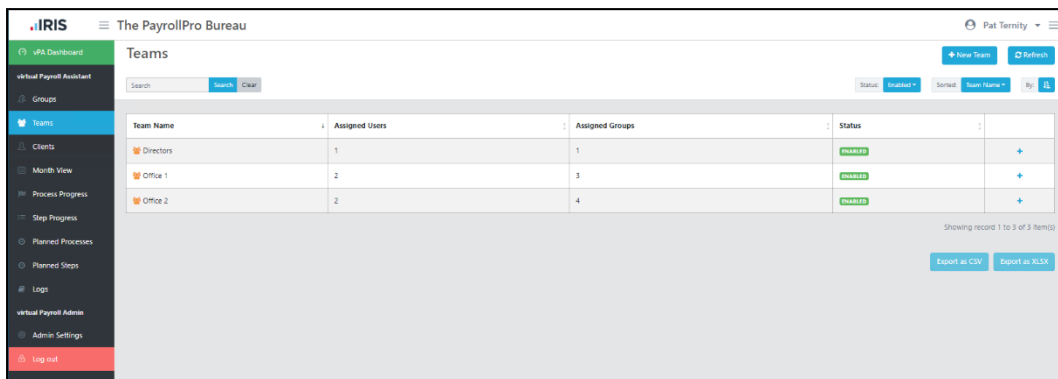
Action	Payroll Department Admin	vPA Supervisor	vPA Operator
Add Group	Yes	No	No
Delete Group	Yes	No	No
Team page	Yes	Yes	No
Add Team	Yes	No	No
Edit Team	Yes	No	No
Delete Team	Yes	No	No
View Team Only	No	Yes	No
Clients page	Yes	Yes	No
Groups page	Yes	Yes	a) Groups that have no Team assignment b) Groups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

Action	Payroll Department Admin	vPA Supervisor	vPA Operator
			that the user belongs to
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

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



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

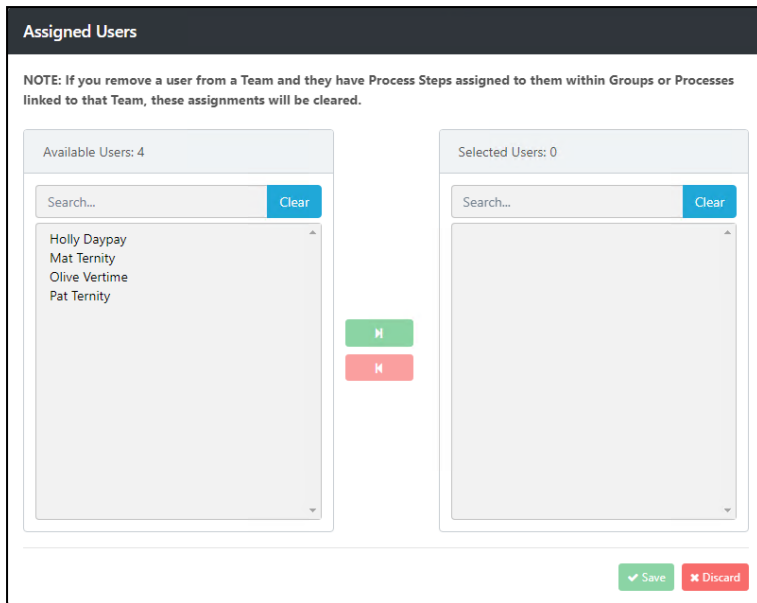
Add Team



Name:

Assigned Users: 0 Selected

Assigned Groups: 0 Selected

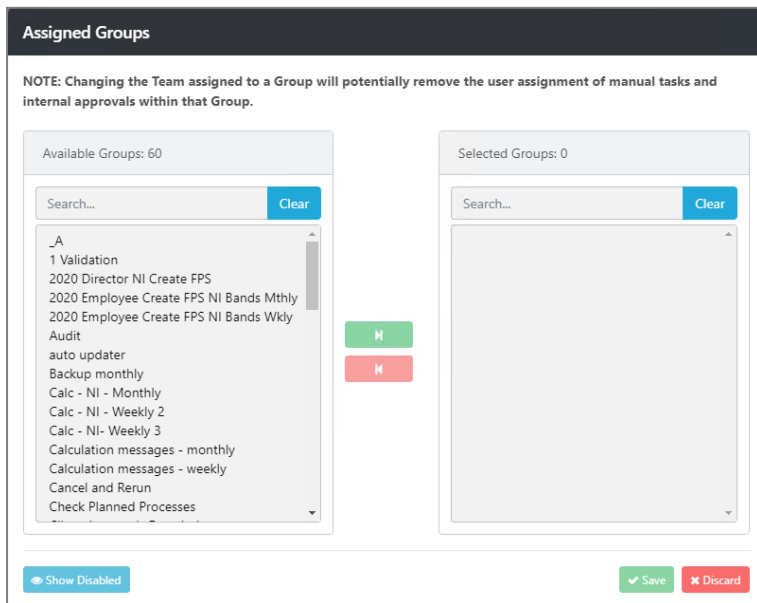
Enter a **Name** for the Team, then click on **View/Select Users**:





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:



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:

Teams

Search Search Clear

Status: Enabled Sorted: Team Name By: [icon]

Team Name	Assigned Users	Assigned Groups	Status	
Team Advanced	3	1	ENABLED	+
Team Apple	1	0	ENABLED	+
Team B	4	1	ENABLED	+
Team C	3	1	ENABLED	+
Team Directors	2	0	ENABLED	+
Team myepaywindow	1	1	ENABLED	+

Showing record 1 to 6 of 6 item(s)

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

Teams

Search Search Clear

Status: Enabled Sorted: Team Name By: [icon]

Team Name	Assigned Users	Assigned Groups	Status	
Team Advanced	3	1	ENABLED	+
Team Apple	1	0	ENABLED	-
<div style="display: flex; gap: 10px;"> [Pencil] Edit [X] Delete [Power] Disable </div>				
Team B	4	1	ENABLED	+
Team C	3	1	ENABLED	+
Team Directors	2	0	ENABLED	+
Team myepaywindow	1	1	ENABLED	+

Showing record 1 to 6 of 6 item(s)

Click on **Delete**:

Delete Team?
✕

Are you sure you want to delete the team **Team Apple**?

✔ Delete
✕ Cancel

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:

API Call Failed
✕

This team cannot be deleted as a process with this team assigned to it has already been created. If you want to stop this team from being used in the future, change its status to disabled.

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:

Teams

Search Search Clear

Status: Enabled Sorted: Team Name By

Team Name	Assigned Users	Assigned Groups	Status	
Team Advanced	3	1	ENABLED	+
Team Apple	1	0	ENABLED	+
Team B	4	1	ENABLED	+
Team C	3	1	ENABLED	+
Team Directors	2	0	ENABLED	+
Team myepaywindow	1	1	ENABLED	+

Showing record 1 to 6 of 6 item(s)

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

Teams

Search Search Clear

Status: Enabled Sorted: Team Name By

Team Name	Assigned Users	Assigned Groups	Status	
Team Advanced	3	1	ENABLED	+
Team Apple	1	0	ENABLED	-
<p>Edit Delete Disable</p>				
Team B	4	1	ENABLED	+
Team C	3	1	ENABLED	+
Team Directors	2	0	ENABLED	+
Team myepaywindow	1	1	ENABLED	+

Showing record 1 to 6 of 6 item(s)

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.

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**:

Team Name	Assigned Staff	Assigned Groups	Status
Team A	3	2	ENABLED
Team Advanced	2	0	ENABLED
Team B	3	0	ENABLED
Team C	3	1	ENABLED
Team D	1	0	ENABLED
Team Directors	2	0	ENABLED

Select **My Teams**, then **Apply**:

Team Name	Assigned Staff	Assigned Groups	Status
Team A	3	2	ENABLED
Team Advanced	2	0	ENABLED
Team C	3	1	ENABLED

Or select **All Teams** then **Apply**.

Groups page

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

Name	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 Advanced filters allow filtering on:

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

Name	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

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] [Cancel]

Enter a name for the group, and specify whether you want it to be based on Pay Day and/or Frequency. Note that if the group is set to be based on Pay Day then it is required to also be based on Frequency.

Name:

Based on Frequency: ⓘ

Frequency:

Period Number:

Tax Year:

Based on Pay Day: ⓘ

Pay Day:

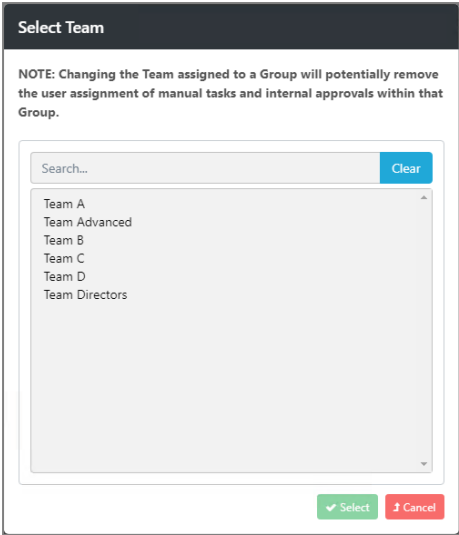
Region: ⓘ

Do not adjust for bank holidays: ⓘ

Do not adjust for weekends: ⓘ

Team Assignment: Select Team Clear

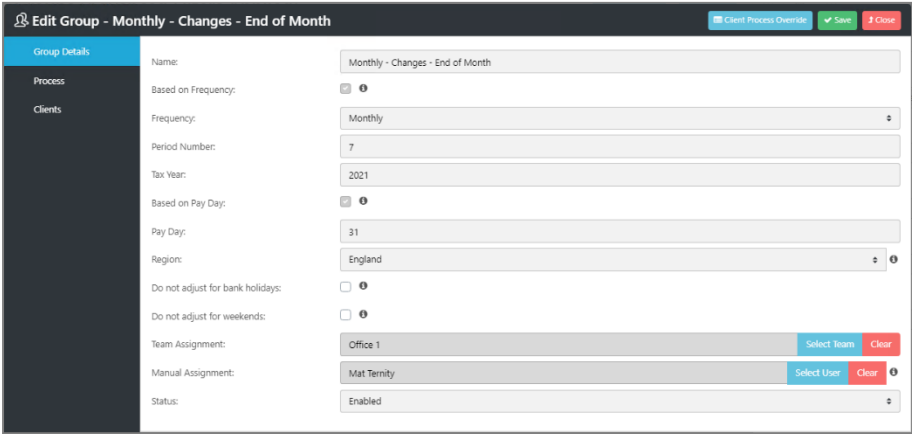
Click on **Select Team**:



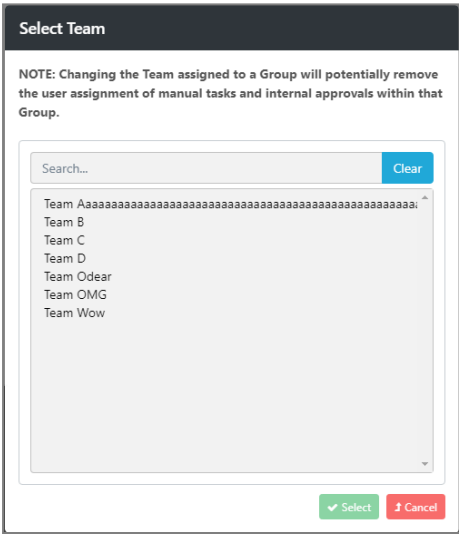
Highlight the team then click on **Select**.

Group Edit

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



Next to **Team Assignment** click on **Select Team**:



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:

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Hary The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	Running	45
Hary The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	12-Aug-2022 08:30	19-Aug-2022 08:31	Directors	Completed	100
Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	Running	55
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
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	12
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	17
Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	20	2022	11-Aug-2022 08:30	18-Aug-2022 08:31	Directors	Completed	100

Team is available under Advanced Filters:

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Spick 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	48
Spick 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
Nuggets Nursery (NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep-2021 17:25	01-Oct-2021 11:23	Office 1	Running	76
Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	27-Sep-2021 17:25	01-Oct-2021 11:23	Office 1	Running	76
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	01-Oct-2021 11:22	Office 1	Running	76
Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:26	01-Oct-2021 11:22	Office 1	Running	76
Brides 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	1
Brides 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
Home Improvements (HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep-2021 17:28	01-Oct-2021 11:13	Office 1	Running	43
Mike's Motorbike Shop (PSDMikesMotorbikesShop)	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	1

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:

Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status
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
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
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
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	15-Aug-2022 08:00	19-Aug-2022 17:00	Weekly	20	2022	Office 1	ACTIVE
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
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
Crunchy Accountants (PSDCrunchyAccountants)	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
Smiths Decorators (PSDSmithsDecorators)	Monthly - No Changes	Monthly - No Changes	17-Aug-2022 08:00	05-Sep-2022 17:00	Monthly	5	2022	Office 1	ACTIVE

Team is available under **Advanced Filters**:

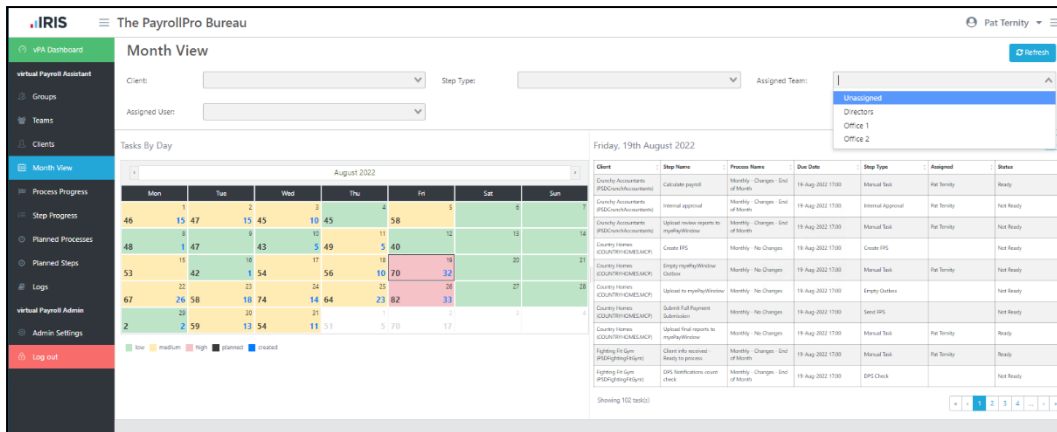
Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status
Crunchy Accountants (PSDCrunchyAccountants)	Monthly - Changes - End of Month	Monthly - Changes - End of Month	15-Sep-2021 08:00	04-Oct-2021 17:00	Monthly	6	2021	Office 1	ACTIVE
Mike'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
Smiths Decorators (PSDSmithsDecorators)	Monthly - No Changes	Monthly - No Changes	15-Sep-2021 08:00	06-Oct-2021 17:00	Monthly	6	2021	Office 1	ACTIVE
Shelly's Cycle Shop (SHELLYSCYCLES.HOP.MCP)	Monthly - No Changes	Monthly - No Changes	16-Sep-2021 08:00	05-Oct-2021 17:00	Monthly	6	2021	Office 1	ACTIVE
Menagerie Castle (PSDMenagerieCastle)	Monthly - No Changes	Monthly - No Changes	17-Sep-2021 08:00	06-Oct-2021 17:00	Monthly	6	2021	Office 1	ACTIVE
Tommy'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

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:

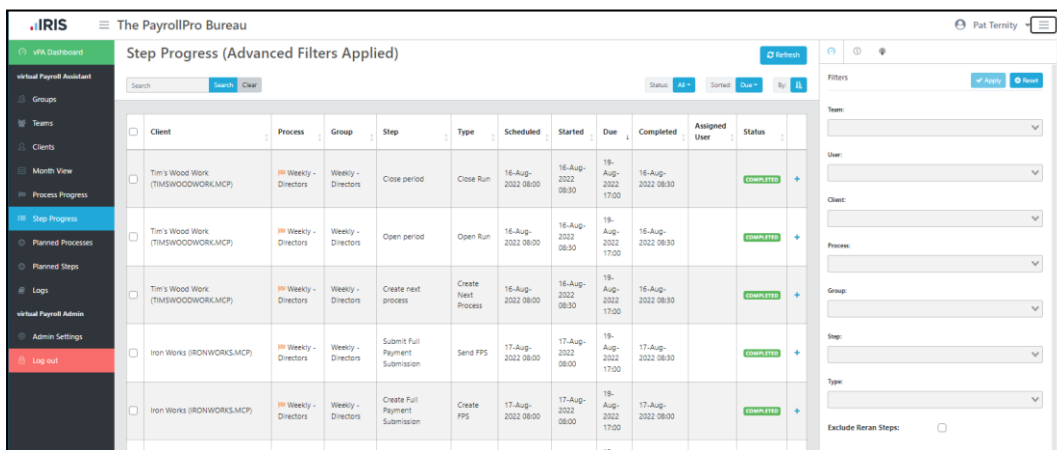


Select the drop down for Assigned Team to select one or more available from the list, they will then be used to filter the records.

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**:



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

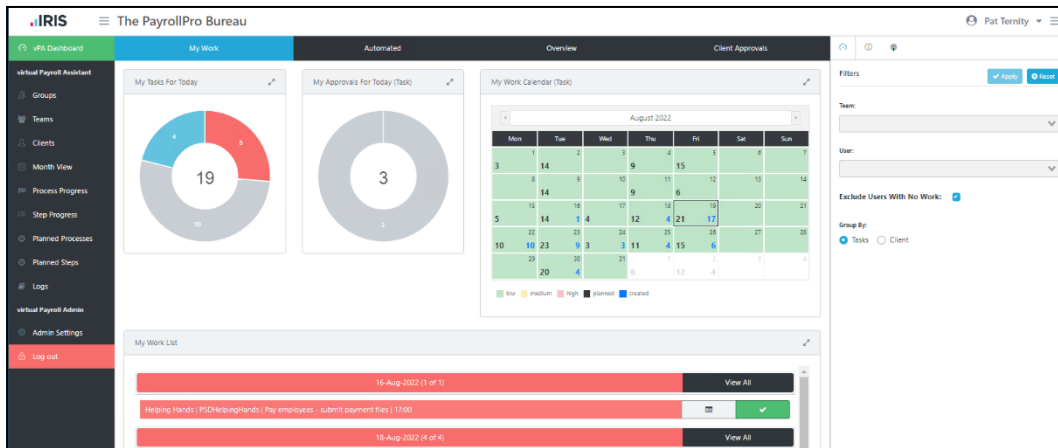
Team is available under **Advanced Filters**:

Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status
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
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
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
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	15-Aug-2022 08:00	19-Aug-2022 17:00	Weekly	20	2022	Office 1	ACTIVE
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
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
Counchy Accountants (PSDCounchAccountants)	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
	Monthly - No Changes	Monthly - No Changes	17-Aug-2022 08:00	05-Sep-2022 17:00	Monthly	5	2022	Office 1	ACTIVE

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

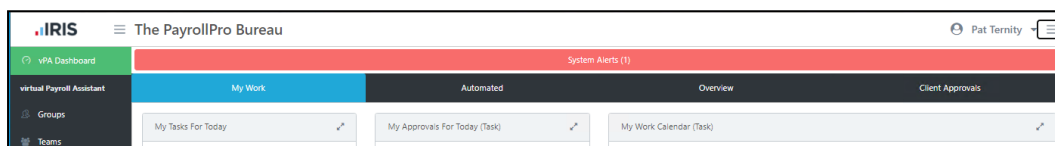
vPA website

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)

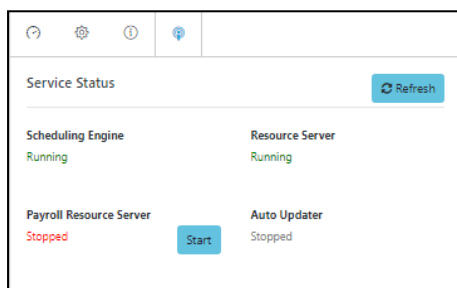
When you see a **System Alert**:



Click on the row to see details regarding the alert:



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**:

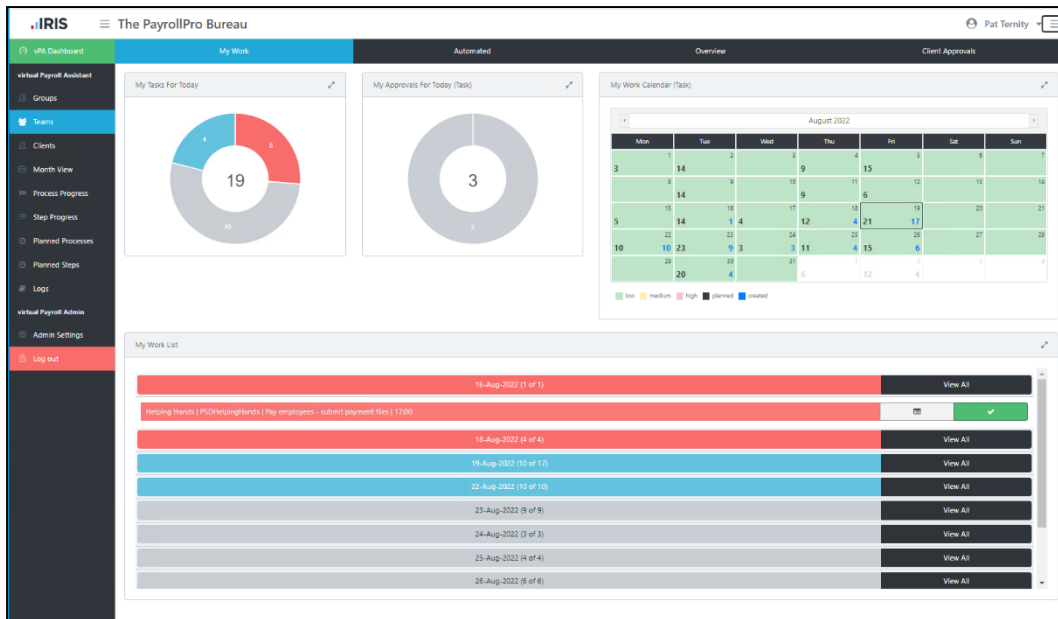


Then click on **Start**, give vPA a few minutes to restart the service then select **Refresh** to ensure the service is running again.

Monitoring progress

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

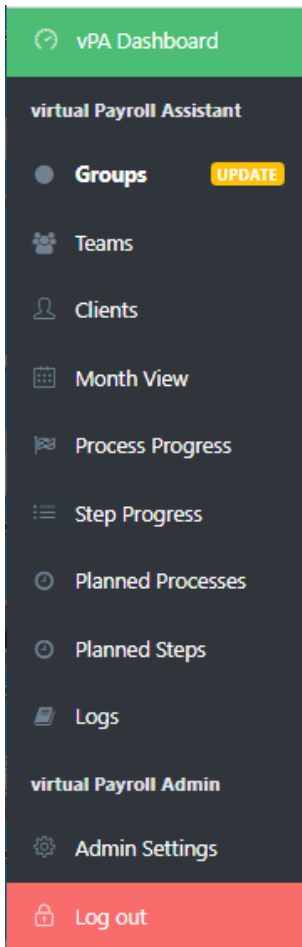
- Your own work under the **My Work** tab
- Automated steps progress for all clients payrolls due today under the **Automated** tab
- An overview of manual tasks for all client payrolls due today by user under the **Overview** tab
- See the progress of Client Approvals due by today for all clients under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



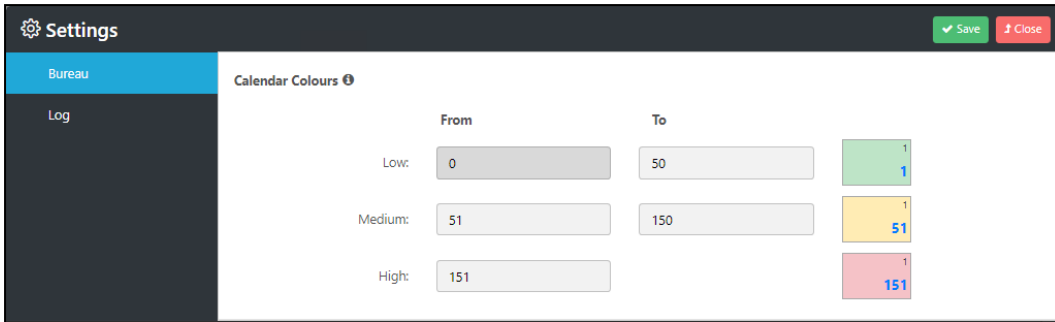
Under each of the tabs you can click on the charts to drill down to see details 'list' information.

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**:



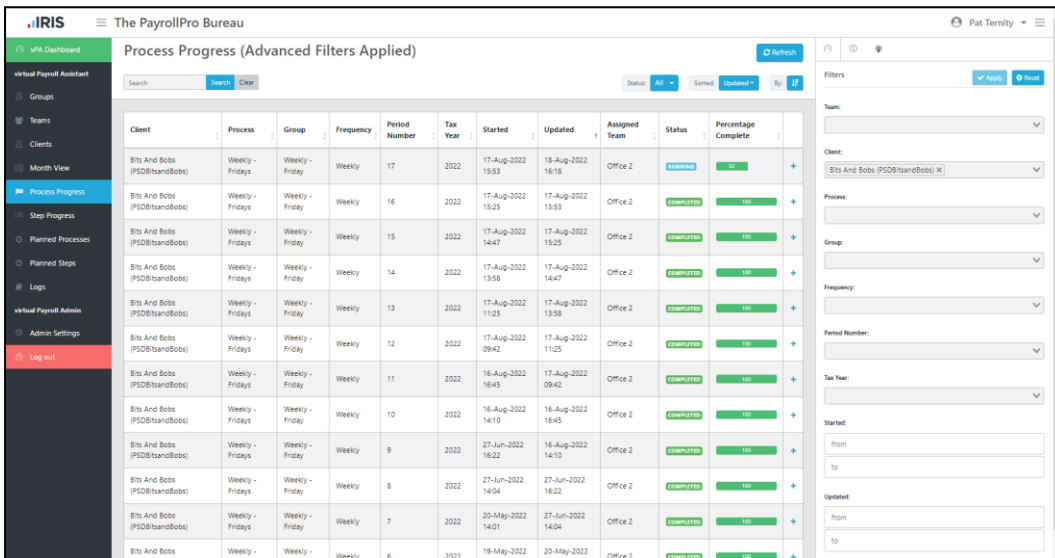
These settings change the colours shown on the following calendars based on the number of tasks (or client, if selected under Filters):

- 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)

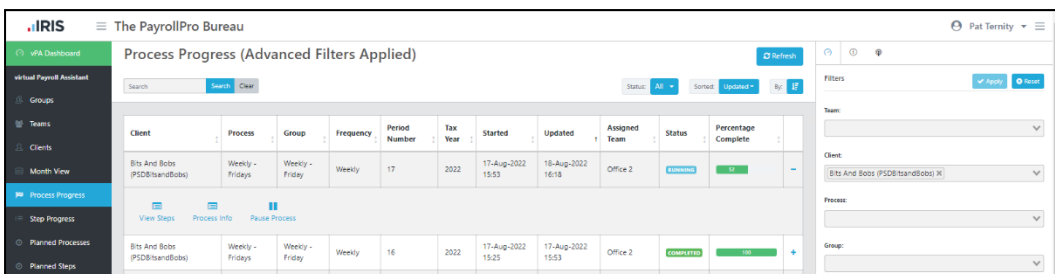
Once you have defined the Low, Medium, and High values, click on **Save**.

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:



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



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

Weekly - Fridays - Details Close

General Details Properties 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

Weekly - Fridays - Details Close

General Details 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

Weekly - Fridays - Details Close

General Details Properties Notes

Group Name: Weekly - Friday

Client Ref: BB

Client Name: Bits And Bobs

Datafile Name: PSDBitsandBobs

Data ID: 16

Notes tab

Weekly - Fridays - Details Close

General Details Properties Notes

By: Author: Type:

Step Approval
Olive Vertime
01-Oct-2021 11:10

(internal approval Approved) - checked

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

Bits And Bobs - Weekly - Fridays (Weekly - Friday) Refresh Actions Close

Frequency: Weekly Period Number: 26 Tax Year: 2021

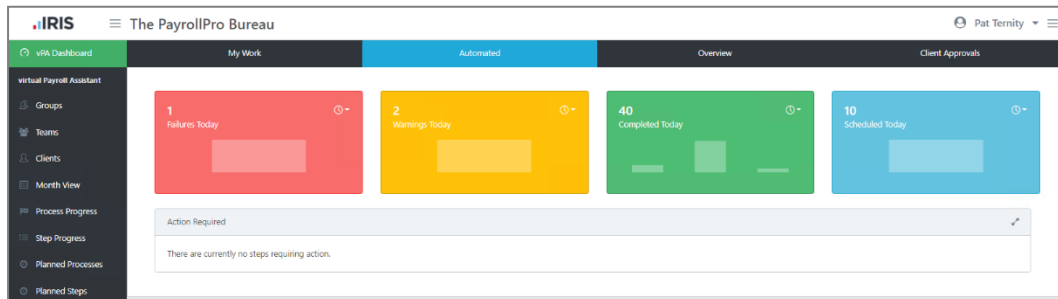
Step Name	Job Type	User	Scheduled	Started	Due	Completed
Check open run details	Initialise Process			27-Sep-2021 17:21		27-Sep-2021 17:23
Client info received - Ready to process	Manual Task	Holly Daypay	28-Sep-2021 08:00	28-Sep-2021 08:00	29-Sep-2021 17:00	01-Oct-2021 11:02

- View Process Info
- Show Reran Steps
- Pause Process
- Cancel Process
- 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**:



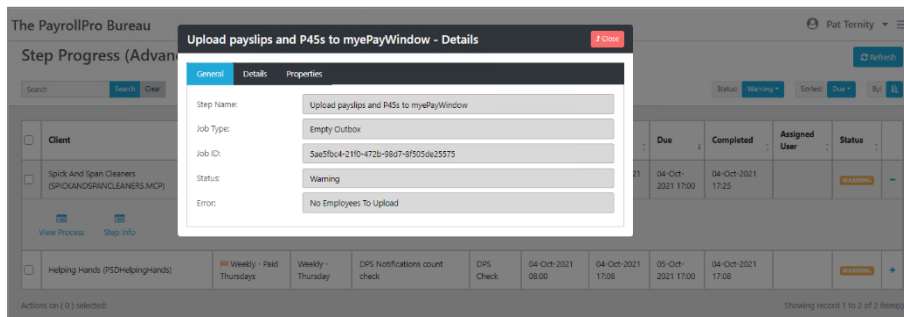
Click on the **Warnings** widget and you will be taken to the **Step Progress** screen which will be prefiltered to show the steps with Warnings:

Step Progress (Advanced Filters Applied)

Client	Process	Group	Step	Type	Scheduled	Started	Due	Completed	Assigned User	Status
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Weekly - 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)	Weekly - 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.

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(Iif(IsNull([Type]),0,[Type])+1,'UNKNOWN','Calculation','Submissions') AS [Program Area], Choose(Iif(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 [PayrollRuns] ON CLng([tblProcessMessages].[LinkedID]) = [PayrollRuns].[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.

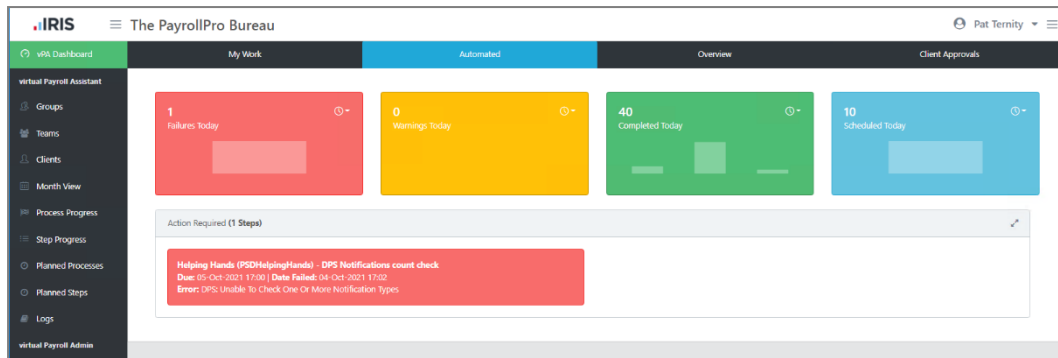
Open Run

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:

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 re-run 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.
- 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](#)).

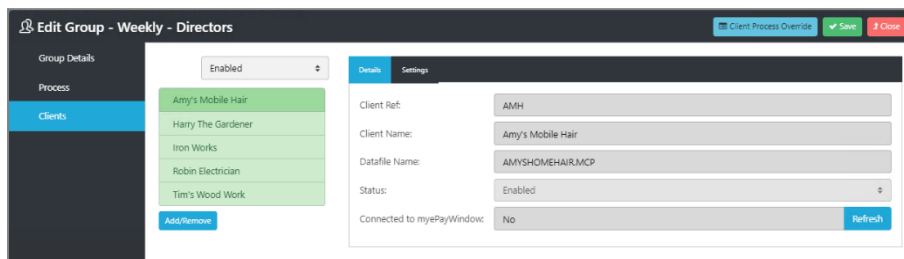
Create Report

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**:



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**).

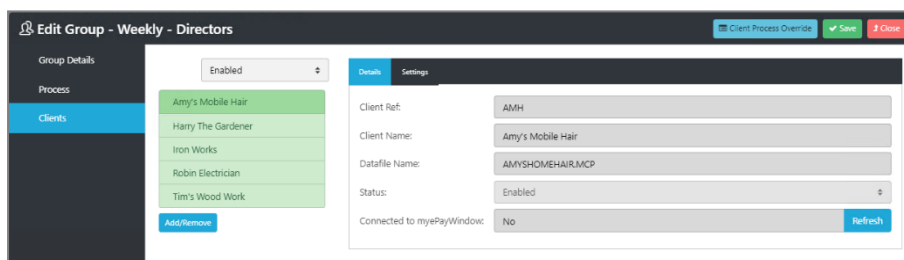
Empty Outbox

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**:



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.

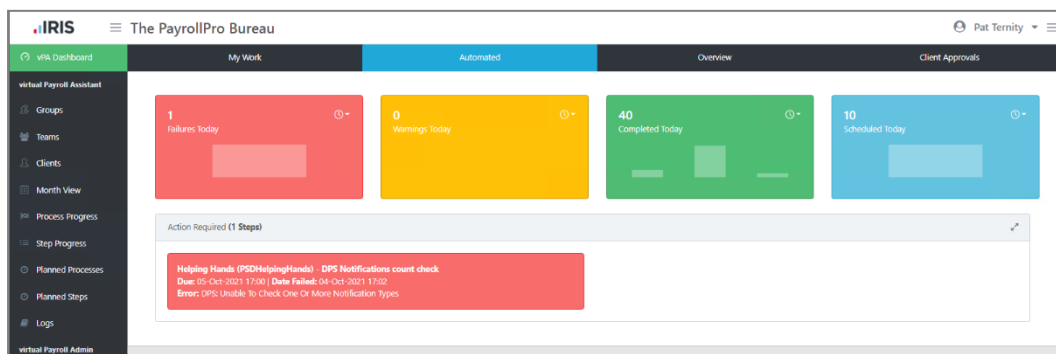
Once you have resolved the cause you can either rerun the step (refer to the section [How to rerun process step\(s\) for a client](#)).

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**:



Under the section **Action Required**, click on the tile:

Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details - Initialise Process	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

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

Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details - Initialise Process	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
<div style="border: 1px solid #ccc; padding: 2px;"> ⏪ Rerun 📄 Step Info </div>							
Download DPS Notifications	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY

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

DPS Notifications count check - Details Close

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**:

Rerun DPS Notifications count check? Rerun Cancel

Are you sure you want to rerun DPS Notifications count check?

Show Advanced Options

Select **Show Advanced Options**:

Rerun DPS Notifications count check? Rerun Cancel

Are you sure you want to rerun DPS Notifications count check?

Emergency Override: Using Emergency Override may adversely affect other steps in the process. This should only be used as a last resort.

Emergency Override Reason...

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: Using Emergency Override may adversely affect other steps in the process. This should only be used as a last resort.

Downloaded the notifications via IPP

Hide Advanced Options

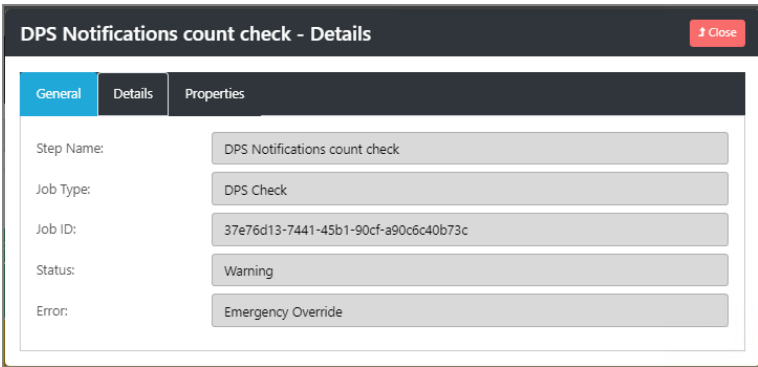
Then select **Rerun**:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday) Refresh Actions Close

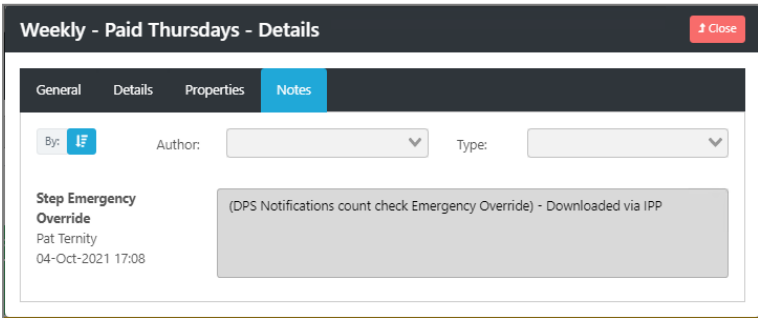
Frequency: Weekly Period Number: 27 Tax Year: 2021

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:



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



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**:

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	ERROR	12
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
Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	ERROR	21
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 16:53	18-Aug-2022 16:16	Office 1	ERROR	18
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	ERROR	10
Amy's Mobile Hair (AMYSMOBILEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022 08:30	18-Aug-2022 08:31	Directors	ERROR	0

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 (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated * By: IF

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	13
<p>View Steps Process Info Pause Process</p>										
Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	01-Oct-2021 11:39	04-Oct-2021 15:24	Office 2	FINISHED	76

Now click on **View Steps**:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday) Refresh Actions Close

Frequency: Weekly Period 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	NULL +
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	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 +
Create next process	Create Next Process		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY +

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):

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday) Refresh Actions Close

Frequency: Weekly Period 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 -
<input type="button" value="Rerun"/> <input type="button" value="Step Info"/>							
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	NULL +
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 15:41	05-Oct-2021 17:00		READY +

Click **Rerun**, the following message is displayed:

Rerun DPS Notifications count check? Rerun Cancel

Rerunning DPS Notifications count check will mean that all steps from DPS Notifications count check up to and including Download AE Opt Outs will be re run.

The step Download AE Opt Outs will also be signed off and marked as failed.

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 ✖ Cancel

Are you sure you want to rerun Download AE Opt Outs?

Edit Details:

Manual Assignment: Select User Clear

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

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		05-Oct-2021 17:00		NOT 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	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
Create next process	Create Next Process		05-Oct-2021 08:00		08-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**:

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 14:52	05-Oct-2021 17:00	04-Oct-2021 14:53	RE-RAN
Enter data	Manual Task	Pat Ternity	04-Oct-2021 08:00	04-Oct-2021 14:53	05-Oct-2021 17:00	04-Oct-2021 15:41	RE-RAN
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	RE-RAN
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	RE-RAN
Download AE Opt Outs	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT 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

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**:

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	FAILED	42
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
Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	INCOMPLETE	25
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	INCOMPLETE	38
Country Homes (COUNTRYHOMES.MCP)	Monthly - No Changes	Monthly - No Changes	Monthly	5	2022	16-Aug-2022 17:01	15-Aug-2022 16:06	Office 1	INCOMPLETE	57
Amy's Mobile Hair (AMYSHOMEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022 08:30	18-Aug-2022 08:31	Directors	INCOMPLETE	11
						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:

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	0
Helping Hands (PSDHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 16:49	Office 1	INCOMPLETE	33

Click on **View Steps**:

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 Verlime	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED
Upload review reports to myPayWindow	Manual Task	Holly Daypay	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):

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
<input type="button" value="Rerun"/> <input type="button" value="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 Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		CANCELLED

Click **Rerun**, the following message is displayed:

Are you sure you want to rerun Client info received - Ready to process?

Edit Details:

To proceed click **Rerun**.

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
Download DPS Notifications	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		NOT READY
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**:

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	RERUN
Client info received - Ready to process	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE
DPS Notifications count check	DPS Check		01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE
Download DPS Notifications	Manual Task	Holly Daypay	01-Oct-2021 08:00		04-Oct-2021 17:00		OVERDUE
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 Daypay	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 [Resume paused process but rerun previously completed steps](#).

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 Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: IF

Client	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	RUNNING	0	+
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	+

Showing record 1 to 2 of 2 item(s)

Filters Apply Reset

Teams:

Client:

Process:

Group:

Frequency:

Period Number:

Tax Year:

Started:

Updated:

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

Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: IF

Client	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	RUNNING	0	-
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	+

Showing record 1 to 2 of 2 item(s)

[View Steps](#) [Process Info](#) [Pause Process](#)

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

Pause Process

You must enter a reason for pausing the process (maximum number of characters - 250).

Pause Reason...

Note: If there is an automated step which has already started running, that step will continue until it has reached its conclusion, even if the process is paused.

Confirm Back

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:

Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: [icon]

Client	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	0	-
<div style="display: flex; justify-content: space-between; align-items: center;"> View Steps Process Info Resume Process </div>											
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	+

Showing record 1 to 2 of 2 item(s)

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
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 (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: [icon]

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	50	+
Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	01-Oct-2021 11:39	04-Oct-2021 15:24	Office 2	PAUSED	75	-
<div style="display: flex; justify-content: space-between; align-items: center;"> View Steps Process Info Resume Process </div>											
Spick And Span Cleaners	Weekly - Changes	Weekly -	Weekly	26	2021	01-Oct-2021	04-Oct-2021	Office 1	RUNNING	70	+

Click on **View Steps**:

Willows Surgery - Weekly - Fridays (Weekly - Friday) Refresh Actions Close

Frequency: Period Number: Tax Year:

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	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-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	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-2021 11:42	29-Sep-2021 17:00	01-Oct-2021 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	Empty Outbox		29-Sep-2021 08:00	04-Oct-2021 15:24	01-Oct-2021 17:00	04-Oct-2021 15:24	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 - generate notices and feeds	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 +
Create next process	Create Next Process		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:

Willows Surgery - Weekly - Fridays (Weekly - Friday) Refresh Actions Close

Frequency: Period Number: Tax Year:

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	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-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	Manual Task	Holly Daypay	28-Sep-2021 08:00	01-Oct-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 ✗ Cancel

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 - submit payment files will be re run.

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:

Groups (Advanced Filters Applied)								+ New Group	Refresh
Search <input type="text"/> Search Clear		Status: Enabled		Sorted: Name		By: [icon]			
Name	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 - Changes - Middle of Month	Monthly	7	2021	15	Wales	Office 2	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 - 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	-	

[Edit](#) [Delete](#) [Disable](#)

Showing record 1 to 8 of 8 item(s)

Select **Edit**:

Edit Group - Weekly - Thursday Client Process Override Save Close

Group Details

Name:

Based on Frequency:

Frequency:

Period Number:

Tax Year:

Based on Pay Day:

Pay Day:

Region:

Do not adjust for bank holidays:

Do not adjust for weekends:

Team Assignment: Select Team Clear

Manual Assignment: Select User Clear

Status:

Highlight **Clients** on the left menu:

Edit Group - Weekly - Thursday Client Process Override Save Close

Group Details

Process

Clients

Helping Hands

Williams Farm Shop

[Add/Remove](#)

Details **Settings**

Client Ref:

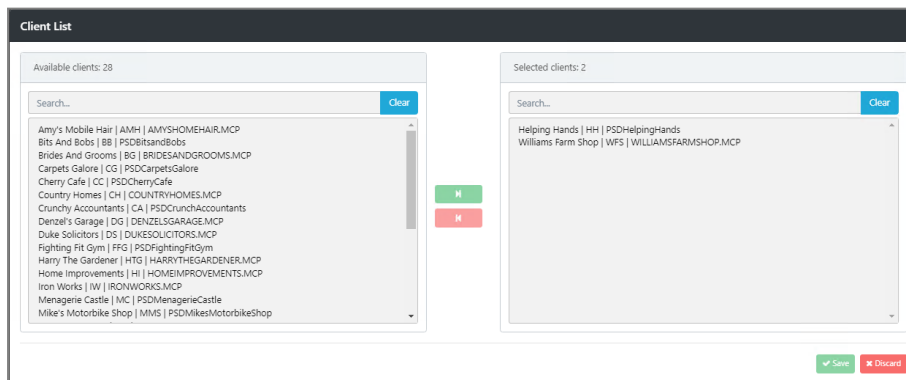
Client Name:


Datafile Name:

Status:

Connected to myePay/Window:

Now select **Add/Remove**:



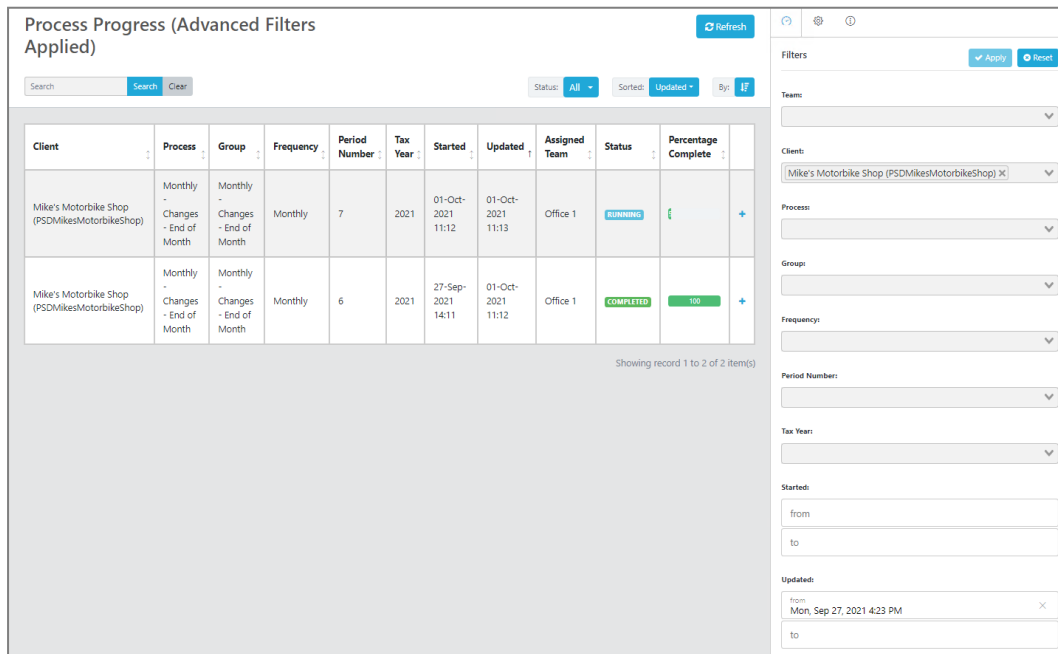
Highlight the client under Selected clients that you want to disable, and click on , then select **Save**.

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:



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

Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sort: Updated By: IP

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Mike'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	-
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

Showing record 1 to 2 of 2 item(s)

[View Steps](#) [Process Info](#) [Pause Process](#)

Filters Apply Reset

Team:

Client:

Process:

Group:

Frequency:

Period Number:

Tax Year:

Started:

Updated:

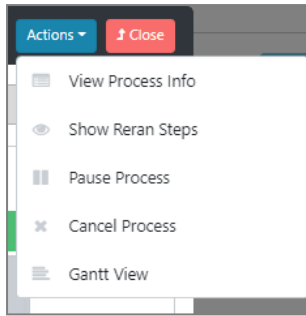
Select **View Steps**:

Mike's Motorbike Shop - Monthly - Changes - End of Month (Monthly - Changes - End of Month) Refresh Actions Close

Frequency: Period Number: Tax Year:

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 - generate notices and feeds	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
Create next process	Create Next Process		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:

A screenshot of a 'Cancel Process' dialog box. The title bar reads 'Cancel Process'. Below the title bar, there is a message: 'You must enter a reason for cancelling the process (maximum number of characters - 250)'. Below this message is a large text input field with the placeholder text 'Cancellation Reason...'. At the bottom right of the dialog box, there are two buttons: a green 'Confirm' button with a checkmark icon and a red 'Back' button with a left-pointing arrow icon.

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**:

Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			01-Oct-2021 11:12		01-Oct-2021 11:12	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 +
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 - generate Manual Task notices and feeds	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 +
Create next process	Create Next Process		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:

Step Name	Job Type	User	Scheduled	Started	Due	Completed	Status
Check open run details	Initialise Process			01-Oct-2021 11:12		01-Oct-2021 11:12	COMPLETED +
Client info received - Ready to process	Manual Task	Mat Ternity	14-Oct-2021 08:00		15-Oct-2021 17:00		NOT READY -

Step Info Run Early Edit Step

Click Run Early:

Run Client info received - Ready to process Early

Action:

Run When:

You must also enter a reason for running this step early (maximum number of characters - 250).

Run Early Reason...

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 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

• **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:

Step Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: Overdue - Sorted: Due - By: [icon]

<input type="checkbox"/>	Client	Process	Group	Step	Type	Scheduled	Started	Due	Completed	Assigned User	Status	
<input type="checkbox"/>	Nuggets Nursery (NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Internal approval	Internal Approval	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	+
<input type="checkbox"/>	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	+
<input type="checkbox"/>	Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Calculate payroll	Manual Task	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	+
<input type="checkbox"/>	Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Internal approval	Internal Approval	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	+
<input type="checkbox"/>	Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Upload review reports to myePayWindow	Manual Task	30-Sep-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	+
<input type="checkbox"/>	Cherry Cafe (PSDCherryCafe)	Weekly - Changes	Weekly - Changes	Pay employees - submit payment files	Manual Task	01-Oct-2021 08:00		01-Oct-2021 17:00		Mat Ternity	OVERDUE	+

Actions on (0) selected: Showing record 1 to 6 of 6 item(s)

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:

Reassign User for selected tasks

Search... Clear

- Pat Ternity
- Holly Daypay
- Mat Ternity
- Olive Vertime

Select None Select Cancel

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:

Weekly Work Breakdown (Task)

Week Starting: Sun, 3rd Oct 2021 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	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
Total	0	18	27	10	19	4	0	78

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:

Step Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Desc By: All

<input type="checkbox"/>	Client	Process	Group	Step	Type	Scheduled	Started	Due	Completed	Assigned User	Status	
<input type="checkbox"/>	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+
<input type="checkbox"/>	Bits And Bobs (PSDBitsandBobs)	Weekly - 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	READY	+
<input type="checkbox"/>	Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+
<input type="checkbox"/>	Willows Surgery (PSDWillowsSurgery)	Weekly - 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	+
<input type="checkbox"/>	Special Presents (SPECIALPRESENTS.MCP)	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	NOT READY	+
<input type="checkbox"/>	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	NOT READY	+
<input type="checkbox"/>	Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Create Full Payment Submission	Manual Task	30-Sep-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+
<input type="checkbox"/>	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - 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	+
<input type="checkbox"/>	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	+
<input type="checkbox"/>	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Download AE Opt Outs	Manual Task	01-Oct-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+

Actions on (0) selected: Reassign Showing record 1 to 10 of 14 items

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:

Step Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Desc By: All

<input type="checkbox"/>	Client	Process	Group	Step	Type	Scheduled	Started	Due	Completed	Assigned User	Status	
<input checked="" type="checkbox"/>	Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+
<input checked="" type="checkbox"/>	Bits And Bobs (PSDBitsandBobs)	Weekly - 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	READY	+
<input type="checkbox"/>	Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Auto Enrolment - upload feed	Manual Task	29-Sep-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+
<input type="checkbox"/>	Willows Surgery (PSDWillowsSurgery)	Weekly - 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	+
<input type="checkbox"/>	Special Presents (SPECIALPRESENTS.MCP)	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	NOT READY	+
<input type="checkbox"/>	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	NOT READY	+
<input type="checkbox"/>	Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Create Full Payment Submission	Manual Task	30-Sep-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+
<input type="checkbox"/>	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - 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	+
<input type="checkbox"/>	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	+
<input type="checkbox"/>	Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Download AE Opt Outs	Manual Task	01-Oct-2021 08:00		04-Oct-2021 17:00		Holly Daypay	NOT READY	+

Actions on (2) selected: Reassign Showing record 1 to 10 of 14 items

Reassign User for selected tasks

Search... Clear

- Pat Ternity
- Holly Daypay
- Mat Ternity
- Olive Vertime

Select None Select Cancel

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.

The screenshot shows a 'Filters' panel with the following sections:

- Teams:** A dropdown menu.
- Users:** A dropdown menu with 'Olive Vertime X' selected.
- Client:** A dropdown menu.
- Process:** A dropdown menu.
- Group:** A dropdown menu.
- Steps:** A dropdown menu.
- Type:** A dropdown menu.
- Exclude Reran Steps:**
- Exclude N/A Steps:**
- Exclude Cancelled Processes:**
- Scheduled:** Two input fields labeled 'from' and 'to'.
- Started:** Two checkboxes: 'Only show records Started: ' and 'Only show records not Started: '. Below them are two input fields labeled 'from' and 'to'.
- Due:** Two input fields labeled 'from' and 'to'. The 'from' field contains 'Mon, Oct 4, 2021 12:00 AM' and the 'to' field contains 'Mon, Oct 4, 2021 11:59 PM'. Both fields have a close 'X' button.

Via Process Progress (left-menu)

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

The PayrollPro Bureau Pat Ternity

Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: IT

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSOHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 15:41	Office 1	Running	0%	+
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct-2021 11:26	04-Oct-2021 15:20	Office 1	Running	75%	+
Home Improvements (HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep-2021 17:28	04-Oct-2021 15:14	Office 1	Failed	45%	+
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	25%	+
Cherry Cafe (PSOCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	Running	25%	+
Nuggets Nursery (NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	Running	25%	+
Helping Hands (PSOHelpingHands)	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 (PSOCherryCafe)	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%	+

Showing record 1 to 10 of 50 item(s)

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

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Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: IT

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSOHelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 15:41	Office 1	Running	0%	+
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct-2021 11:26	04-Oct-2021 15:20	Office 1	Running	75%	+
Home Improvements (HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep-2021 17:28	04-Oct-2021 15:14	Office 1	Failed	45%	+
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	25%	-
<div style="display: flex; justify-content: space-between; align-items: center;"> View Steps Process Info Pause Process </div>											
Cherry Cafe (PSOCherryCafe)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	Running	25%	+
Nuggets Nursery (NUGGETSNURSERY.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	04-Oct-2021 14:48	04-Oct-2021 14:52	Office 1	Running	25%	+
Helping Hands (PSOHelpingHands)	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 (PSOCherryCafe)	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%	+

Showing record 1 to 10 of 50 item(s)

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

Williams Farm Shop - Weekly - Paid Thursdays (Weekly - Thursday) Refresh Actions Close

Frequency: Period Number: Tax Year:

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 +
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 +
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 Manual Task notices and feeds	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 +
Create next process	Create Next Process		05-Oct-2021 08:00		08-Oct-2021 17:00		NOT READY +

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

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 -
<input type="checkbox"/> Sign Off <input type="checkbox"/> Step Info <input type="button" value="Edit 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?

Are you sure you want to edit Enter data?

Manual Assignment:

Click **Select User**:

Select User

- Pat Ternity
- Holly Daypay
- Olive Vertime

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:

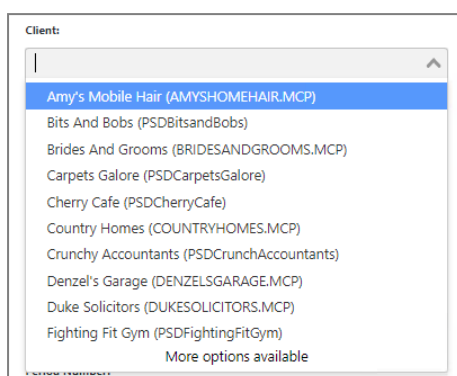
- Process Progress
- Step Progress
- Planned Processes
- Planned Steps

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

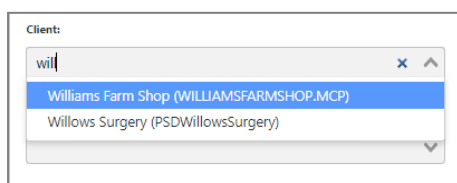
See example below using **Process Progress**:

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	IN PROGRESS	0%
Willows Surgery (PSDWillowsSurgery)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	01-Oct-2021 11:39	04-Oct-2021 15:24	Office 2	IN PROGRESS	75%
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	26	2021	01-Oct-2021 11:26	04-Oct-2021 15:20	Office 1	IN PROGRESS	75%
Home Improvements (HOMEIMPROVEMENTS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	27	2021	27-Sep-2021 17:28	04-Oct-2021 15:14	Office 1	PAUSED	0%
Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	26	2021	04-Oct-2021 14:51	04-Oct-2021 15:01	Office 2	PAUSED	0%
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	27	2021	04-Oct-2021 14:53	04-Oct-2021 14:54	Office 2	IN PROGRESS	0%
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	26	2021	01-Oct-2021 11:04	04-Oct-2021 14:53	Office 2	COMPLETED	100%
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	IN PROGRESS	0%

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:

Client:

Williams Farm Shop (WILLIAMSFARMSHOP.MCP) X

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:

Process Progress (Advanced Filters Applied)

Search [] Search Clear [] Status: All [] Sorted: Updated [] By: IF [] Refresh []

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSD-HelpingHands)	Weekly - Paid - Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	INITIATED	0%	+
Helping Hands (PSD-HelpingHands)	Weekly - Paid - Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100%	+
Helping Hands (PSD-HelpingHands)	Weekly - Paid - Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep-2021 16:22	27-Sep-2021 17:22	Office 1	COMPLETED	100%	+

Filters: [Apply] [Reset]

Team: [Unassigned X] [Office 1 X]

Client: [Helping Hands (PSD-HelpingHands) X]

Process: []

Group: []

Frequency: []

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

Process Progress (Advanced Filters Applied)

Search [] Search Clear [] Status: All [] Sorted: Updated [] By: IF [] Refresh []

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSD-HelpingHands)	Weekly - Paid - Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	INITIATED	0%	-
<p>View Steps [] Process Info [] Pause Process []</p>											
Helping Hands (PSD-HelpingHands)	Weekly - Paid - Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100%	+

Filters: [Apply] [Reset]

Team: [Unassigned X] [Office 1 X]

Client: [Helping Hands (PSD-HelpingHands) X]

Process: []

Group: []

Frequency: []

Click on **View Steps**:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday) Refresh Actions Close

Frequency: Period Number: Tax Year:

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	NULL +
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 Manual Task notices and feeds	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 +
Create next process	Create Next Process		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:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday) Refresh Actions Close

Frequency: Period Number: Tax Year:

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	NULL +
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 +

Click on **Edit Step**:

Edit Enter data? Save Cancel

Are you sure you want to edit Enter data?

Scheduled Date:

Manual Assignment: Select User Clear

Not Applicable:

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:

Process Progress (Advanced Filters Applied)

Search [] Search Clear [] Status: All - Sorted: Updated - By: IF Refresh []

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSC-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	RUNNING	21	+
Helping Hands (PSC-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100	+
Helping Hands (PSC-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep-2021 16:22	27-Sep-2021 17:22	Office 1	COMPLETED	100	+

Filters: Teams: Unassigned X Office 1 X Clients: Helping Hands (PSC-HelpingHands) X Process: Group: Frequency:

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

Process Progress (Advanced Filters Applied)

Search [] Search Clear [] Status: All - Sorted: Updated - By: IF Refresh []

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSC-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	RUNNING	21	-
Helping Hands (PSC-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100	+

View Steps Process info Pause Process

Filters: Teams: Unassigned X Office 1 X Clients: Helping Hands (PSC-HelpingHands) X Process: Group: Frequency:

Click on **View Steps**:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday)

Frequency: Weekly Period Number: 27 Tax Year: 2021 Refresh [] Actions [] Close []

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	RUN	+
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	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	+
Create next process	Create Next Process		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	-
Upload review reports to myePayWindow	Manual Task	Pat Ternity	04-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+

Click on **Edit Step**:

Edit Internal approval? Save Cancel

Are you sure you want to edit Internal approval?

Scheduled Date:

Assigned Approver: Select User Clear

Not Applicable:

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:

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSD-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	INCOMPLETE	21	+
Helping Hands (PSD-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100	+
Helping Hands (PSD-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep-2021 16:22	27-Sep-2021 17:22	Office 1	COMPLETED	100	+

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

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Helping Hands (PSD-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	INCOMPLETE	21	-
<div style="display: flex; justify-content: space-between; align-items: center;"> View Steps Process Info Pause Process </div>											
Helping Hands (PSD-HelpingHands)	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**:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday)								Refresh	Actions	Close
Frequency:	Weekly	Period 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	NULL	+		
Download AF 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 Manual Task notices and feeds	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	+		
Create next process	Create Next Process		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	-
<input type="button" value="Step info"/> <input type="button" value="Edit Step"/>								
Pay employees - submit payment files	Manual Task	Pat Ternity	05-Oct-2021 08:00		05-Oct-2021 17:00		NOT READY	+

Click on **Edit Step**:

Edit Client approval? Save Cancel

Are you sure you want to edit Client approval?

Scheduled Date:

Action When Overdue:

Assigned Approvers:

Not Applicable:

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 Progress (Advanced Filters Applied)											Refresh	Filters	Apply	Reset
Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete				
Helping Hands (PSD-Helping-hands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	ASSIGNED	0%	+	Teams: Unassigned X Office 1 X		
Helping Hands (PSD-Helping-hands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	26	2021	27-Sep-2021 17:22	04-Oct-2021 14:50	Office 1	COMPLETED	100%	+	Client: Helping Hands (PSD-Helping-hands) X		
Helping Hands (PSD-Helping-hands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	25	2021	27-Sep-2021 16:22	27-Sep-2021 17:22	Office 1	COMPLETED	100%	+	Process: Group: Frequency:		

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

Process Progress (Advanced Filters Applied)

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Helping Hands (PSC-HelpingHands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	27	2021	04-Oct-2021 14:50	04-Oct-2021 14:53	Office 1	Running	21
Helping Hands (PSC-HelpingHands)	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:**

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday)

Frequency: Weekly Period 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	NULL
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 Manual Task notices and feeds	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
Create next process	Create Next Process		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 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

Click on **Edit Step:**

Edit Enter data?

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: 🗑️

Save Cancel

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:

The screenshot shows the 'Process Progress (Advanced Filters Applied)' interface. It features a table with columns: Client, Process, Group, Frequency, Period Number, Tax Year, Started, Updated, Assigned Team, Status, and Percentage Complete. The table lists 10 rows of data for 'Helping Hands (PSDHelpingHands)'. The first row is in a 'RUNNING' state with 24% completion, while the others are 'COMPLETED' at 100%. A sidebar on the right contains filter options for Teams, Clients, Processes, Groups, Frequency, Period Number, Tax Year, Start date, and Update date. A '+ Refresh' button is located at the top right of the table area.

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

This screenshot shows the same interface as above, but with the first row expanded. Below the row, there are three buttons: 'View Steps', 'Process Info', and 'Pause Process'. The 'View Steps' button is highlighted in blue. The table below shows the second row of data, which is 'COMPLETED' at 100%.

Click on **View Steps**:

Helping Hands - Weekly - Paid Thursdays (Weekly - Thursday)								Refresh	Actions	Close
Frequency:	Weekly	Period 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	IN PROGRESS	+		
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	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	+		
Create next process	Create Next Process		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 Outbox	Manual Task	Pat Ternity	05-Oct-2021 08:00	07-Oct-2021 17:00		NOT READY	-		
								Step Info Edit Step		
	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 payslips and P45s to myePayWindow? Save Cancel

Are you sure you want to edit Upload payslips and P45s to myePayWindow?

Scheduled Date:

Payslips:

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 Pat Ternity

Process Progress (Advanced Filters Applied) Refresh

Search

Status: All | Sorted: Updated | By: IT

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	PAID	52	+
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	+
Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 08:00	Directors	RUNNING	75	+
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	+
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	+
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	12	-
View Steps Process Info Pause Process											
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**:

Amy's Mobile Hair - Weekly - Directors (Weekly - Directors) Refresh | Actions | Close

Frequency: Period Number: Tax Year:

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 +
Submit Full Payment Submission	Send FPS		24-Aug-2022 08:00		26-Aug-2022 17:00		NOT READY +
Create Report and Add To Outbox	Create Report		24-Aug-2022 08:00		26-Aug-2022 17:00		NOT READY +
Close period	Close Run		30-Aug-2022 08:00		02-Sep-2022 17:00		NOT READY +
Open period	Open Run		30-Aug-2022 08:00		02-Sep-2022 17:00		NOT READY +
Create next process	Create Next Process		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 Outbox	Create Report		24-Aug-2022 08:00		26-Aug-2022 17:00		NOT READY -
<input type="button" value="Step Info"/> <input type="button" value="Edit Step"/>							
Close period	Close Run		30-Aug-2022 08:00		02-Sep-2022 17:00		NOT READY +

Click on **Edit Step**:

Edit Create Report and Add To Outbox? Save | Cancel

Are you sure you want to edit Create Report and Add To Outbox?

Scheduled Date:

Report Name	Export Type	File Name Override	Add To Outbox	
PAPEN1/PSPEN1	PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
PARUN6/PSRUN6	PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
PARUNT3/PSRUNT3	PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
PARUNT5/PSRUNT5	PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Not Applicable:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>

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**:

Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status

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

Client	Process	Group	First Step Start Date	Last Step Due Date	Frequency	Period Number	Tax Year	Assigned Team	Schedule Status

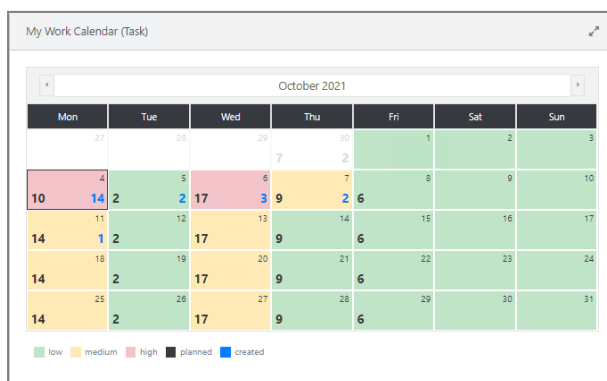
You will see the description has changed to Currently Updating, when it has completed it will show the date and time.

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**:

Weekly Work Breakdown (Task)

Week Starting: Sun, 3rd Oct 2021

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
Rat 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
Clive Verlime	0	1	0	0	3	0	0	4
Total	0	18	26	10	19	4	0	77

Select Planned Steps:

Weekly Work Breakdown (Task)

Week Starting: Sun, 3rd Oct 2021

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
Rat 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
Clive Verlime	0	1	0	2	1	0	0	4
Total	0	11	24	23	24	26	0	108

Overview – Work Calendar

Work Calendar (Task)

October 2021

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	18 24	26 23	10 24	19 26	4	16 10
11	12 4 26	13 3 26	14 4 26	15 4 26	16	17
18	19 1 29	20 13 36	21 3 39	22 6 35	23 2	24
25	26 9 31	27 32	28 2 32	29 2 35	30	31

low medium high planned created

Client Approvals – Approval Calendar

Approval Calendar (Task)

October 2021

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

low medium high planned created

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

In the left menu select Process Progress:

The PayrollPro Bureau Holly Daypay ▾

Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: IT

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	27-Sep-2021 17:21	01-Oct-2021 11:27	Office 2	RUNNING	<div style="width: 75%;"></div> 75	+
Spick 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	<div style="width: 100%;"></div> 100	+
Brides 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	<div style="width: 0%;"></div>	+
Brides 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	<div style="width: 100%;"></div> 100	+
Mike'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	<div style="width: 0%;"></div>	+
Crunchy Accountants (PSDCrunchyAccountants)	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	<div style="width: 0%;"></div>	+
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	<div style="width: 100%;"></div> 100	+
Crunchy Accountants (PSDCrunchyAccountants)	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	<div style="width: 100%;"></div> 100	+
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	25	2021	27-Sep-2021 16:28	01-Oct-2021 11:04	Office 2	COMPLETED	<div style="width: 100%;"></div> 100	+
Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	28	2021	01-Oct-2021 08:30	01-Oct-2021 08:31	Directors	RUNNING	<div style="width: 0%;"></div>	+

Showing record 21 to 30 of 66 item(s)

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

The PayrollPro Bureau Holly Daypay ▾

Process Progress (Advanced Filters Applied) Refresh

Search Search Clear Status: All Sorted: Updated By: IT

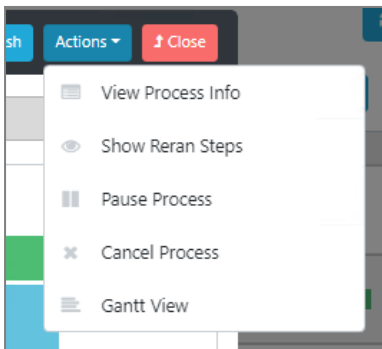
Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete	
Bits And Bobs (PSDBitsandBobs)	Weekly - Fridays	Weekly - Friday	Weekly	26	2021	27-Sep-2021 17:21	01-Oct-2021 11:27	Office 2	RUNNING	<div style="width: 75%;"></div> 75	+
Spick And Span Cleaners (SPICKANDSPANCLEANERS.MCP)	Weekly - Changes	Weekly - Changes	Weekly	25	2021	27-Sep-2021 17:23	01-Oct-2021 11:26	Office 1	COMPLETED	<div style="width: 100%;"></div> 100	+
Brides 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	<div style="width: 0%;"></div>	+
Brides 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	<div style="width: 100%;"></div> 100	+
Mike'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	<div style="width: 0%;"></div>	-
<div style="display: flex; justify-content: space-between; align-items: center;"> View Steps Process Info Pause Process </div>											
Crunchy Accountants (PSDCrunchyAccountants)	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	<div style="width: 0%;"></div>	+
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	<div style="width: 100%;"></div> 100	+
Crunchy Accountants (PSDCrunchyAccountants)	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	<div style="width: 100%;"></div> 100	+
Treasure Nursing Home (TREASURENURSINGHOME.MCP)	Weekly - No Changes	Weekly - No Changes	Weekly	25	2021	27-Sep-2021 16:28	01-Oct-2021 11:04	Office 2	COMPLETED	<div style="width: 100%;"></div> 100	+
Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	28	2021	01-Oct-2021 08:30	01-Oct-2021 08:31	Directors	RUNNING	<div style="width: 0%;"></div>	+

Showing record 21 to 30 of 66 item(s)

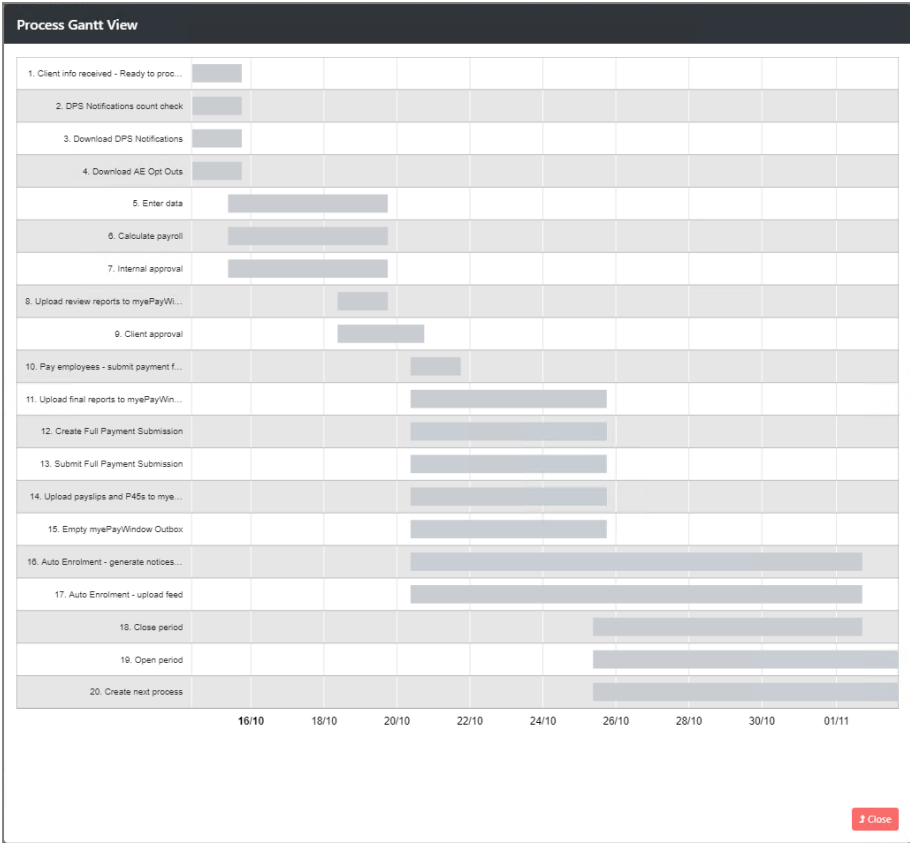
Click on the action **View Steps**:

Mike's Motorbike Shop - Monthly - Changes - End of Month (Monthly - Changes - End of Month)								Refresh	Actions	Close
Frequency:	Monthly	Period 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 - generate notices and feeds	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			
Create next process	Create Next Process		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:



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:

Step Progress (Advanced Filters Applied)

Search [Search] [Clear] Status: Filter [v] Sorted: Due [v] By: [v] [Filter]

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	REMAN
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	REMAN
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	REMAN
Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Internal approval	Internal Approval	29-Sep-2021 08:00	04-Oct-2021 15:01	30-Sep-2021 17:00	04-Oct-2021 15:01	Olive Vertime	PAID

Actions on (0) selected: Showing record 1 to 4 of 4 item(s)

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Filters: Apply [v] [Reset]

Team: [v]

User: [v]

Client: [v]

Process: [v]

Group: [v]

Step: [v]

Type: Internal Approval [v]

Exclude Reman Steps:

Exclude N/A Steps:

Exclude Cancelled Processes:

Schedule: from [] to []

Start: Only show records started:
Only show records not started:
from [] to []

Due: from [] to []

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

Step Progress (Advanced Filters Applied)

Search [Search] [Clear] Status: Filter [v] Sorted: Due [v] By: [v] [Filter]

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	REMAN	+
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	REMAN	+
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	REMAN	+
Special Presents (SPECIALPRESENTS.MCP)	Weekly - No Changes	Weekly - No Changes	Internal approval	Internal Approval	29-Sep-2021 08:00	04-Oct-2021 15:01	30-Sep-2021 17:00	04-Oct-2021 15:01	Olive Vertime	PAID	-

Actions on (0) selected: Showing record 1 to 4 of 4 item(s)

View Process [v] Step Info [v]

Click on **View Process**:

Special Presents - Weekly - No Changes (Weekly - No Changes)								Refresh	Actions	Close
Frequency:	Weekly	Period 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	Manual Task	Holly Daypay	29-Sep-2021 08:00	04-Oct-2021 14:53	30-Sep-2021 17:00	04-Oct-2021 14:53	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	IN PROGRESS	+		
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	TABLED	+		
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 paylips 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	Manual 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	+		
Create next process	Create Next Process		30-Sep-2021 08:00		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	TABLED	-		
Upload review reports to myePayWindow	Manual Task	Holly Daypay	29-Sep-2021 08:00		30-Sep-2021 17:00		OVERDUE	+		

Click on **Edit Step**:

Edit Internal approval? Save Cancel

Are you sure you want to edit internal approval?

Action Required By: Holly Daypay Select User

Click on **Select User**:

Select User

Clear

Pat Ternity

Mat Ternity

Olive Vertime

Select Cancel

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

Click **Save**.

How to deal with rejected approvals

Under the **vPA Dashboard** select **Client Approvals**:

The screenshot shows the vPA Dashboard interface. The top navigation bar includes 'vPA Dashboard', 'My Work', 'Automated', 'Overview', and 'Client Approvals'. The left sidebar contains various navigation options like 'Groups', 'Teams', 'Clients', and 'Process Progress'. The main content area is split into two sections: 'Approval Calendar (Task)' and 'Action Required (Rejected Client Approvals: 1)'. The calendar shows a grid for October 2021 with task counts for each day. The 'Action Required' section highlights a rejected approval with a red background and provides specific details about the rejection.

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

The screenshot displays the 'View Steps' screen for a weekly process. At the top, there are controls for 'Frequency' (Weekly), 'Period Number' (27), and 'Tax Year' (2021). Below this is a table of process steps. The 'Client approval' step is highlighted in red, indicating it is 'FAILED'. Other steps are marked as 'COMPLETED' or 'NOT READY'. Each row includes a plus icon for further details.

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 - generate notices and feeds	Manual 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
Create next process	Create Next Process		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**:

The screenshot shows the IRIS PayrollPro Bureau interface. On the left is a navigation menu with options like 'vPA Dashboard', 'Groups', 'Teams', 'Clients', 'Month View', 'Process Progress', 'Step Progress', 'Planned Processes', 'Planned Steps', 'Logs', 'Virtual Payroll Admin', and 'Admin Settings'. The main area is divided into 'My Work', 'Automated', 'Overview', and 'Client Approvals'. The 'Client Approvals' tab is active, showing an 'Approval Calendar (Test)' for August 2022. Below the calendar is a 'Today's Breakdown' section with a red bar indicating 'Due Prior to Today (3 of 3)'. Three items are listed: 'Spick And Span Cleaners', 'Nugget Nursery', and 'Cherry Cafe'. Each item has a 'View Process' icon (a document with a checkmark) highlighted with a red box. To the right is an 'Action Required' section stating 'There are currently no rejected approvals' and a 'Today's Approvals (Test)' donut chart showing 3 approvals.

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

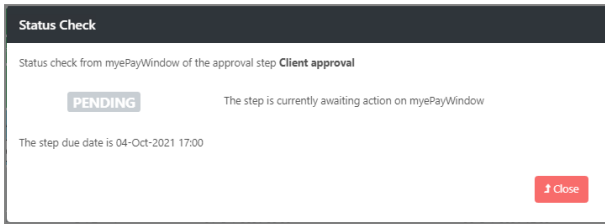
The screenshot shows a table titled 'Home Improvements - Weekly - Changes (Weekly - Changes)'. The table has columns for Step Name, Job Type, User, Scheduled, Started, Due, Completed, and Status. The 'Client approval' row is highlighted in blue and has a '+' icon in the Status column. Below the table are buttons for 'Step Info', 'Check Status', and 'Bureau Override'.

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	FAIL +
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 to myePayWindow		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 - generate notices and feeds	Manual 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 +
Create next process	Create Next Process		04-Oct-2021 08:00		07-Oct-2021 17:00		NOT READY +

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

This is a close-up of the 'Client approval' row from the previous screenshot. The row is highlighted in blue. The 'Status' column shows 'READY' with a '-' icon. Below the row, there are three buttons: 'Step Info', 'Check Status' (which is highlighted with a red box), and 'Bureau Override'.

Now select **Check Status**.



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.

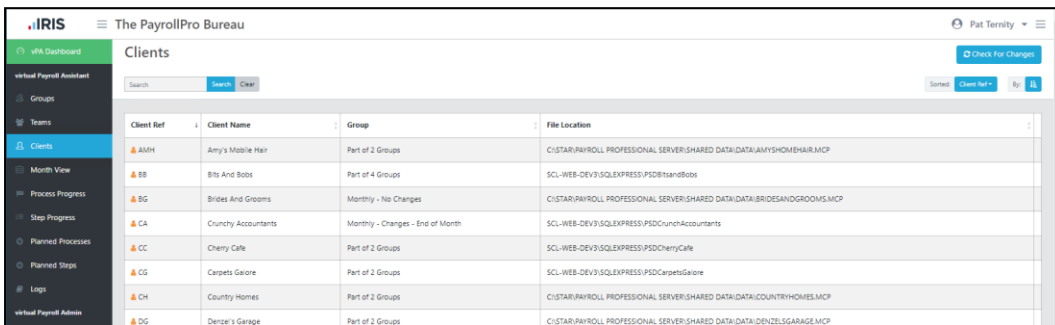
Does the Payroll Professional audit trail show what automated steps have done

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

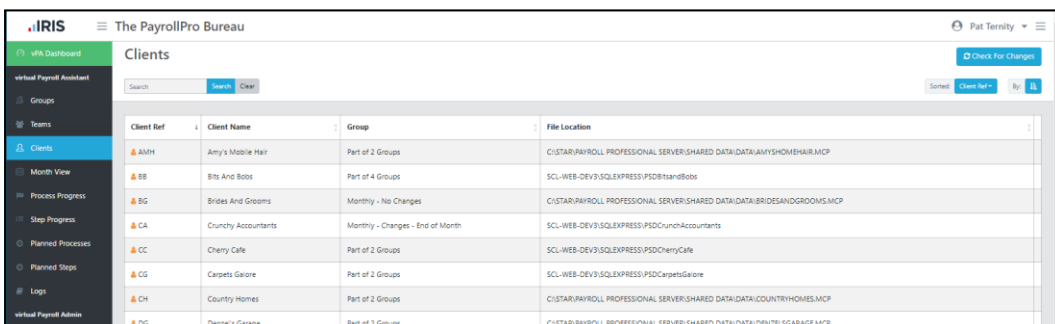
If you have converted payroll data files from Access to SQL, which are attached to Groups set up in vPA you will need to select the **Check For Changes** button under the **Clients** tab.



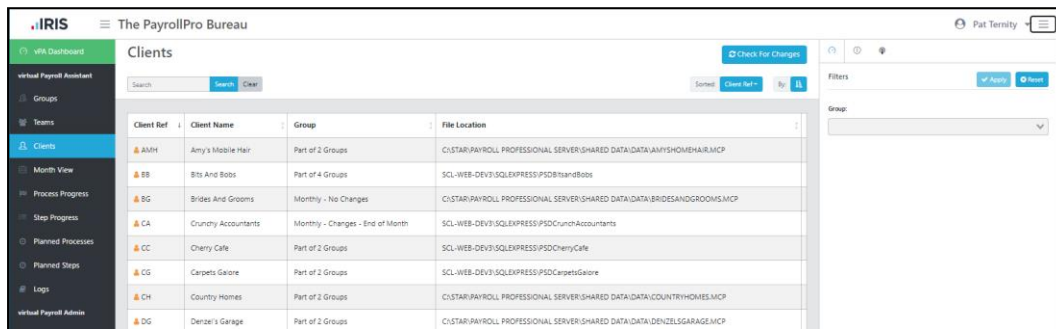
This will then check for any changes and update the Client details for the affected payrolls in all locations where the clients payroll data file information is displayed within vPA.

How to see what Group a Client is attached

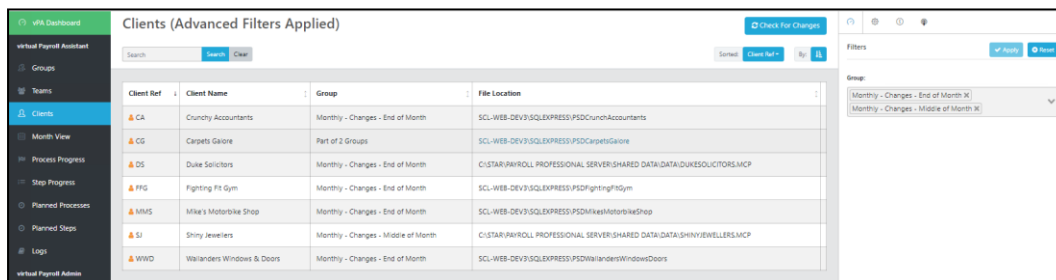
Under the **Clients** tab the grid includes a column for **Group** so that you can see the group a client is attached to. Select **Clients** from the left menu:



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.

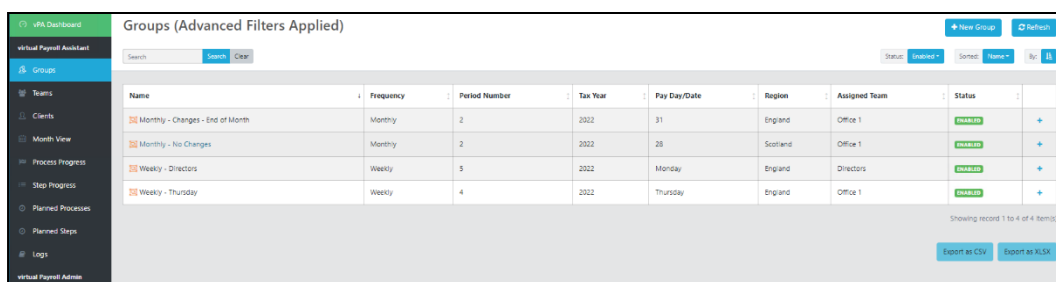


You can filter the clients by a Group or multiple Groups, click on the burger icon in the top right-hand corner of the screen and select the Filter icon, use the drop down to select a Group(s) then click on **Apply**:



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**:



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.

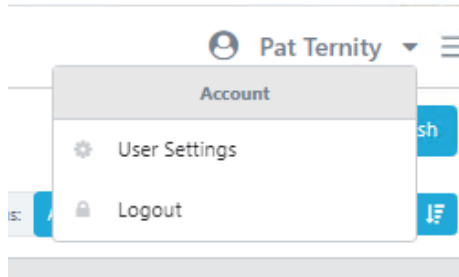
After an export button is selected it is then disabled until the page is refreshed or the grid is reloaded by changing the filter.

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

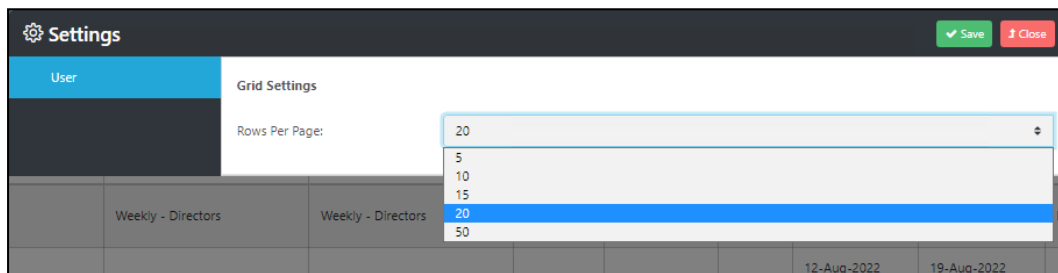
In the vPA website click on the username in the top right-hand corner:



Click on **User Settings**, the following screen appear:



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



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:

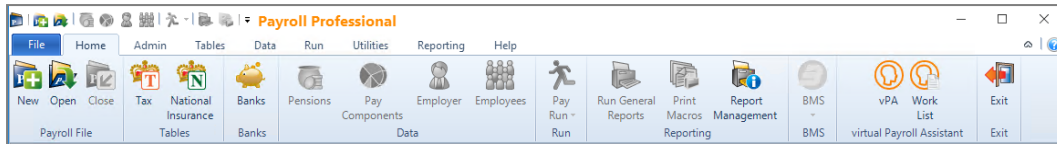
- Via Payroll Professional
- Via vPA website

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'.

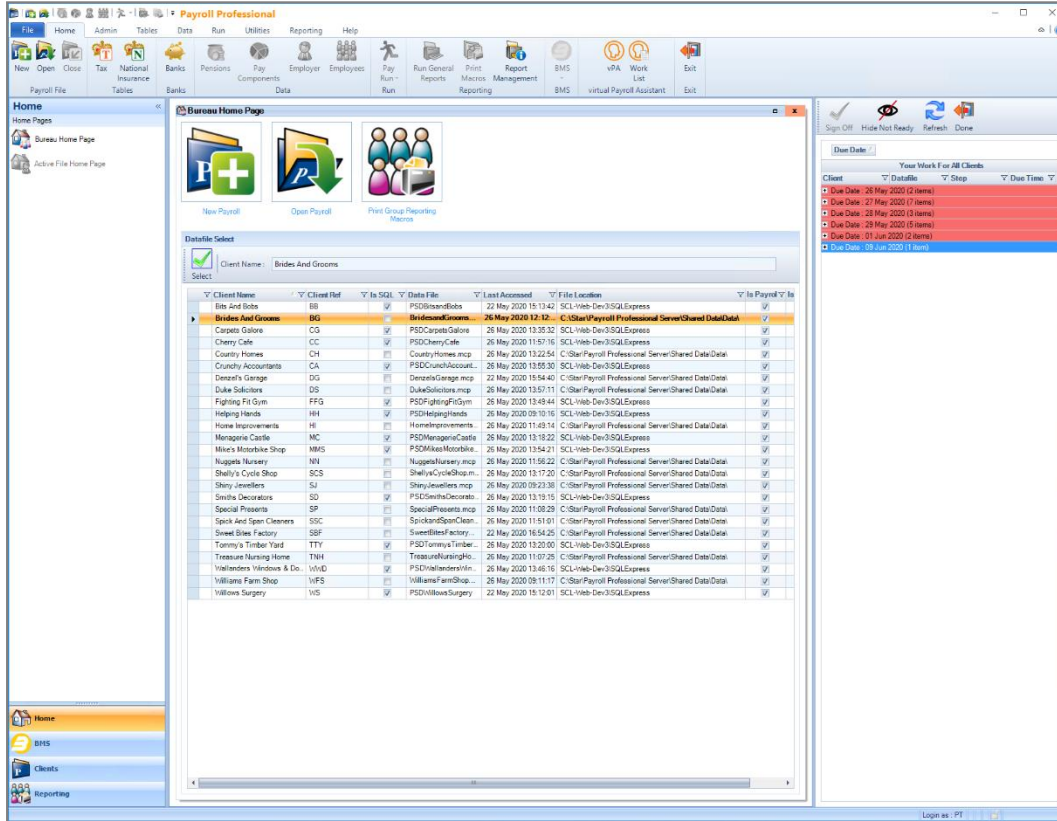
Sign-off via the vPA website, is a secondary option and may be useful for payroll managers or team leaders as a backup option.

Via Payroll Professional

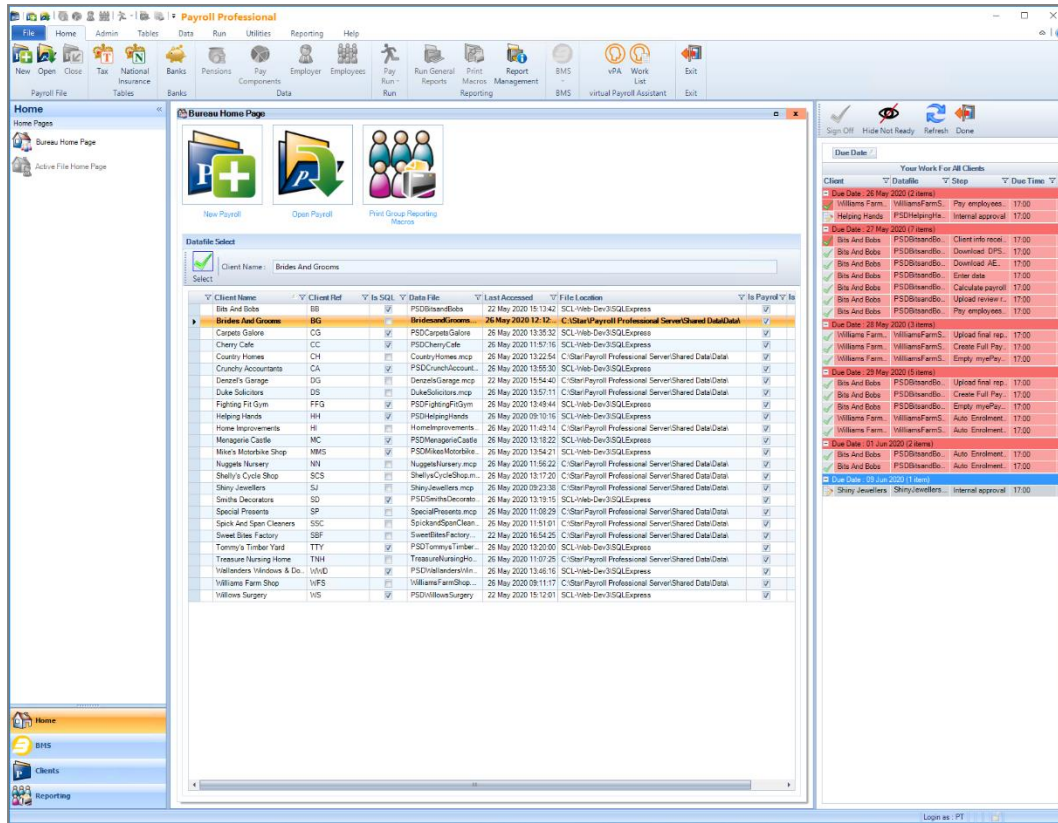
In Payroll Professional, **Home** tab\Virtual Payroll Assistant section:



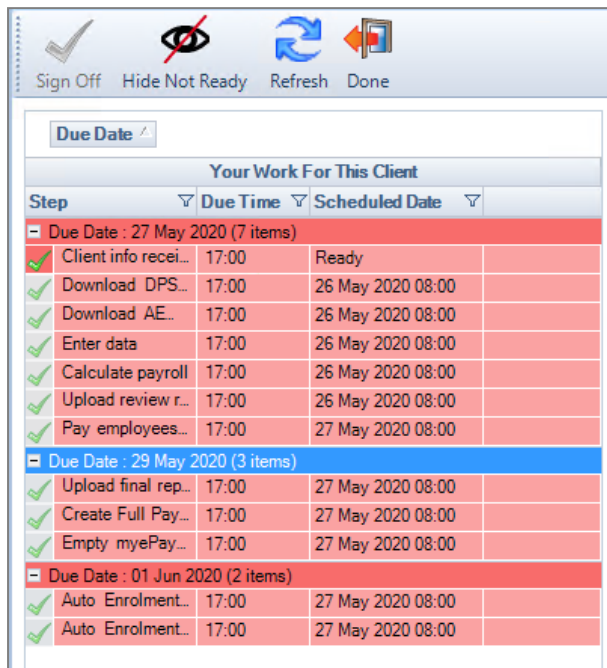
Click **Work List**:



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.



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:



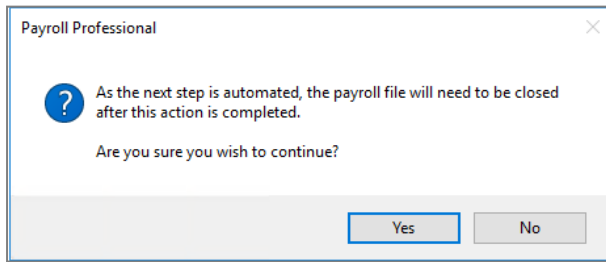
Manual tasks show with the icon and the internal approvals are shown with the icon .

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.

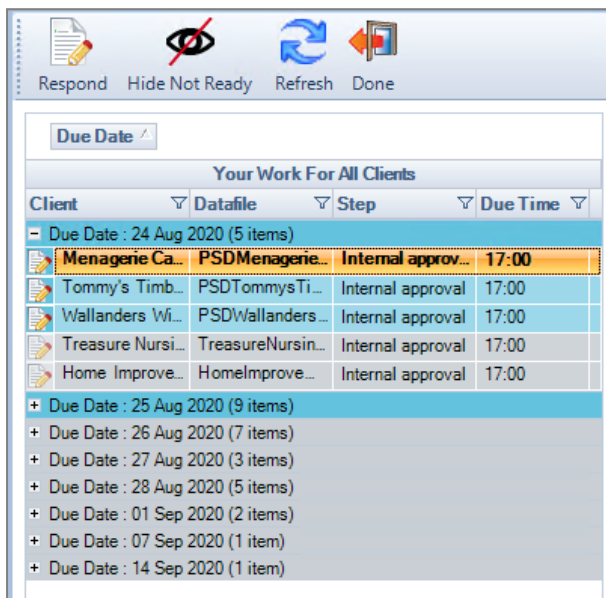
If you have the payroll file open and the next step is automated, then you will see the following message:



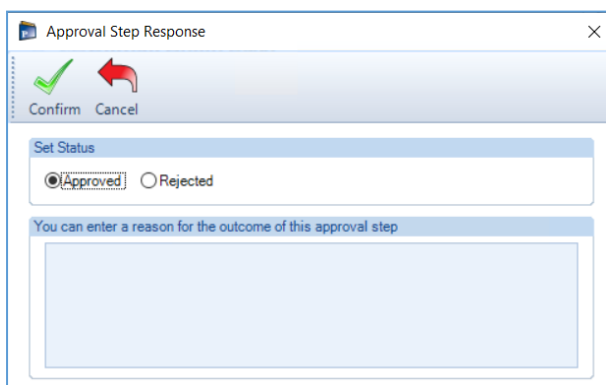
If you want to proceed, select **Yes** and the data file will automatically close for the next step to start. If you need to make further changes to the payroll before the automated step runs, then select **No** the step you were marking as complete will remain uncompleted until you are ready to sign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

Responding to internal approvals

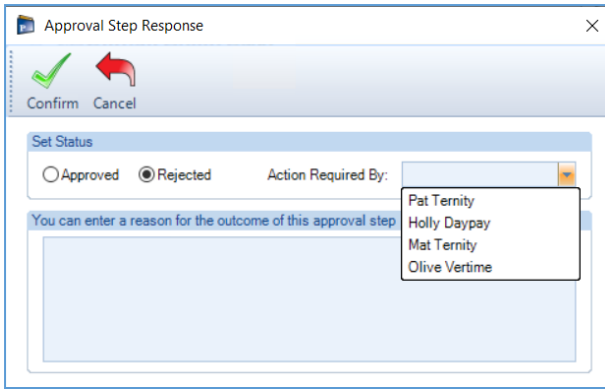
For an internal approval step when you have checked the payroll then highlight the corresponding step in the list and then click on **Respond** button in the form header:



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:



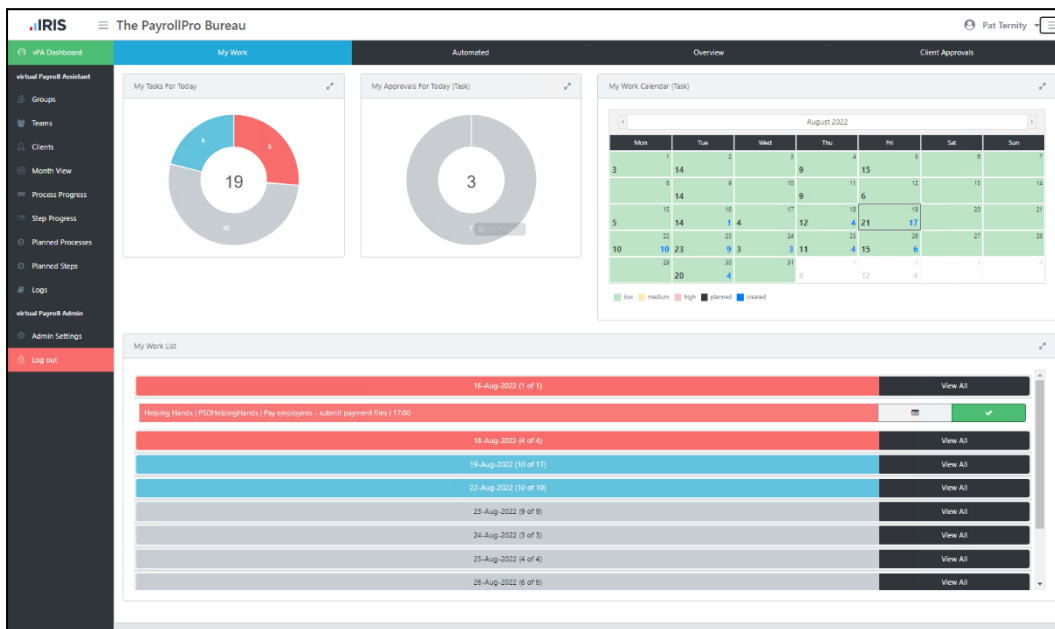
When you select **Rejected**, you must also select a user next to **Action Required By**:



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

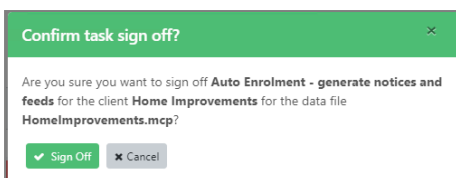
To sign off manual tasks and respond to internal approvals via the [vPA Dashboard](#) page **My Work**:



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: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

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 Step Response

Set status: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

Action Required By:

Once you have entered the reason and selected the user, click on **Confirm**:

Internal Approval Step Response

Set status: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

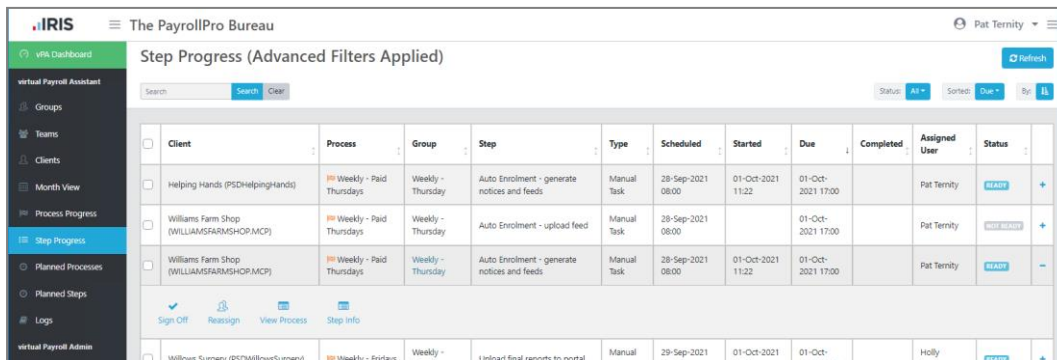
Response explanation...

Action Required By:


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:



Client	Process	Group	Step	Type	Scheduled	Started	Due	Completed	Assigned User	Status
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	READY
Williams Farm Shop (WILLIAMSFARMSHOP.MCP)	Weekly - Paid Thursdays	Weekly - Thursday	Auto Enrolment - upload feed	Manual Task	28-Sep-2021 08:00		01-Oct-2021 17:00		Pat Ternity	READY
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	READY
Willows Surveys (PSDWillowsSurveys)	Weekly - Fridays	Weekly - Friday	Upload final reports to portal	Manual	29-Sep-2021	01-Oct-2021	01-Oct-		Holly	READY

Find the step in the listing (use filters as required) and expand the row by clicking '+' symbol, click on  action to display following screen:

Williams Farm Shop - Weekly - Paid Thursdays (Weekly - Thursday)							Refresh	Actions	Close
Frequency:	Weekly	Period 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	+	
Client info received - Ready to process	Manual Task	Pat Ternity	27-Sep-2021 08:00	27-Sep-2021 17:28	28-Sep-2021 17:00	01-Oct-2021 11:02	COMPLETED	+	
DPS Notifications count check	DPS Check		27-Sep-2021 08:00	01-Oct-2021 11:02	28-Sep-2021 17:00	01-Oct-2021 11:03	COMPLETED	+	
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	+	
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	+	
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	+	
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	+	
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	+	
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	+	
Pay employees - submit payment files	Manual Task	Pat Ternity	28-Sep-2021 08:00	01-Oct-2021 11:14	28-Sep-2021 17:00	01-Oct-2021 11:18	COMPLETED	+	
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	+	
Create Full Payment Submission	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	+	
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	+	
Upload payslips and P45s to myePayWindow	Empty Outbox to myePayWindow		28-Sep-2021 08:00	01-Oct-2021 11:22	30-Sep-2021 17:00	01-Oct-2021 11:22	COMPLETED	+	
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 - generate notices and feeds	Manual 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	+	
Close period	Close Run		28-Sep-2021 08:00		01-Oct-2021 17:00		NOT READY	+	
Open period	Open Run		28-Sep-2021 08:00		01-Oct-2021 17:00		NOT READY	+	
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 - generate notices and feeds	Manual Task	Pat Ternity	28-Sep-2021 08:00	01-Oct-2021 11:22	01-Oct-2021 17:00		READY	-
<input type="checkbox"/> Sign Off <input type="checkbox"/> Step Info <input type="checkbox"/> Edit Step								
Auto Enrolment - upload feed	Manual Task	Pat Ternity	28-Sep-2021 08:00		01-Oct-2021 17:00		NOT 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:

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	-
<input type="checkbox"/> Step Info <input type="checkbox"/> Respond <input type="checkbox"/> Edit Step								

Click on Respond 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: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

Confirm Back

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:

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**.

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:

Client	Process	Group	Frequency	Period Number	Tax Year	Started	Updated	Assigned Team	Status	Percentage Complete
Harry The Gardener (HARRYTHEGARDENER.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	19-Aug-2022 08:31	19-Aug-2022 10:07	Directors	REJECT	13
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
Robin Electrician (ROBINELECTRICIAN.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	15-Aug-2022 08:31	19-Aug-2022 08:00	Directors	REJECTED	0
Hearing Hands (PSDhearinghands)	Weekly - Paid Thursdays	Weekly - Thursday	Weekly	20	2022	17-Aug-2022 15:53	18-Aug-2022 16:16	Office 1	REJECTED	48
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	REJECTED	51
Amir's Mobile Hair (AMIRSMOBILEHAIR.MCP)	Weekly - Directors	Weekly - Directors	Weekly	21	2022	18-Aug-2022	18-Aug-2022	Directors	REJECTED	0

Click **View Steps** action to display the individual Clients/process/steps:

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
Open period	Open Run		22-Aug-2022 08:00		25-Aug-2022 17:00		NOT READY
Create next process	Create Next Process		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		OVERDUE	-
<input type="checkbox"/> Sign Off <input type="checkbox"/> Step Info <input type="checkbox"/> Edit Step								
Close period	Close Run		22-May-2020 08:00		28-May-2020 17:00		OVERDUE	+
Open period	Open Run		22-May-2020 08:00		28-May-2020 17:00		OVERDUE	+

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	-
<input type="checkbox"/> Step Info <input checked="" type="checkbox"/> Respond <input type="checkbox"/> Edit Step								
Upload review reports to vpaPayWindow	Manual Task	Pat Ternity	26-May-2020 08:00		27-May-2020 17:00		OVERDUE	+

Click on Respond 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: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

Confirm Back

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 Step Response

Set status: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

Action Required By:

Confirm Back

Once you have entered the reason and selected the user, click on **Confirm**:

Internal Approval Step Response

Set status: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

Action Required By:

Confirm 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**.

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**:

Task ID	Task Name	Client Approval	Due Date	Status
1366	Helping Hands	Client approval	26-May-2020 17:00	Overdue
1292	Wilkes Surgery	Client approval	27-May-2020 17:00	Overdue
1294	Box And Boots	Client approval	27-May-2020 17:00	Overdue
1370	Spick And Span Cleaners	Client approval	28-May-2020 17:00	Overdue

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: Approved Rejected

You must enter a reason for the outcome of this approval step (maximum number of characters - 250).

Response explanation...

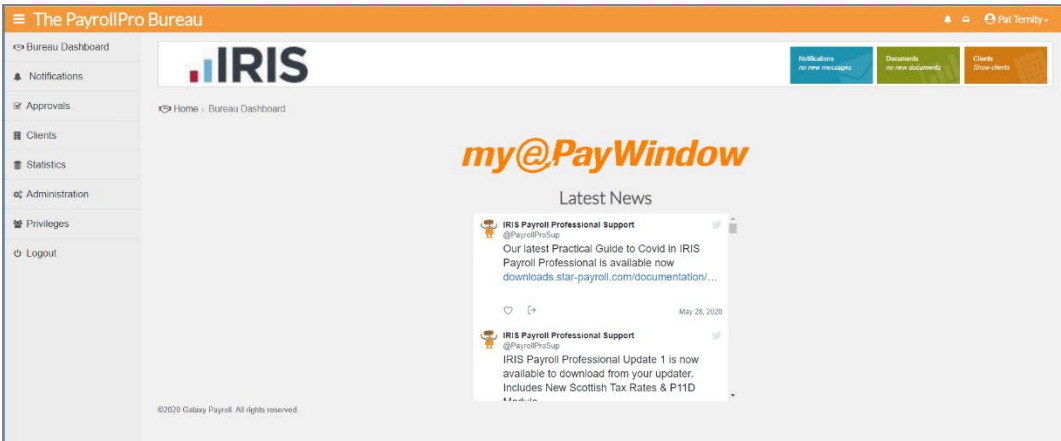
Please be aware that any comments entered here will be visible to employer users on myePayWindow.

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**.

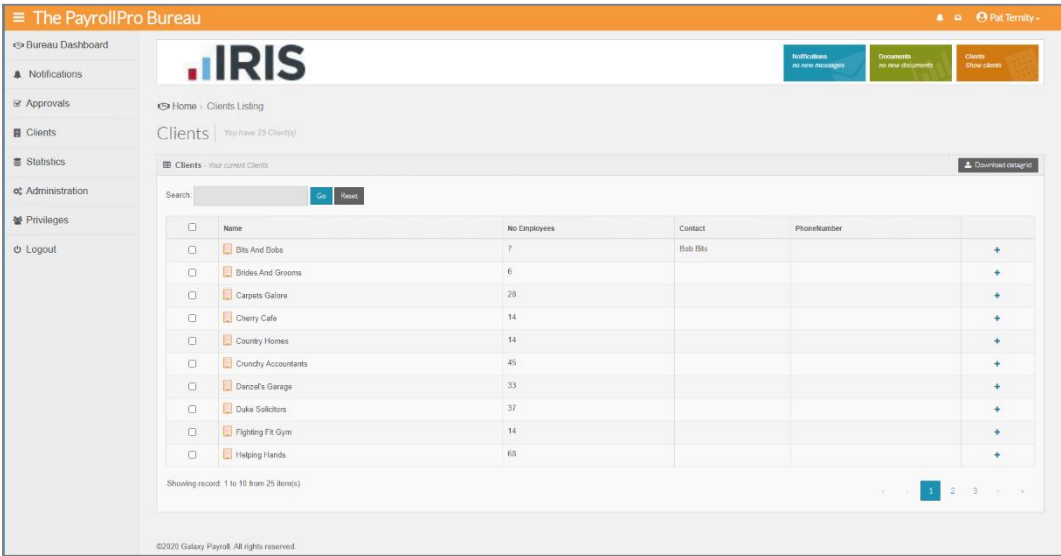
If you reject the client approval then the payroll will need to be re-run, see the section **How to rerun process step(s) for a client**.

Via myePayWindow

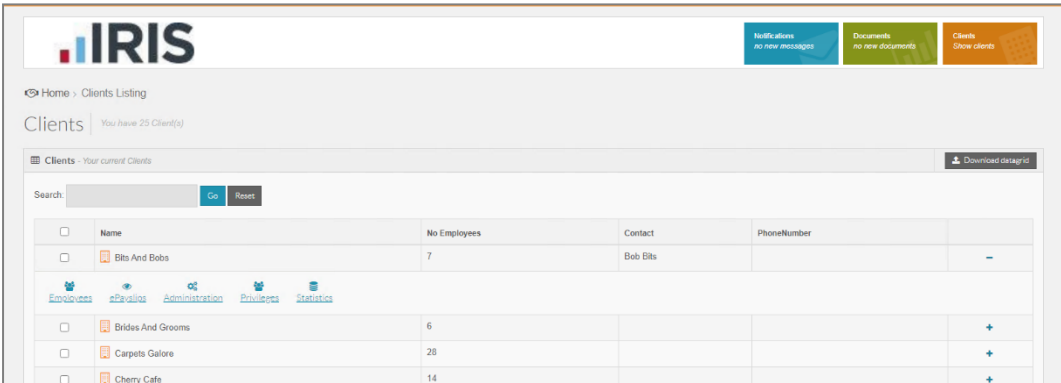
You can approve or reject the clients approval, login to myePayWindow:



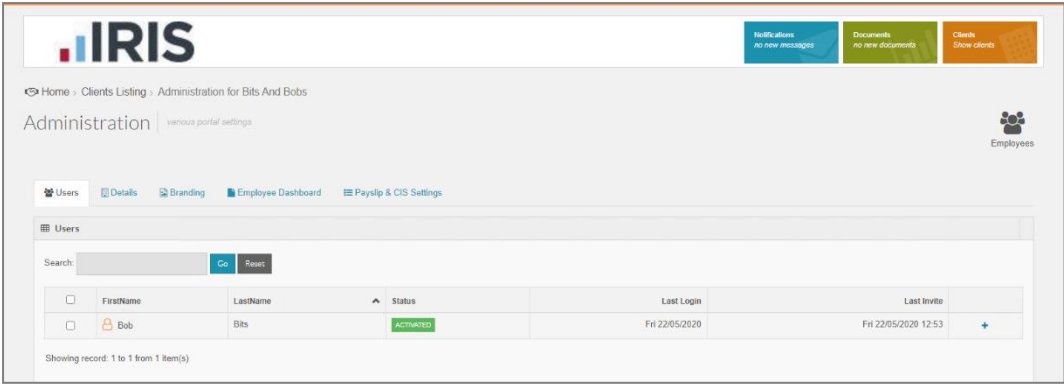
In the left-menu select **Clients**:



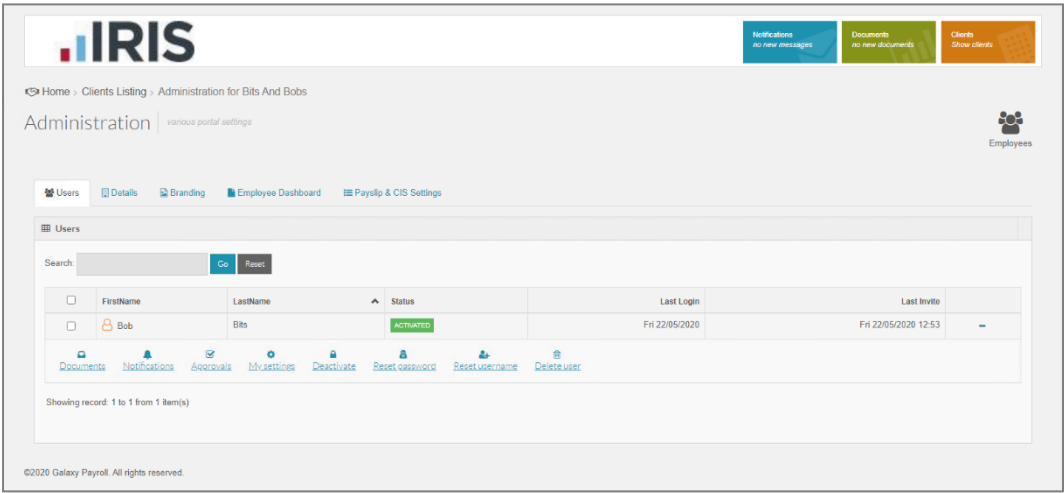
Click on '+' symbol to expand the row for the client:



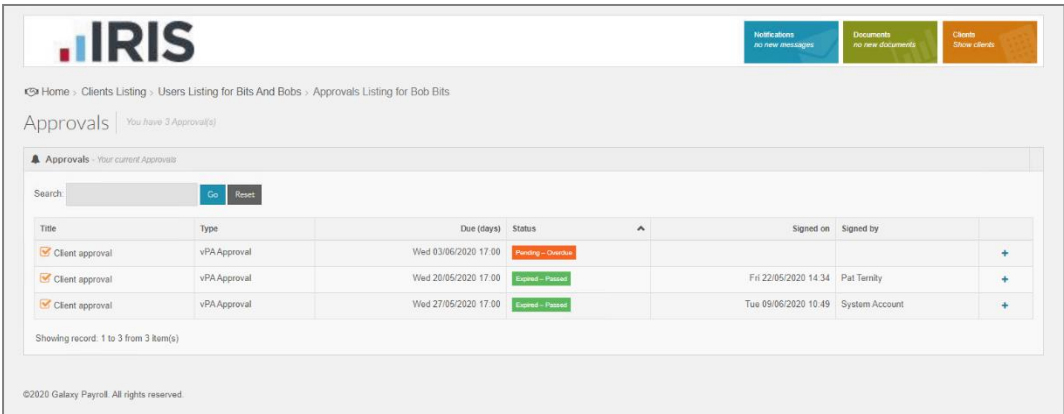
Under actions select **Administration**:



Click on '+' symbol to expand the row for the user:



Under actions click on Approvals:



Click on '+' symbol to expand the row for the Client approval that you need to sign off on the clients behalf:

IRIS

Home > Clients Listing > Users Listing for Bits And Bobs > Approvals Listing for Bob Bits

Approvals | You have 3 Approval(s)

Approvals - Your current Approvals

Search: [] [Go] [Reset]

Title	Type	Due (days)	Status	Signed on	Signed by
Client approval	vPA Approval	Wed 03/06/2020 17:00	Pending - Client		
Client approval	vPA Approval	Wed 20/05/2020 17:00	Failed - Passed	Fri 22/05/2020 14:34	Pat Ternity
Client approval	vPA Approval	Wed 27/05/2020 17:00	Approved - Passed	Tue 09/06/2020 10:49	System Account

Showing record: 1 to 3 from 3 item(s)

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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
✖ No

Enter a comment, note this will be visible to the employer user, then click on **Approve**:

Approve task? ✕

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]

✔ Approve
✖ No

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).

IRIS

Home > Clients Listing > Users Listing for Bits And Bobs > Approvals Listing for Bob Bits

Approvals | You have 3 Approval(s)

Approvals - Your current Approvals

Search: [] [Go] [Reset]

Title	Type	Due (days)	Status	Signed on	Signed by
Client approval	vPA Approval	Wed 20/05/2020 17:00	Approved - Passed	Fri 22/05/2020 14:34	Pat Ternity
Client approval	vPA Approval	Wed 27/05/2020 17:00	Approved - Passed	Tue 09/06/2020 10:49	System Account
Client approval	vPA Approval	Wed 03/06/2020 17:00	Approved by Bureau	Tue 09/06/2020 13:36	Pat Ternity

Showing record: 1 to 3 from 3 item(s)

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You can click on [Show comment](#) to see the details entered for each Client approval:

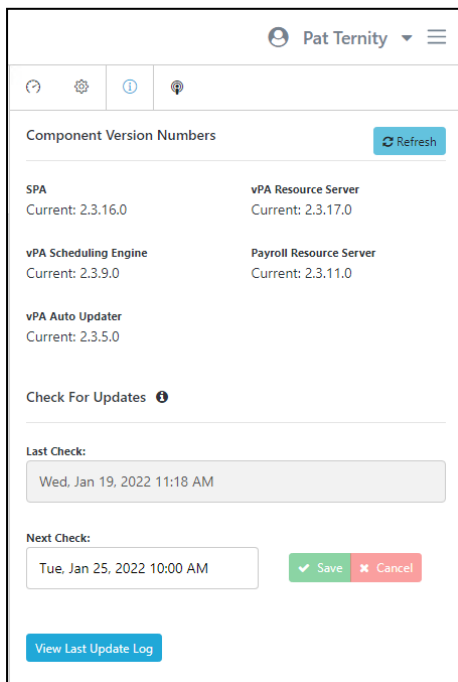
Comment added by Pat Ternity ✕

Mr Bobs called and is happy with the payroll, we can proceed to finalise the payroll.

✕ 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:



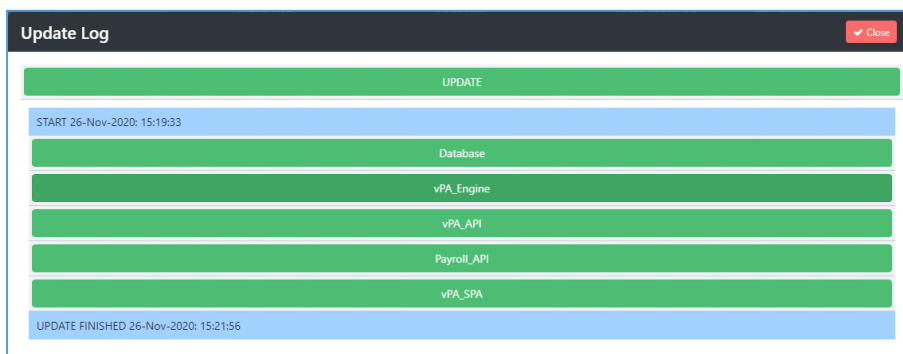
vPA is scheduled to automatically check for updates available on our FTP site <ftp://downloads.star-payroll.com/vPA> every Tuesday at 10am

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 successful or where the update failed:

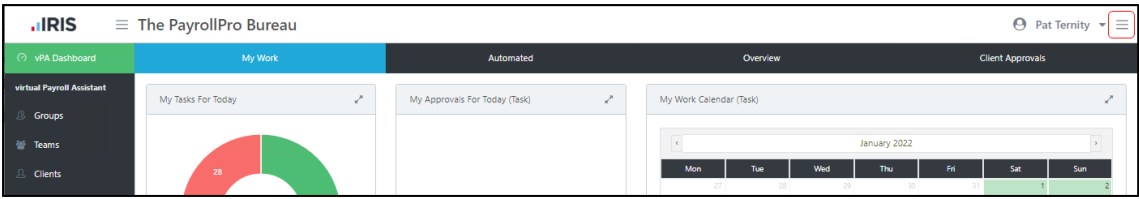


Click on a row to expand the details.

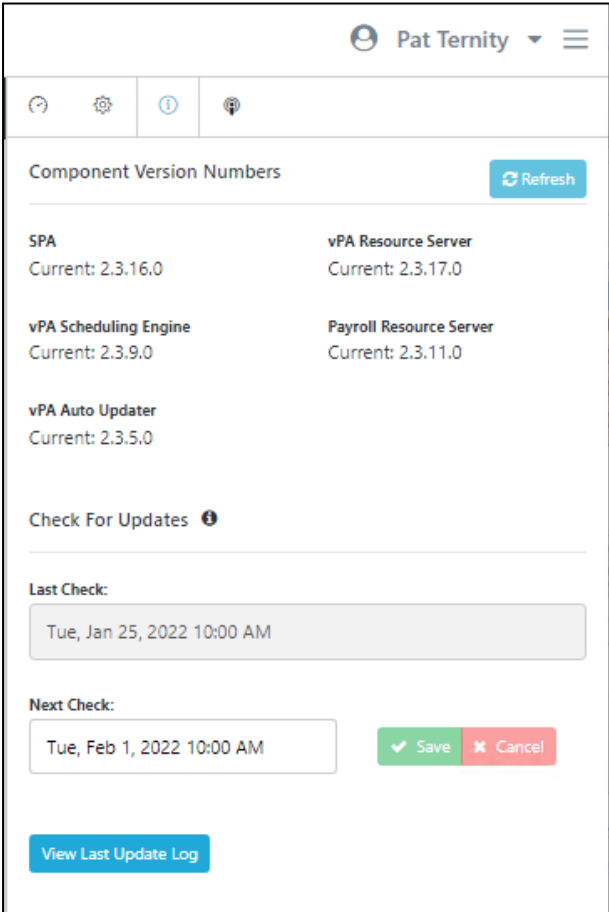
Schedule checking for an update

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:



Click on the date and time shown within the **Next Check** box:

Next Check:

Tue, Feb 1, 2022 10:00 AM ✓ Save ✗ Cancel

2022
Tue 1 Feb 10:00

← February 2022 →

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

05
06
07
08
09
10 00
11 01
12 02
13 03
14 04
15 05

Now ✓

Click on **Now** or select a specific date and time, once selected click **Save**:

Next Check:

Thu, Jan 27, 2022 1:31 PM ✓ Save ✗ Cancel

View Last Update Log

vPA will check for any available updates at the date and time specified.

Update available and scheduling installation

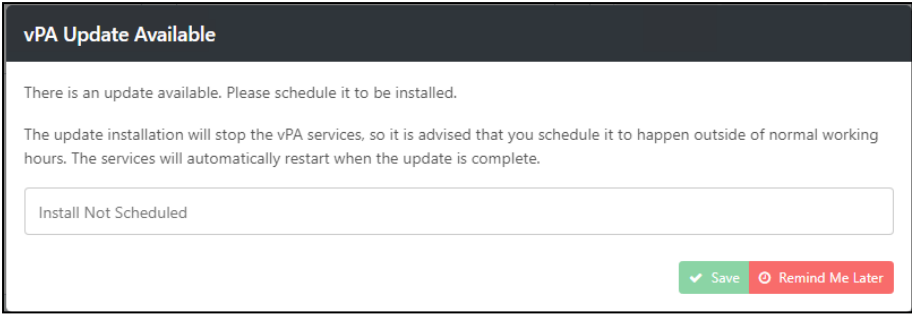
When users with the roles Supervisor or Operator, login to vPA website and an update is available they will be shown the following message informing them an update is available.

vPA Update Available

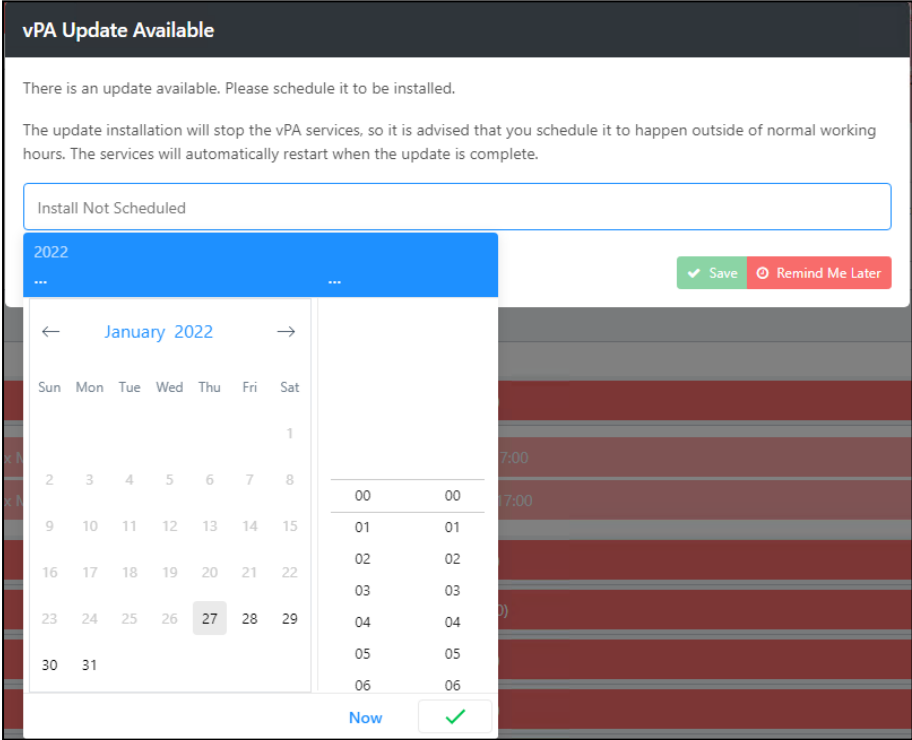
There is an update available. Please inform an admin that they need to schedule it to be installed.

✓ Ok

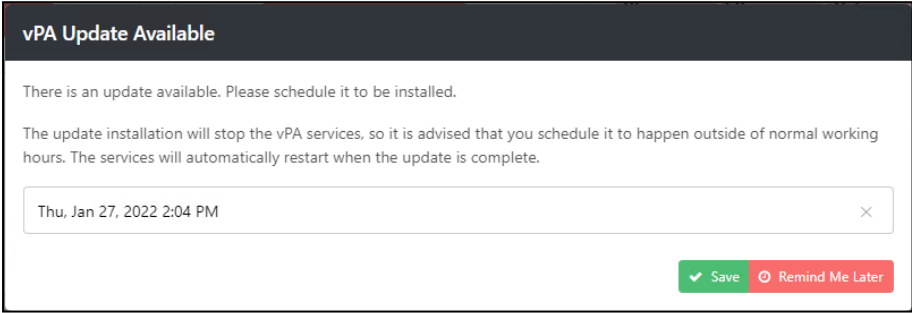
When users with the role Payroll Department Admin logs into the vPA website, and an update is available, the user will be shown the following message informing them an update is available. This message includes the ability to schedule the update:



Click in the box **Install Not Scheduled**, you will then be shown a calendar to select **Now** or a specified date and time:



Once you have selected the date and time, click **Save**:



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:

Component Version Numbers Refresh

SPA Current: 2.3.16.0 Update Available: 2.4.1.0	vPA Resource Server Current: 2.3.17.0 Update Available: 2.4.0.0
vPA Scheduling Engine Current: 2.3.9.0 Update Available: 2.4.0.0	Payroll Resource Server Current: 2.4.3.0 Update Available: 2.4.7.0
vPA Auto Updater Current: 2.3.5.0 Update Available: 2.4.0.0	

Check For Updates ⓘ

Last Check:
Thu, Jan 27, 2022 2:02 PM

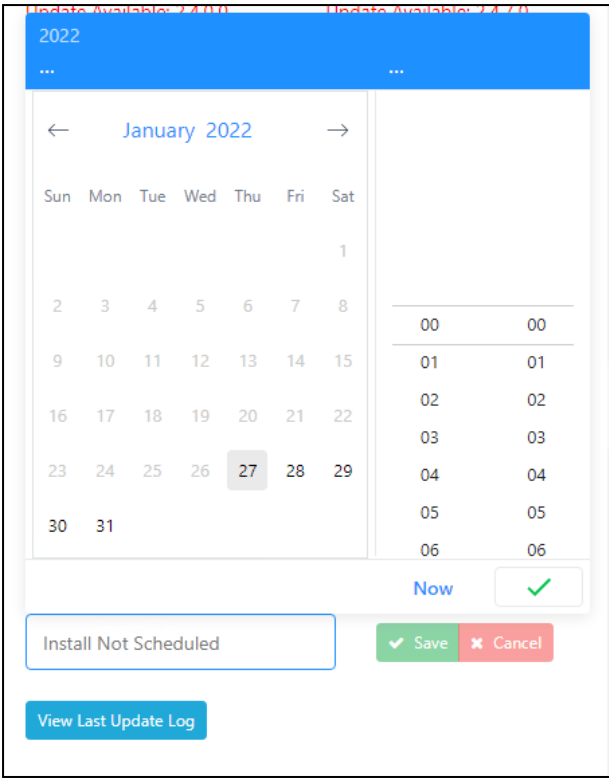
Next Check:
Tue, Feb 1, 2022 10:00 AM Save Cancel

Install Updates ⓘ

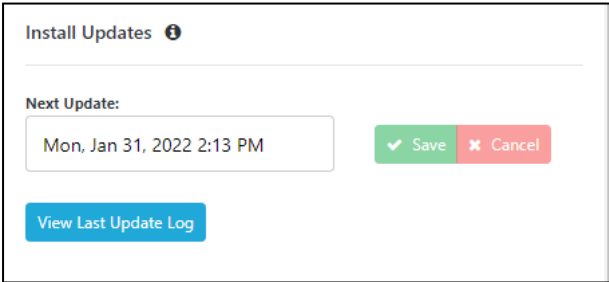
Next Update:
Install Not Scheduled Save Cancel

View Last Update Log

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**:



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.

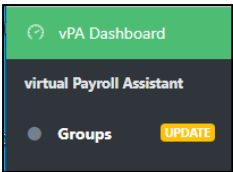
Update Process

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:

Groups (Advanced Filters Applied)

Search [Search] [Clear] Status: Enabled - Sorted: Name - By: [Filter]

Name	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 +

Showing record 1 to 8 of 8 items

Export as CSV Export as XLSX

Expand the group by clicking on the + sign:

Groups (Advanced Filters Applied)

Search [Search] [Clear] Status: Enabled - Sorted: Name - By: [Filter]

Name	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 -

Edit Delete Disable Update Process

Click on the action **Update Process**.

Update Process Screen

Update Process - Monthly - Changes - End of Month (Monthly - Changes - End of Month) Help Save Discard

The template that this process was originally copied from has been updated. Please review the changes below and confirm whether you want to apply the updates to your process.

Template Name: Process Payroll - Monthly Template Modified Date: 26-Feb-2021 13:57

New & Updated Number of reviewed changes: 0/8

Property Name	Current Value	New Value	Apply Change	Change Details
● Upload payslips and P45s to myePayWind	Upload payslips and P45s to myePayWindow	Upload to myePayWindow	<input type="checkbox"/> NO	ⓘ
Branch Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	ⓘ
Cost Centre Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	ⓘ
Department Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	ⓘ
Employee Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> YES	ⓘ
Employee Anonymisation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> YES	ⓘ
P45s	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> YES	ⓘ
Documents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	ⓘ

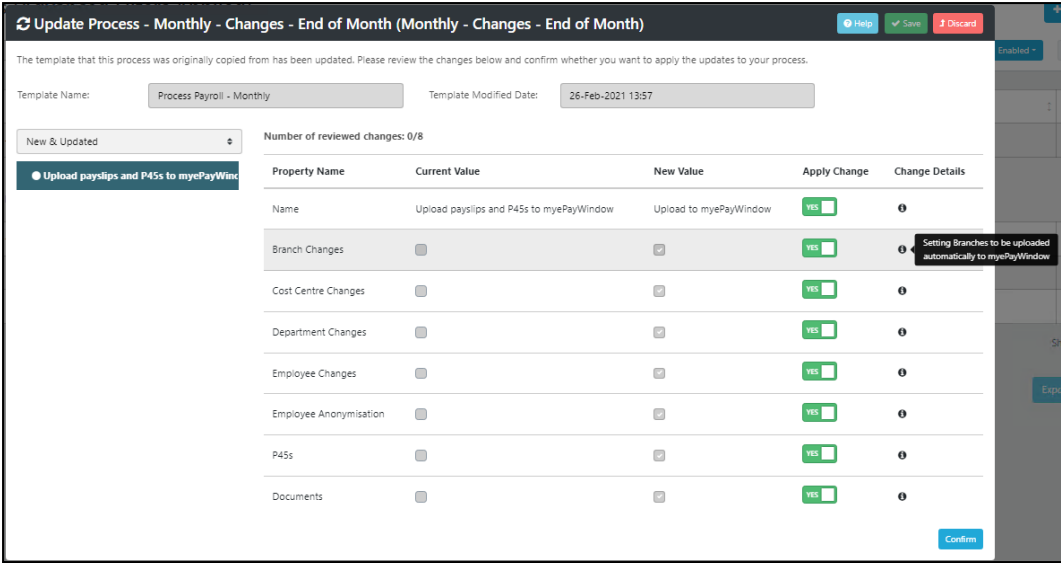
Confirm

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.

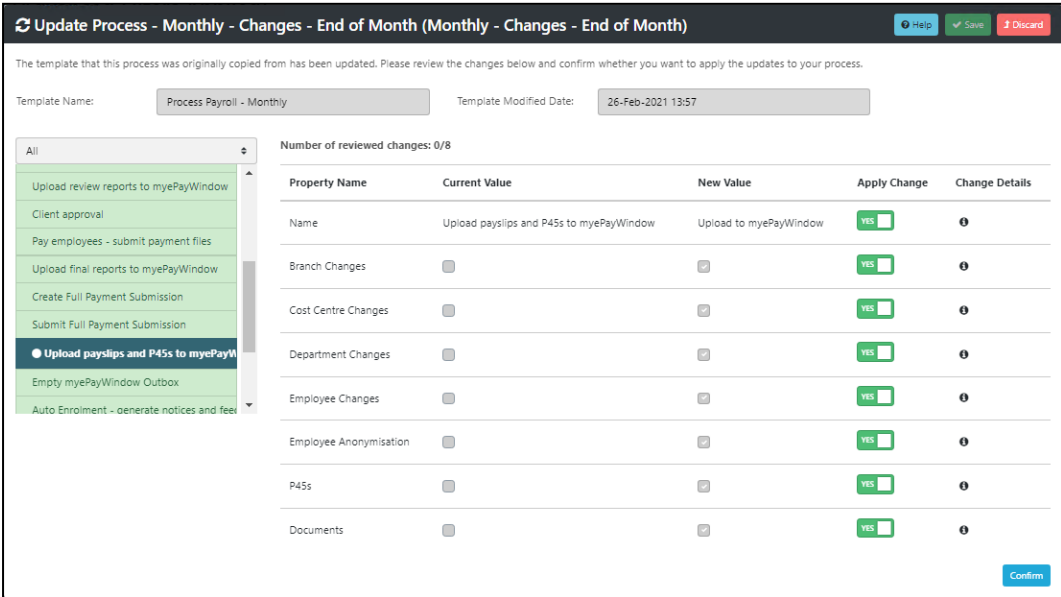
The left side of the screen shows the step changed, for the highlighted step the right side shows changes to the current value and the new value. There is a **Yes/No** button for you to choose whether to apply the step change or not, this defaults to Yes. To accept the change(s) click on **Confirm**, 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**:



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:



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

Property Name	Current Value	New Value	Apply Change	Change Details
Name	Upload payslips and P45s to myePayWindow	Upload to myePayWindow	<input type="checkbox"/> NO	i
Branch Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	i
Cost Centre Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	i
Department Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	i
Employee Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> YES	i
Employee Anonymisation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> YES	i
P45s	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> YES	i
Documents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> NO	i

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:

Highlight a step on the left, information about the step will be shown on the right:

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:

Update Process - Monthly - Changes - End of Month (Monthly - Changes - End of Month) Help Save Discard

The template that this process was originally copied from has been updated. Please review the changes below and confirm whether you want to apply the updates to your process.

Template Name: Template Modified Date:

New & Updated Number of reviewed changes: 0/8

- Upload payslips and P45s to myePayWind

Property Name	Current Value	New Value	Apply Change	Change Details
Name	Upload payslips and P45s to myePayWindow	Upload to myePayWindow	<input checked="" type="checkbox"/>	0
Branch Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
Cost Centre Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
Department Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
Employee Changes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
Employee Anonymisation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
P45s	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0
Documents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0

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 your 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**:

Update Process - Weekly - Directors (Weekly - Directors) Help Save 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:

Process Update Available

The process in this group has an update available. You must review the changes before you can proceed to editing the group.

Update Process Cancel

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 read-only, 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.

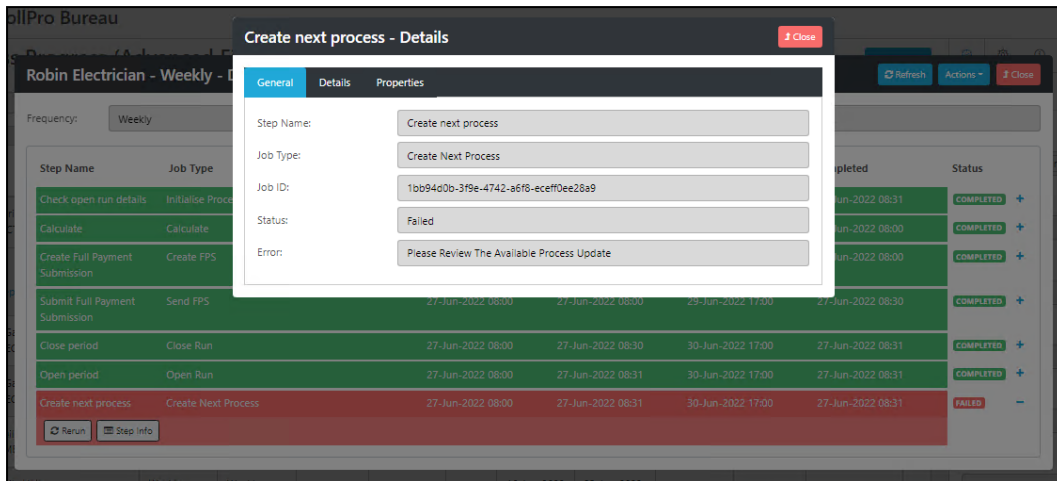
Enable Disabled Process – Process Update Required

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:



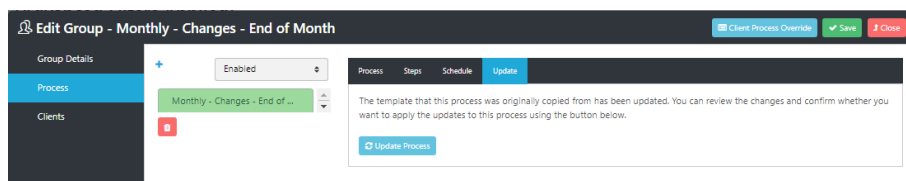
You will need to perform the **Update Process** and then once complete, **re-run** the **Create Next Process** step.

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:



- **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:

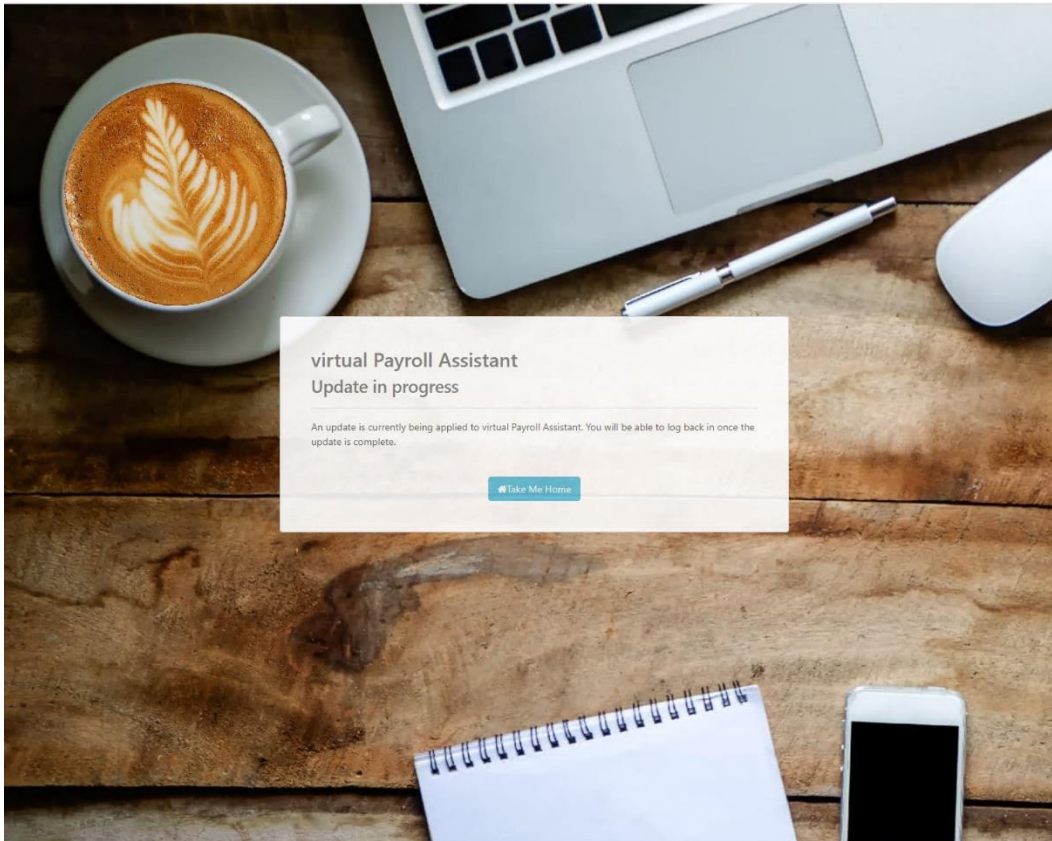
- Within the **Group Edit** form under the **Process** tab the **Update** tab is hidden.
- **Groups** menu indicates **Update** is available if Groups requiring an update.

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.



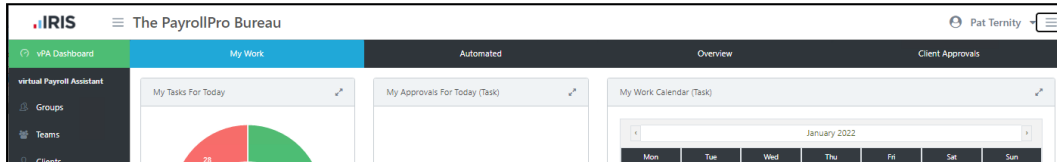
Once the update is complete, click on Take Me Home and login as normal.


Server restart – Schedule Engine Shutdown

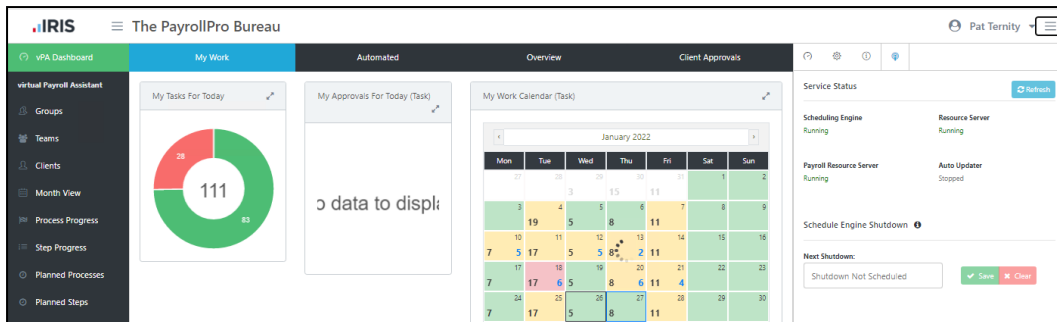
You can schedule when you need to shutdown vPA to perform maintenance on the server that vPA resides, such as the server needing to be restarted or program updates to be installed etc. Using This will cleanly shutdown vPA and ensure any process steps currently running are completed before vPA is shutdown, 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.

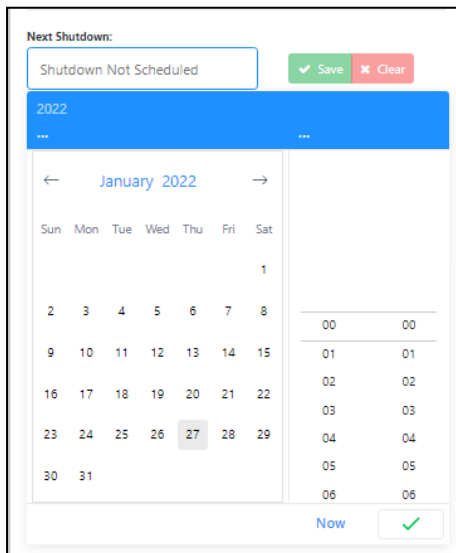
Whilst in the vPA website click on the burger icon top right-hand corner:



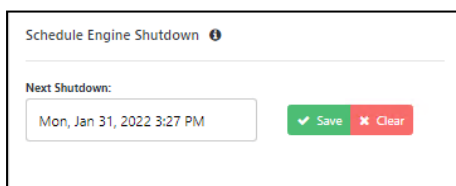
Select the Service Status icon 



Under **Next Shutdown** click into the box **Shutdown Not Scheduled**:



Select the date and time to schedule the shutdown:



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	Job Type	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

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
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	0	17.00	3	8.00

			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.				
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	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		-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
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	0	17.00	2	8.00

			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.				
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	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		-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
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	0	17.00	3	8.00

			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.				
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 and Serious ill health, 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 and Serious ill health, 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 – Flexible drawdown, Pension death benefit, Serious ill health, Pension (General) and Pension (Disability), Termination and Sporting, 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	Type	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.

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Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600	Tel: 0300 200 3200
Fax: 0844 366 7828	Tel: 0300 200 3211 (new business)
Email: helpdesk@ir-efile.gov.uk	

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

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