



Employee Migration User Guidelines

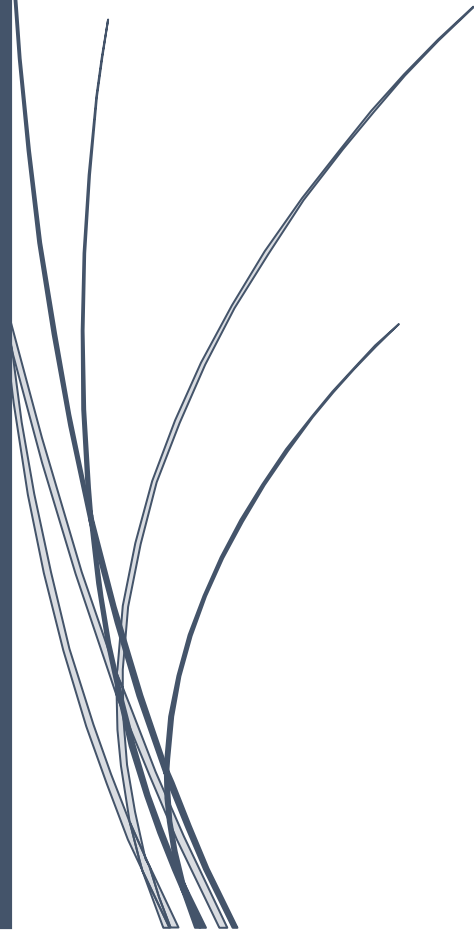


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Migrating your employees to Payroo

Migration to our application is very simple. When you want to switch to our payroll system from any other manual system or software package you will need to migrate your existing employees' details on to our system. You can migrate all your employees' in one shot using a spreadsheet at any point in time within a tax year.

Our application supports 2 methods of employee migration:

- (i) Create employee record using the Add New Employee option or using a spreadsheet.
- (ii) Create and import all the employees' pay details in one shot using the spreadsheet.

The employee migration spreadsheet is user friendly and the columns are linked to a quick help facility for your assistance. For further clarifications you can also refer to our well defined employee migration instruction document.

Points to remember:

- ✓ Refer to the quick tips linked with the spreadsheet columns for assistance.
- ✓ Also refer to the instruction document when you fill in the employee migration spreadsheet.
- ✓ Review each and every entry you make in the spreadsheet to avoid mistakes.
- ✓ Save the spreadsheet in a CSV format because you can only upload CSV files.

How to import?

1. Employee migration process for different Payroo applications

We now look into how to import employee details to the three different applications of Payroo. There isn't any much difference in the procedure, only some variation in the initial steps that you need to follow for the two applications (Standard Payroo Internet Payroll, Payroo Pay Bureau). Follow the appropriate procedure for the Payroo application you are using.

1.1 Standard Payroo Internet Payroll

From the tasking zone of standard Payroo Internet Payroll click on 'Import data' under 'Others'. Here you can import the employee data of a particular employer.

Road Map:

Others->Import Data

The screenshot displays the Standard Payroo Internet Payroll interface. At the top, there is a navigation bar with tabs: Employer / Setup, Employee, E-Filing RTI, PayRun, Finance, Pension, Reports, and Others. The 'Others' dropdown menu is open, showing options: De-List Employee, Recover Employee, Rollback, Import Data (highlighted with a red box), Switch to Other Application, and Start New Tax Year. The main content area shows 'Dashboard - Weekly Payrun' for 'Demo Employer Limited'. It indicates 'You are now in RTI Payroll (Tax Year : 2015)'. Below this, there is a section for 'Week 42 Current Tax Period' with a 'To Process Pay Period Week 42 (18-01-16 to 24-01-16)' dropdown and '2015 - 16 Current Tax Year'. A table below shows the status of various tasks:

Process Payrun	Payrun Processed	Pre-YTD Reports	YTD Committed	FPS E-filed	EPS E-filed	Bulk Payrun	Employer Report
Process >	✓	✓	✓	✓	✗	Process >	View / Print

At the bottom, there is a section 'Click below to process other pay frequency' with buttons for 'Monthly', 'Weekly', '2 Weekly', '4 Weekly', and a dropdown '< Select other pay Frequency >'.

Fig 1.1.1 Standard Payroo Import data

1.2 Payroo Pay Bureau

In the Bureau application you can migrate employees' in bulk. Your Employer/Client/Branch reference number is used as a key to identify the different clients. This helps you to migrate multiple clients' employees' in a single upload process.

Employees' can be migrated into the Bureau application in two different ways

- (i) **'Import Data'** under 'Bureau Details' from the Bureau main page. Here you can import employees' for any Client/Employer under Bureau at the same time.

Road Map:

Bureau main page ->Bureau details->Sign In password->Import Data

Row No.	Client Name	Client Details	Current Employees	Status	Process	Process	Remove Client	P11D Tax Year	PAYE / CIS Tax Year
1	Pay Bureau Itself Limited	Enter	21	Active	P11D	CIS		2014 - 15	2014 - 15
2	Demo Client Ltd. - 2	Enter	65	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
3	Demo Client Ltd. - 3	Enter	12	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
4	Demo Client Ltd. - 4	Enter	44	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
5	Demo Client Ltd. - 5	Enter	32	Not Active	P11D	CIS	Remove	2014 - 15	2014 - 15
6	Demo Client Ltd. - 6	Enter	65	Active	P11D	CIS	Remove	2014 - 15	2014 - 15

Fig 1.2.1 Bureau Main Page 1

Tel. No. : 01234 456789 Fax No. :
E-Mail : Website :

Bureau Contact Details	<input type="button" value="View / Edit"/>	Bureau Customisation	<input type="button" value="View / Edit"/>
Bureau Own Payroll	<input type="button" value="Maintain"/>	Bureau Own P11D	<input type="button" value="Maintain"/>
Bureau System Administrator Details	<input type="button" value="View / Edit"/>	Bureau System User Details	<input type="button" value="View / Edit"/>
Former Clients	<input type="button" value="View / Edit"/>	Client System User Internet Account	<input type="button" value="View / Edit"/>
Consolidated Reports	<input type="button" value="View / Edit"/>	Support Request	<input type="button" value="Enable"/>
Import Data	<input type="button" value="Enter"/>	White Label Customisation	<input type="button" value="Customise"/>

Fig 1.2.2 Bureau Import Data Option 1

(ii) 'Import Data' under 'Others' option from the tasking zone. Here you can import the Employee details for a specific Client/Employer only.

Road Map:

Client Details->Others->Import

Bureau Main Page ?

Demo Bureau Limited

Good Evening Mr.Robert Redford, Tax Period - Year: 2014 - 15

Start Date: 06/04/2014 End Date: 05/04/2015 Date/Time: 27/03/2015 18:24:04

[Click here for RTI Tutorial](#)

[Bureau Details](#) [Add New Client](#) [Admin Payrun](#)

Row No.	Client Name	Client Details	Current Employees	Status	Process	Process	Remove Client	P11D Tax Year	PAYE / CIS Tax Year
1	Pay Bureau Itself Limited	Enter	21	Active	P11D	CIS		2014 - 15	2014 - 15
2	Demo Client Ltd. - 2	Enter	65	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
3	Demo Client Ltd. - 3	Enter	12	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
4	Demo Client Ltd. - 4	Enter	44	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
5	Demo Client Ltd. - 5	Enter	32	Not Active	P11D	CIS	Remove	2014 - 15	2014 - 15
6	Demo Client Ltd. - 6	Enter	65	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
7	Demo Client Ltd. - 7	Enter	12	Active	P11D	CIS	Remove	2014 - 15	2014 - 15

Fig 1.2.3 Bureau Main Page 2

Employer / Setup ▶ Employee ▶ E-Filing RTI ▶ PayRun ▶ Finance ◀ Pension ◀ Reports ◀ Others ▼

Dashboard - Weekly Payrun ?

Demo Employer Limited

You are now in RTI Payroll (Tax Year : 2015)

For more information on RTI (Real Time Information) click on our FAQ 9 Sec. FAQs can be found at the TOP RIGHT HAND CORNER of our web page.

Week 42 Current Tax Period

Reset if to View / Process other Pay period

To Process Pay Period Week 42 (18-01-16 to 24-01-16)

2015 - 16 Current Tax Year

Process Payrun	Payrun Processed	Pre-YTD Reports	YTD Committed	FPS E-filed	EPS E-filed	Bulk Payrun	Employer Report
Process >	✓	✓	✓	✓	✗	Process >	View / Print

Click below to process other pay frequency

[Monthly](#) [Weekly](#) [2 Weekly](#) [4 Weekly](#) [< Select other pay Frequency >](#)

Others dropdown menu:

- De-List Employee
- Recover Employee ◀
- Rollback ◀
- Import Data**
- Switch to Other Application
- Start New Tax Year

Fig 1.2.4 Bureau Import Data Option 2

2. Download spreadsheet procedure for employee migration

All the procedures hereafter are the same for all the applications of Payroo. Follow the instructions below for any application.

Step 1: From the Import data page click on the **'Employee Data'** link

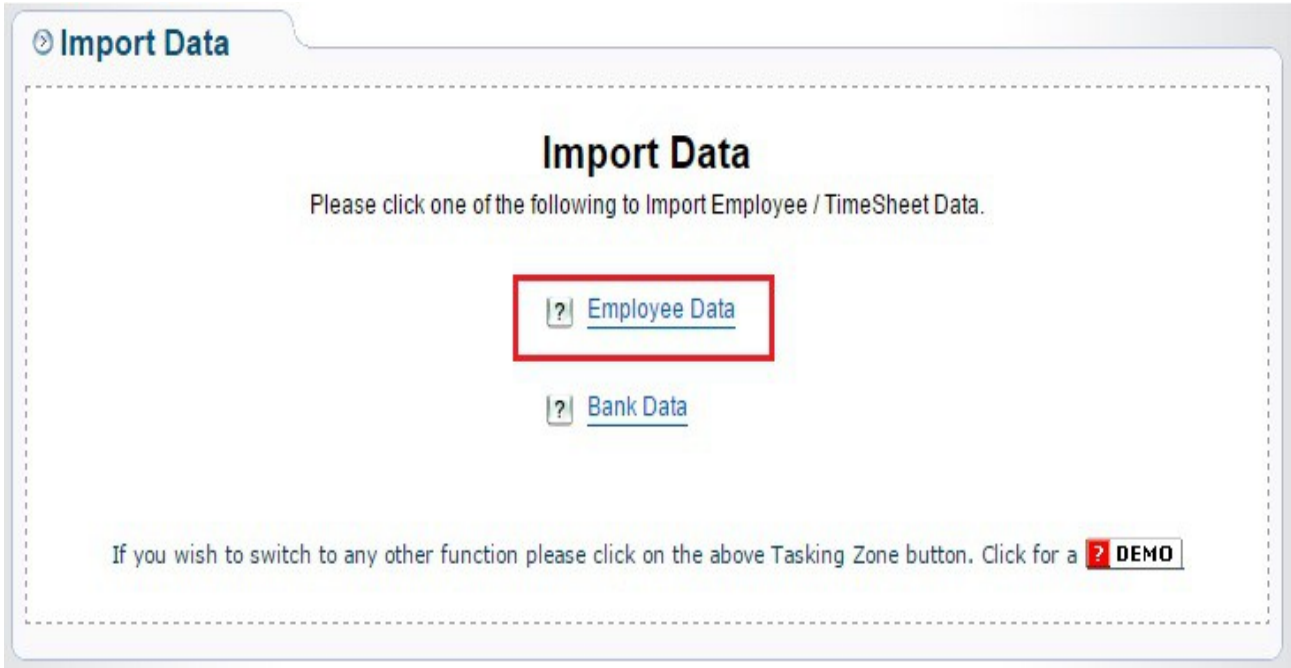


Fig 2.1 Import data

Step 2: Please thoroughly read all the data importing instructions before you proceed to download the template and then click on the **'Click To Continue'** button. Now click on **'Download Spreadsheet-Importing Employee Data'**

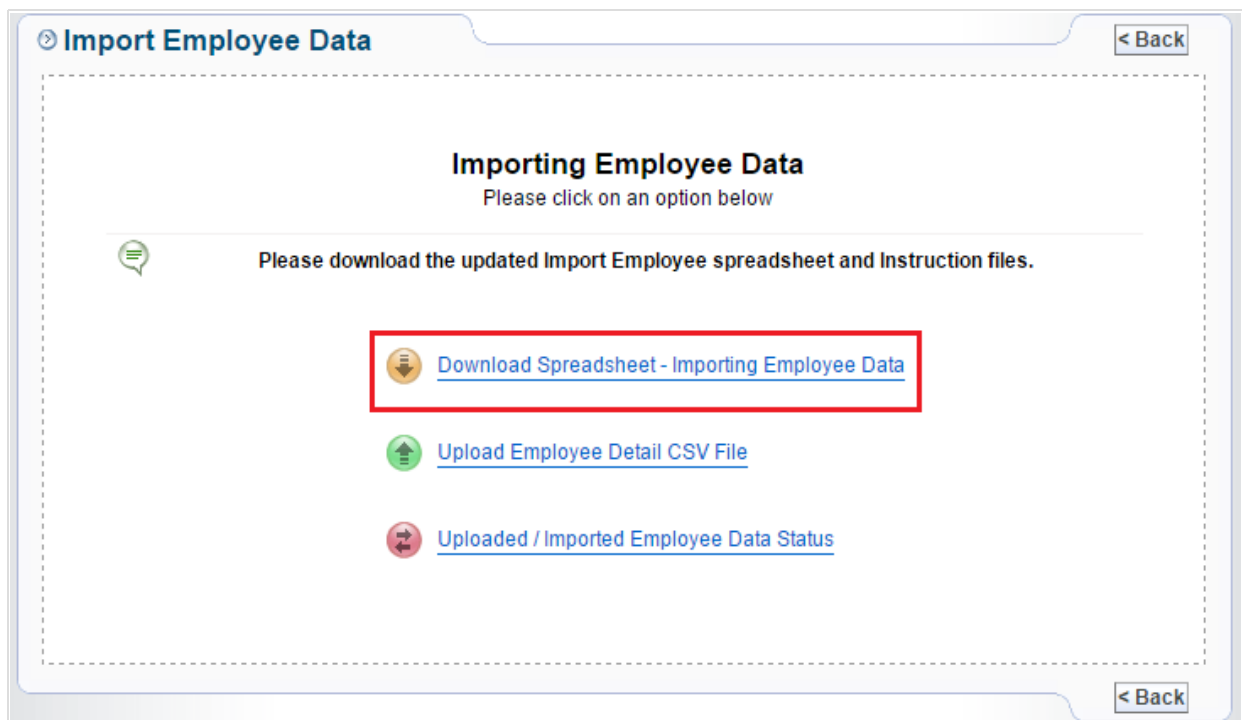


Fig 2.2 Importing Employee Data

Step 4: Select the employee template.

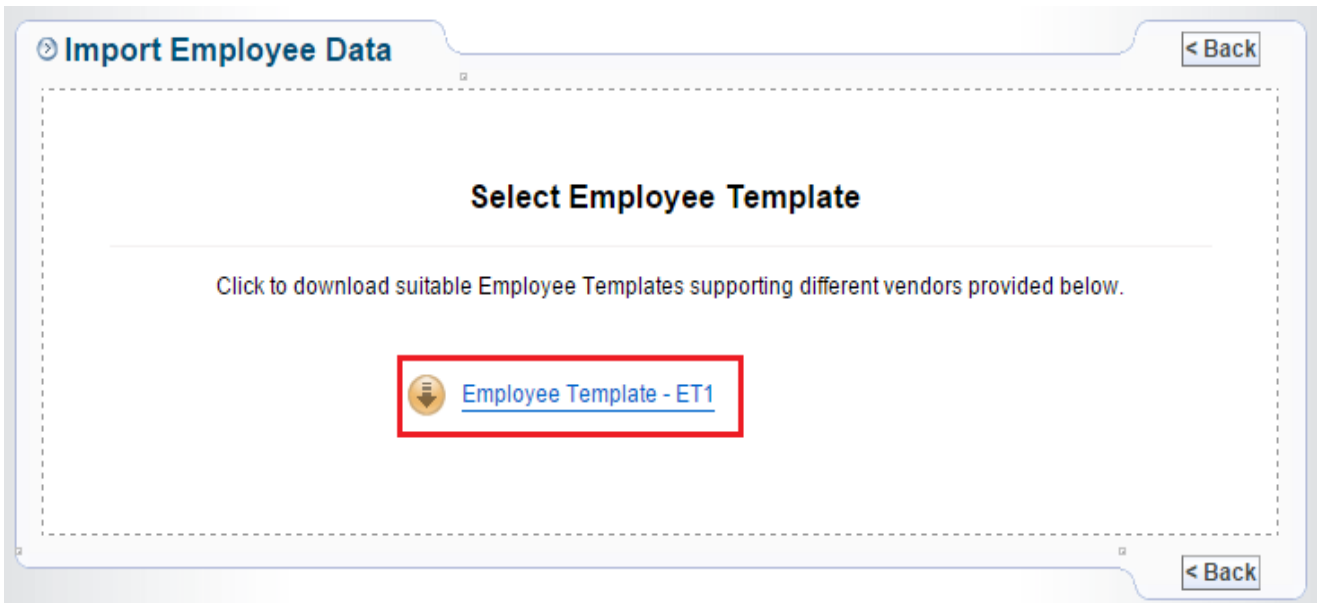


Fig 2.3 Employee Template

Step 5: Click on the 'Instruction for Employee Details spreadsheet' link and download the document. Thoroughly read all the instructions before you proceed to download and fill in the employee migration spreadsheet.



Fig 2.4 Download Instruction

Step 6: Now click on the ‘Employee details Spreadsheet document’ link to download the spreadsheet.



Fig 2.5 Download Spreadsheet

Step 7: Once you download the spreadsheet, you can enter your employee data into the spreadsheet and **save it in a CSV format**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	EE1	EE2	EE3	EE4	EE5	EE6	EE7	EE8	EE9	EE10	EE11	EE12	EE13	EE14
2	Employer / Client / Branch Reference *	Employer / Client / Branch Name *	Employee Works Number / Payroll ID *	Title *	Surname *	First Forename *	Second Forename	Employee Address Line 1	Address Line 2	Address Line 3	Address Line 4	Post code	Country	Employee Telephone Number
3	Client1	Demo Client 1	WKS-001	Mr	Redford	Robert		777 Lucky St	London	NW11 9HY	United King	KH67UY	United Kingd	0161 1234 5
4	Client2	Demo Client 2	ABC-001	Mrs	Gilroy	Andy		191 Blanford	Reigate	Surrey RH2	United King	MH43PL	United Kingd	01895 123 4
5														
6														
7														
8														
9														
10														
11														
12														

Fig 2.6 Employee Migration Spreadsheet

Please note:

You can enter the Employer/Client/Branch reference number in the first column of the employee migration spreadsheet. This is a key to identify the client and enables you to upload multiple clients' employees' in a single spreadsheet with their unique client reference associated to each employee.

Follow the road map below to find out your Employer/Client/Branch reference number.

Road Map:

Employer/Setup ->Employer Details-> Employer / Contractor Contact Details-> Employer / Contractor Reference

Employer / Contractor Details ? < Back Edit

View Employer / Contractor Details

Employer / Contractor Reference	CL003
Employer / Contractor Name	Client Login Test
Business Address	Emp mig CHADWELL-ST-MARY ESSEX Middlesex GIR 0AA United Kingdom
Registered Office Address	
Employer / Contractor Tel. No.	020 8731 9981
Employer / Contractor Fax No.	

Fig 2.7 Employer / Contractor Reference

3. Uploading Employee Data CSV File

When you have completed entering your data in the employee migration spreadsheet, the next step is uploading the CSV file. To upload the CSV file you follow the same procedure for downloading the spreadsheet until the 'Import Employees' page.

Please note: It is recommended that you review each and every entry you made in the spreadsheet to avoid mistakes.

Step 1: From the 'Import Employees' page click on '**Upload employee detail CSV File**'.



Fig 3.1 Upload employee detail CSV File

Step 2: Click on browse to upload the CSV file. Then select the appropriate template version and you may also enter a CSV file reference name.

Fig 3.2: Upload CSV File

Step 3: This page shows the Importing data status for all the migrated employees. If the status is **'Pending'**, click on the **'Select to import'** radio button for the respective employee and then click on **'Click to Import'**.

Please Note: If the data is incorrect or not according to the specifications the upload will fail.

Uploaded Date	User CSV File Ref.	Total Employees	Importer Name	Importing Data Status	Details	Select to Import
22/09/2015	004	46	Redford, Robert	Pending	View Remove	<input type="radio"/>
22/09/2015	001	86	Redford, Robert	Upload Failed	View Remove	
22/09/2015	002	71	Dean, James	Imported	View	
21/09/2015	003	46	Dean, James	Pending	View Remove	<input type="radio"/>
22/09/2015	004	46	Douglas, Kirk	Imported	View	
21/09/2015	003	46	Dean, James	Import Failed	View Remove	
21/09/2015	003	46	Dean, James	Imported	View	
22/09/2015	004	46	Douglas, Kirk	Imported	View	
21/09/2015	003	46	Dean, James	Imported	View	
21/09/2015	003	46	Dean, James	Imported	View	

Fig 3.3 Employee Data Status

Step 4: Enter your Sign In password to confirm that the employee details you are importing are correct.

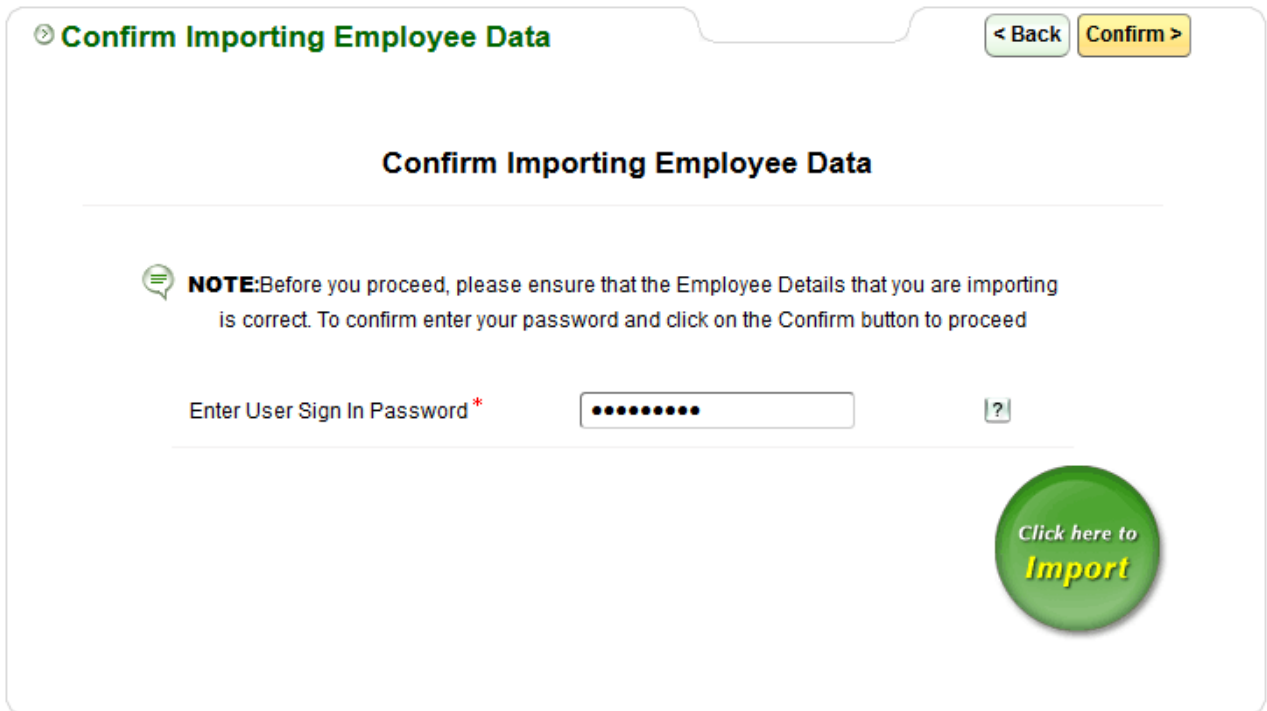


Fig 3.4 Confirm Importing

Step 5: After successful importing of employee data, the page shown below is displayed.

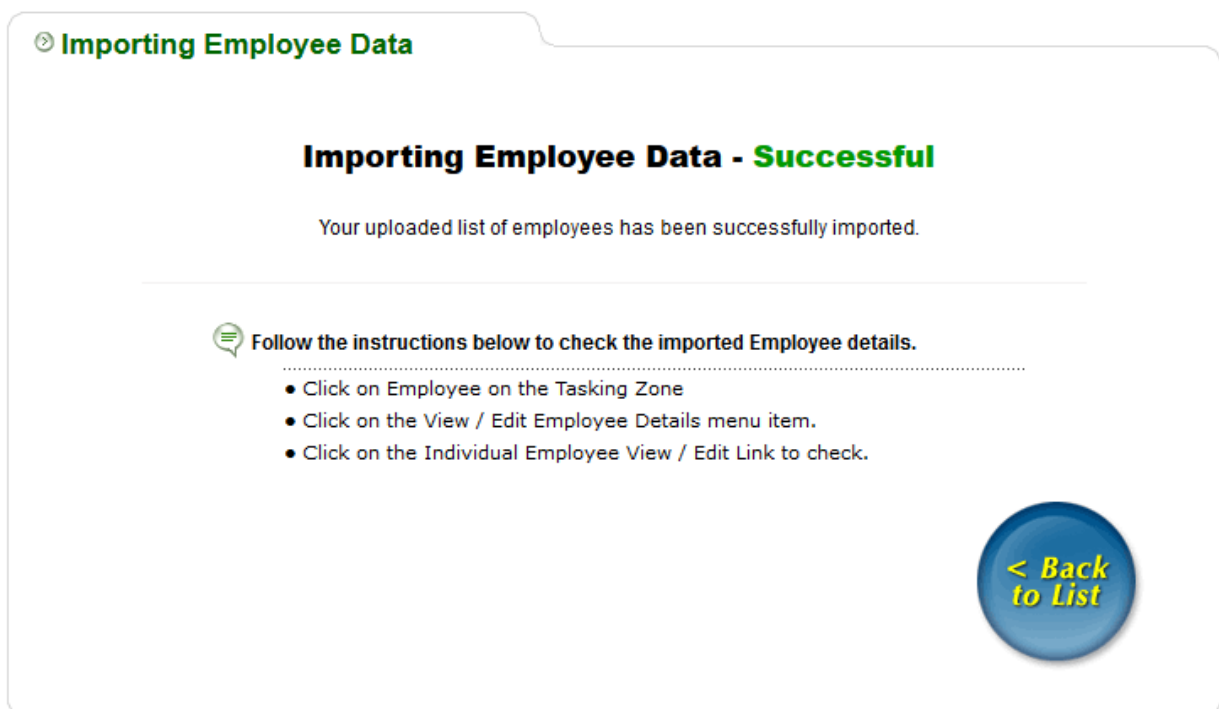


Fig 3.5 Successful Importing

Employee Login Demo

This demo shows employee Account activation and log in demo. Employee can Log In to his / her account and view / Edit his / her personal details, Emergency contact details and print P11D, P9D summary. Employees can Setup the Mobile App Password too.

Please click on the below link to view the demo:

<https://youtu.be/CksJ53D6byc>

To Know More:

(For more information about our products and services, please contact our Support Team.)

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