my@PayWindow

Portal user guide

Contents

Introduction

myePayWindow is a payroll processing collaboration Portal for Payroll Professional clients. To use myePayWindow you need to be licensed to use the ePayslips service and have the necessary contractual agreement in place. myePayWindow allows the Payroll Department to continue to upload payslips but extends ePayslips functionality with the ability to securely upload reports and letters to Employers and their Employees. Employer functionality has been significantly extended so that they now have the capability of uploading various documents to their Payroll Department, for example Payroll run data. myePayWindow will be progressively developed to include new collaboration features and these will become available in future releases.

Please contact your account manager or the support team for further details.

Security

As per ePayslips, myePayWindow is a highly secure website and service:

- All traffic to and from myePayWindow is sent via Https encryption
- myePayWindow has a security certificate issued from top level provider; Verisign.
- The Portal is secured behind firewalls and subject to weekly and annual 3rd party security tests
- Portal data and documents (where applicable) are encrypted at rest using TDE, AES128
- All actions carried out on the Portal are audited and traceable to individual user accounts

Passwords must be 8 characters in length and contain 1 upper case, 1 lower case, 1 number and 1 special character. When the password is saved to the database it is not saved in a text format but is encrypted using hashing and therefore is unreadable.

Five successive attempts to login with illegal credentials will lock the user out for 1 hour before allowing another login attempt. Additionally, myePayWindow will automatically log users out after 5 minutes of inactivity in order to minimise the possibility of sensitive data being viewed on unattended devices.

Requirements

In order to be able to use myePayWindow service you must have the following:

- Internet Access
- Installed the latest version of Payroll Professional
- Use an up to date web browser (Chrome, Firefox, Edge, Safari)
- Contractual agreement with Galaxy Payroll to use the myePayWindow / ePayslips services
- A unique Bureau ID key provided by Galaxy Payroll and installed in your Payroll system environment (for existing ePayslips clients this is your ePayslips Bureau ID)

Please refer to the Payroll Professional minimum system requirements available on the support website

Payroll Professional Privileges for myePayWindow

A new set of Privileges have been added to Payroll Professional to help you control how staff users are able to interact with myePayWindow (please refer to the separate help guide on privileges in Payroll Professional) The privileges that can be enabled /disabled are self-explanatory and are as follows:

Allowed (disables all myePayWindow functions)

Register Payroll Department User

Add Payroll department User

Register / Update Employer

Edit Employer User
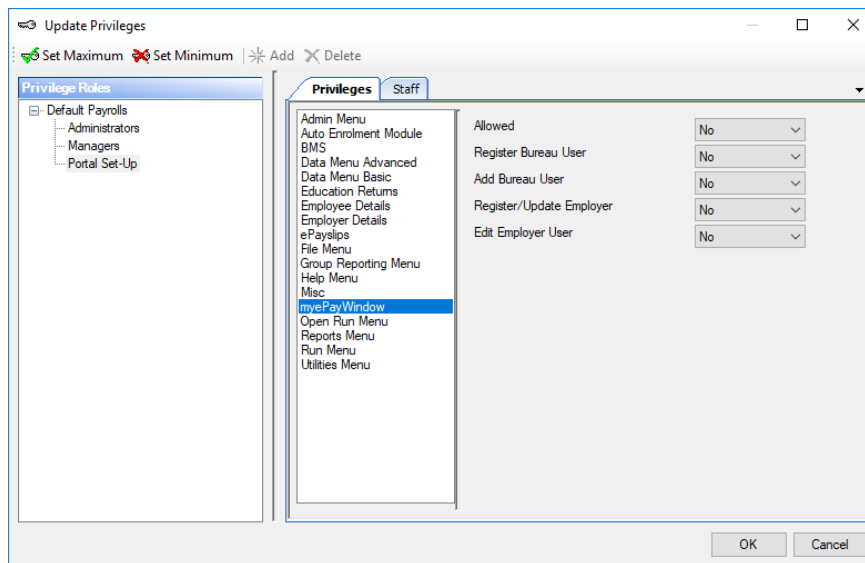
It is not mandatory to use privileges but is recommended good practice. If you use privileges already you will need to decide which privileges you wish to allocate to each Staff user and the **Privilege client groups** you have set-up.

High-level set-up steps

This guide follows a logical step-by-step process in setting up your payroll department to process payroll using the myePayWindow Portal. We recommend that once set-up that you follow these steps for each Payroll/Employer you introduce to the Portal:

- Connect your Payroll department from Payroll Professional and Invite & Register your Staff users from myePayWindow
- Confirm you have the agreement to use the Portal with the Employer
- Connect the Employer and Invite & Register their Employer users from myePayWindow
- Validate that the Employer can access the Portal and see Employees, payslips and data and can upload & receive documents from your payroll department.
- Employer has explained Portal to their Employees and that they will receive invitation emails
- Invite & Register Employees, validate they have registered and can access the Portal
- Create Employer Groups, Roles, assign Privileges and add Staff users
- Process Payroll – exchange documents with Employers as part of the payroll life-cycle and publish payslips and other documents to Employees

Payroll Department Connection and Staff user set-up

Setting-up your Payroll department to use the Portal is a 3-step process:

1. Connect your Payroll departments <u>unique identity</u> to the Portal from Payroll Professional
2. Connect and Invite the Staff users in your Payroll department from myePayWindow to register (verify identity, accept terms and create a Portal user account) via the Portal. Login to Portal.
3. Update your payroll department user Portal security credentials in Payroll Professional

Once these steps have been completed a payroll department user will then be able to connect an Employer and their Employees (via an opened Payroll data file) and invite them to register from Payroll Professional. Once Invited, Employees will be able to create their own Portal accounts and login via the registration process.

Payroll department connection to the Portal in Payroll Professional

To 'Connect' your Payroll department identity to the Portal go to the **Admin** tab in Payroll Professional and click on the **myePayWindow icon**, then **Bureau details**.
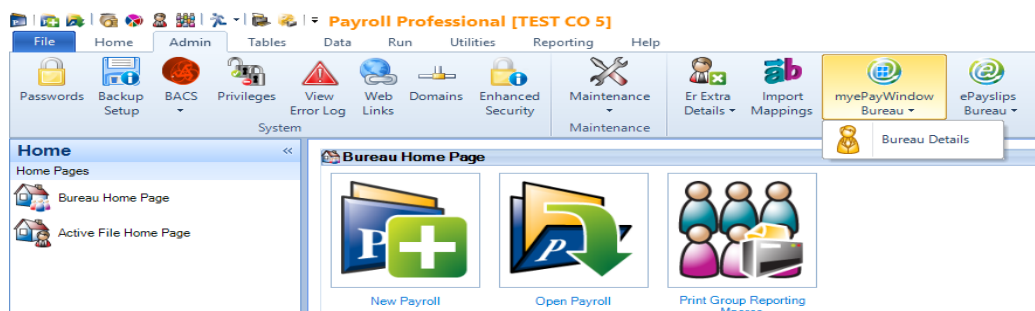
On the Bureau details page make sure that the details shown are correct, if necessary, update the Bureau details ensuring that the following mandatory fields are populated:

Name

Address

Post Code

The myePayWindow section of the Bureau Details (Edit) screen initially shows a red cross indicating the Bureau is not yet connected, click on '**Connect with myePayWindow**' to connect to the Portal.

Once connection has been made you will see the following on-screen notification. Click on **OK** to continue. Note: Licence name will show as your company Payroll Licence name with Payroll Professional.
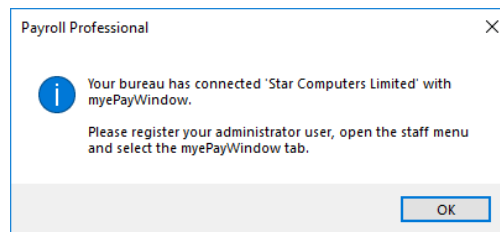
The myePayWindow status section of the Bureau details page will update to show a green tick and a Portal BureauID will populate in the field shown in yellow below. This indicates the Payroll department has now successfully connected to the Portal.
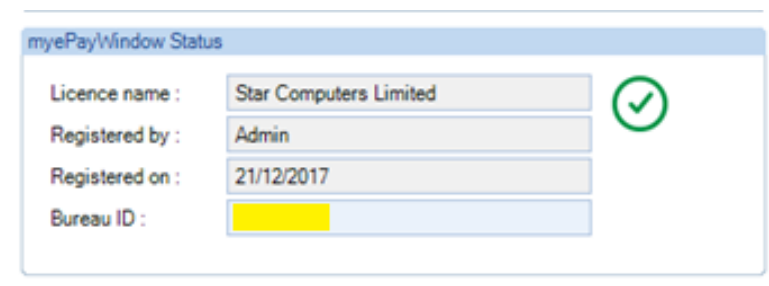
The button options on the Bureau details screen will change from 'Connect' to 'Update' myePayWindow. Any subsequent changes to the Bureau details, for example, a change of address will need to be sent to the Portal to ensure it is kept up to date. Once changes have been made, click the **Update myePayWindow** button.
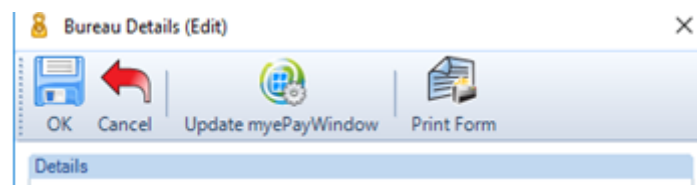
Connect & Invite Staff users from Payroll Professional

With the Bureau connected, you are ready to set up and connect Staff users. Go to the **Admin** tab and select the **Staff** option. Please remember that additional privileges have been added in Payroll to control which users are able to do this)
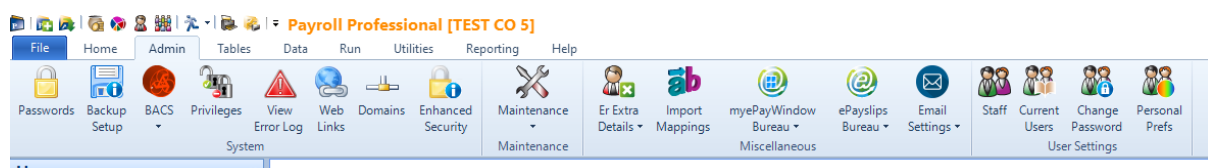
From the **Staff members** list select an existing staff member or click **Add** to set up a new staff user. This screen has been modified to include a Portal Status column.

Note: Prior to connecting any staff users their status will show as 'Not connected'. When there is no internet connectivity or Payroll privileges prevent Portal access, the status will show as 'Not Known'. See Portal Status definitions section.

ID	Reference	Surname	Forename	Portal Status	Invited By	Invited On	Invited	Disabled Date	Last Login
1	ADMIN	Payroll	N	Activated	Admin	22/12/2017 11:2...	Yes		08/02/2018 12:3...
2	2	Bonus	A	Activated	Admin	22/12/2017 11:...	Yes		22/12/2017 11:...
3	3	Vertime	O	Activated	ADMIN	31/01/2018 16:3...	Yes	31/01/2018 16:39...	31/01/2018 15:2...
4	4	Daypay	Holly	Activated	ADMIN	08/02/2018 10:0...	Yes		08/02/2018 11:2...
5	5	Ternity	Pat	Not Connected			No		

Open a Staff user record and **Payroll Login** tab. The following information is mandatory;

Title

Forename

Surname

Address

Post Code

Telephone

On this tab, the Forename and Surname details are used in the individual user verification step in the Portal registration process together with their Payroll password (their Portal 'secret' see below):

For Payroll Professional users to be able to set up their own account on the Portal, they require a Payroll Professional password. This password is required as the user's 'secret' information that needs to be provided when verifying their identity during registration on the Portal. For existing Staff already set up in Payroll Professional with a password, the password field is hidden once set. If the password needs to be reset this field can be enabled via the **Reset Password** icon.

If you use '**Enhanced security**' in Payroll Professional, please be aware of any password complexity rules you may have set for your bureau that modify the payroll defaults.

If you use NT authentication a password field will need to be set for all Payroll Professional users via the **Reset Password** icon. This won't affect their normal login to Payroll Professional via NT authentication but will allow an additional password 'secret' to be added that is required for use with the Portal. These Users now have access to payroll and require privileges set.

Note: If these users require access to myePayWindow they will need to have an account set up in the portal (see below)
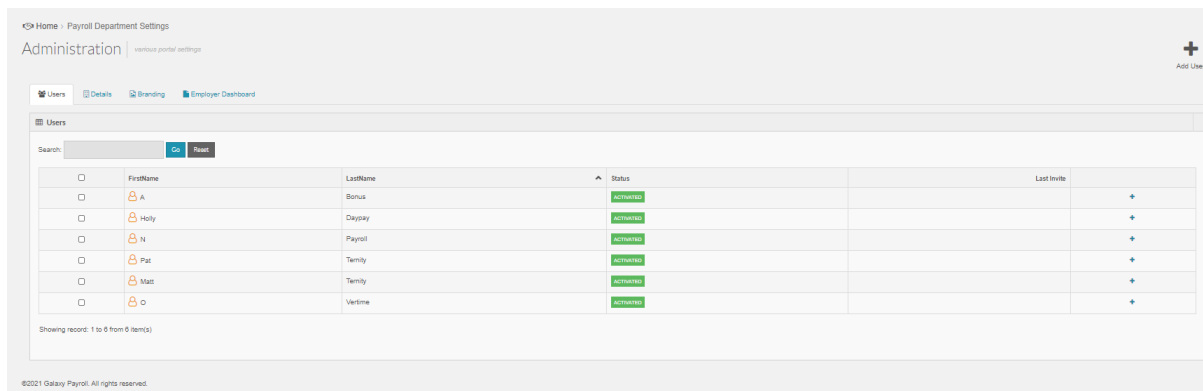
Add & Invite Staff users from the Portal

Once the initial payroll department user (System account) has been set up, additional payroll department users can be added and invited in myePayWindow.

From the left menu, select **Administration**
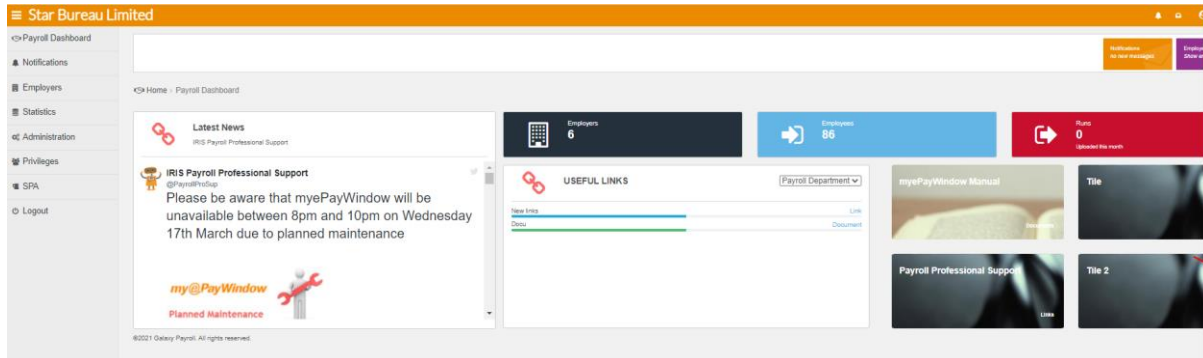
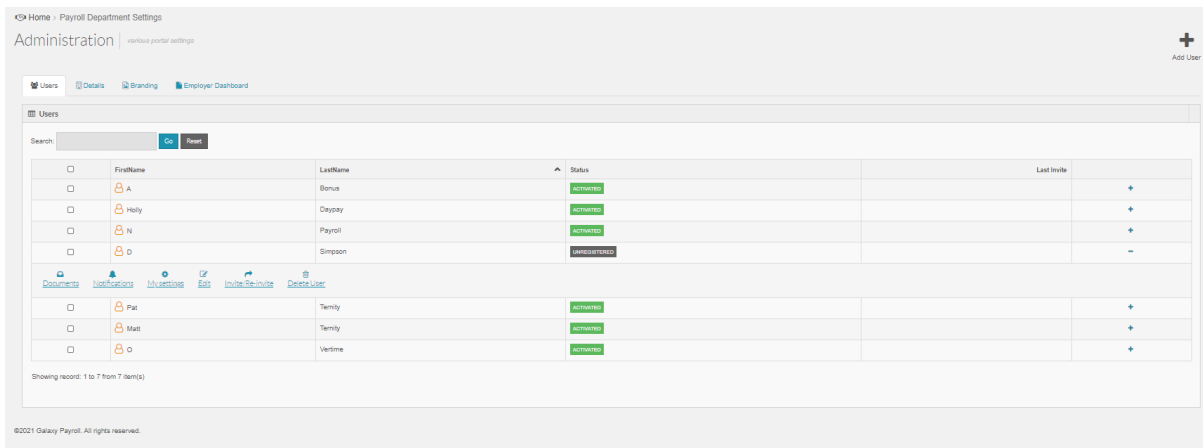From the right-hand side select **Add User** from the **Users** tab

Complete the information for the Payroll Department User. The Secret key can be a word that has been agreed between the first payroll department user. They will need this to complete the registration process. Assign privileges for the user from here. Select **Add** to save.

The new user will appear in the data grid and can be invited. Select the user and **Invite.**

The User will receive a registration email and can start the registration process (Please see section below)
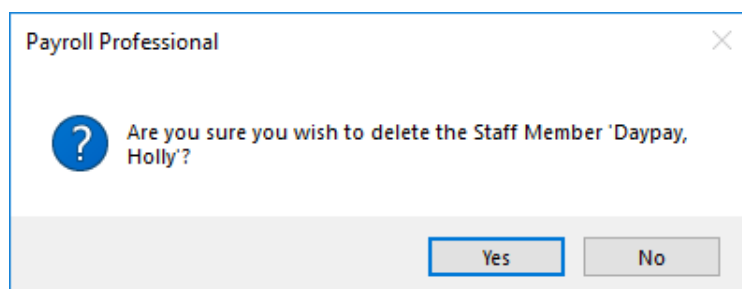
Deleting Staff users

From Payroll Professional

There are restrictions depending upon the User's Portal status. If you need to delete a Staff user go to **Admin**, **Staff, Delete**
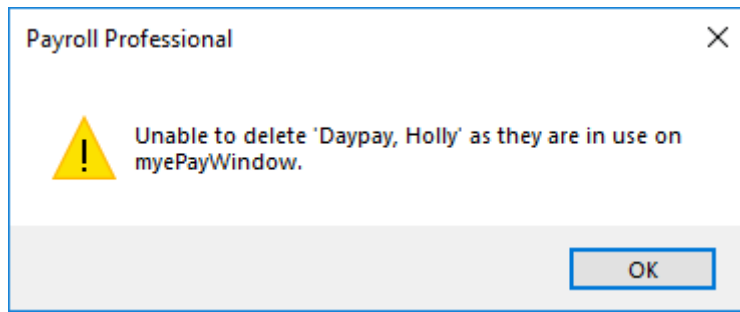
In Payroll Professional Staff Users can only be deleted when their Portal status is 'Unregistered'

If you try to delete a Staff user <u>not in 'Unregistered' status</u>, the following messages appear:

Click, **Yes**

Payroll Professional   ✕

⚠   Unable to delete 'Daypay, Holly' as they are in use on
      myePayWindow.

OK

Click, **OK**

From the Portal

An action to **Delete** a Staff User will only be available for Payroll department users via the Portal **Administration** / **Users** page:

If the User Status is either 'Unregistered' or 'Invited'

Staff User Leavers

If a Staff user leaves the Payroll department and they have an activated Portal user account. The user cannot be deleted but their Portal account should be deactivated. In **myePayWindow** go to **Administration/Users** and select the user. Select **Deactivate**

Note: The Status will change to Deactivated for this User

Payroll department Staff Registration via the Portal

Notes: Step-by-steps are not included for Employer and Employee registration in this guide as the process described in this section is very similar for all Portal users. The only difference is the information required for identity verification during registration (see Verify Identity step)

Once a Staff User has been connected and invited to the Portal from Payroll Professional as described in the previous sections, they will receive an email invitation with a 'link' that will take them to the Portal website to start registration. The invitation link within the email is valid for 20 days.
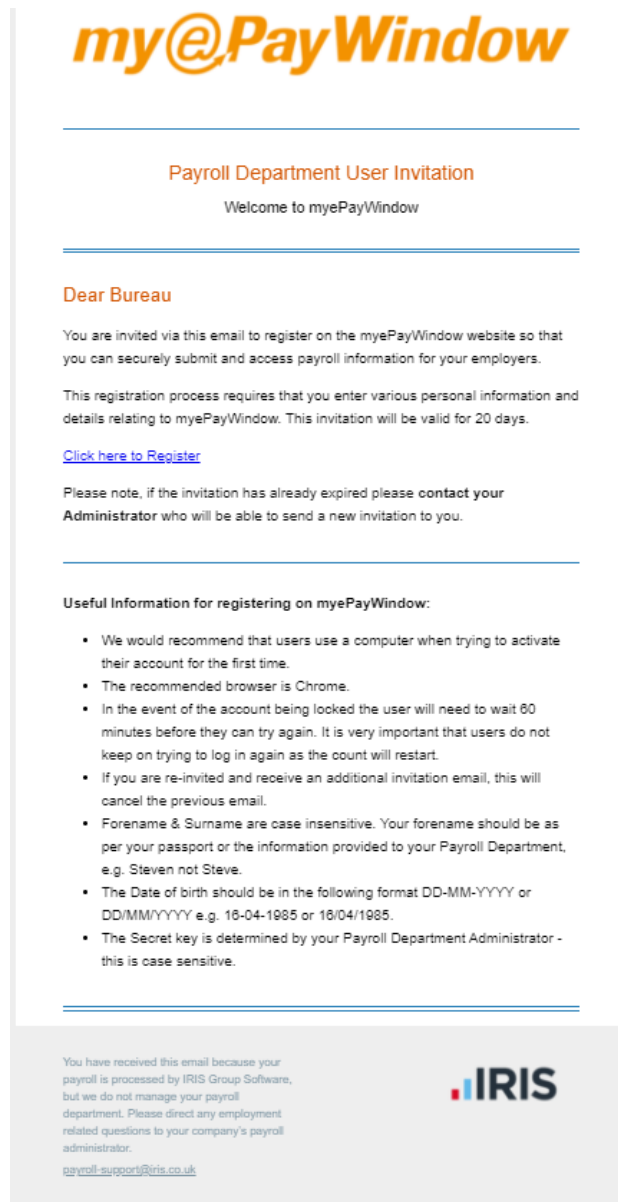
Registration Step 1 – Verify Identity

After clicking on the email link, the user is redirected to the website for the first step of registration: to 'verify' the user is genuine. The details on this screen have been passed from the set up in Payroll Professional. All fields must be entered correctly for the registration process to continue to step 2.

Notes: For Staff Users the 'Secret Key' is their Payroll Professional password.
For Employer Users it is a mutually agreed word.
For Employees it is their NI Number or Passport Number if no NI Number
For CIS Contractors it is their Passport Number or details in the Passport Number field

First Name is as per the Payroll Staff, Employer or Employee record. If you have more than one name in this field, any one of the names can be entered. For example; If you are known as 'John James' either John or James can be entered in the First Name entry field.

If the link within the email has expired, i.e it is more than 20 days after the email was sent, the following message is displayed. In this situation, a new invitation (**Re-Invite from Staff Member**) needs to be sent for the Payroll department user from Payroll Professional.
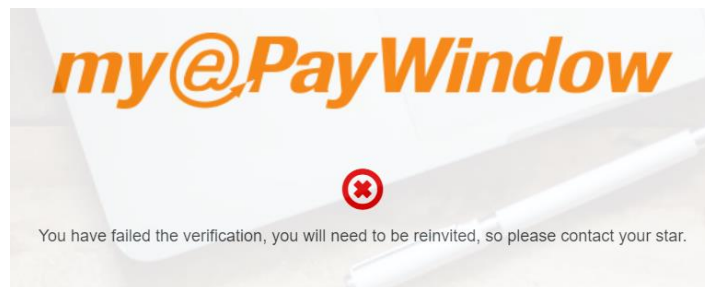
Registration Step 2 – Give consent

On completing Step 1 successfully, the registration process automatically moves to Step 2: confirming consent. By scrolling to the foot of the **Give consent** window and clicking the **'I agree'** button, this will move the process to step 3.
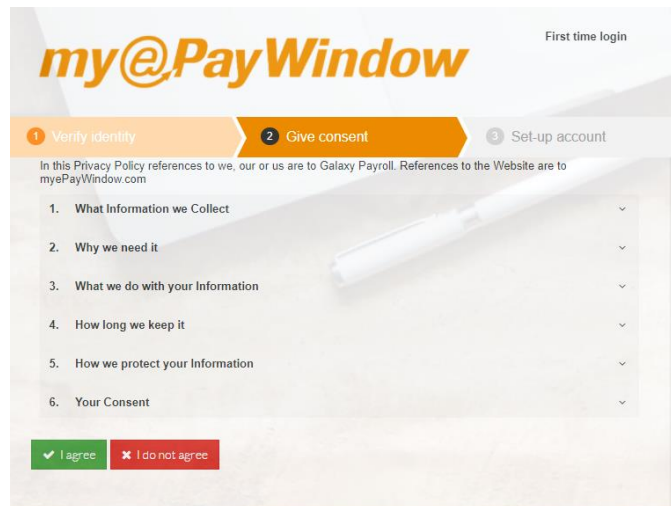
If for any reason consent is not given, the user is warned that the registration process will stop immediately. In this situation, the following message is displayed.

Pending discussions between the user and their 'employer', the user will need to be invited again if they agree to use the portal.

Registration Step 3 – Set-up account

This step involves the User setting the username and password they want to use for the Portal:

Username – minimum 6 characters – maximum 64, an email address can be used if this is more easily remembered. Note: Employers and Employees can use an existing ePayslips UID
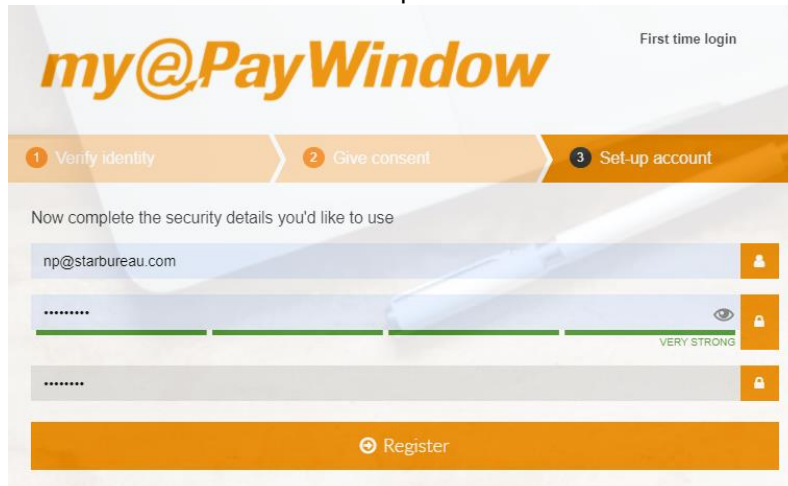
Password – minimum 8 characters, 1 upper case, 1 lower case, 1 special, 1 numeric. Note: Employers and Employees can use an existing ePayslips password

Note: A special character is a punctuation type character from your keyboard (e.g. !, ?, %, =, *)

The password strength for any entered password is shown dynamically on screen, the password strength indicator will only change to green and very strong, when you have entered a password meeting the criteria.
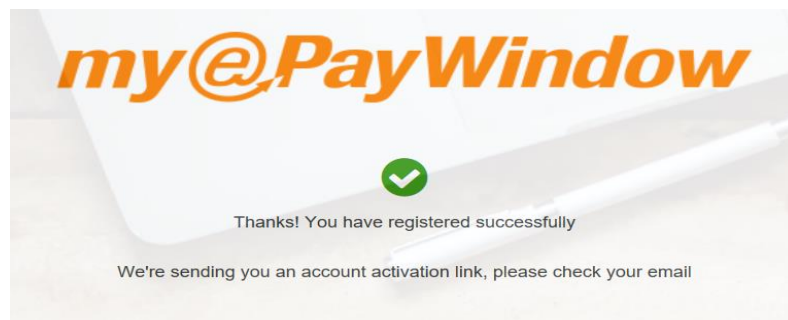The password chosen needs to be entered a second time to verify it. You will not be able to register

until the entered passwords match.

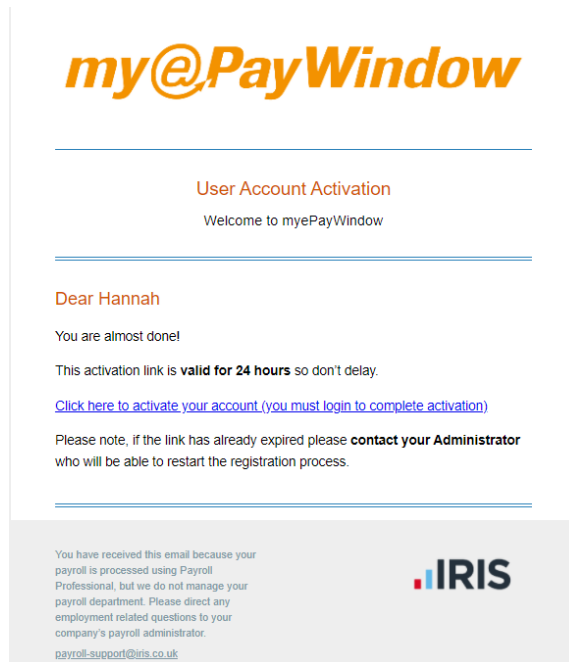On clicking **Register** the following message is displayed.

The user will then receive an email with a link that needs to be followed to activate their user account, so the full registration process is not yet complete.

Step 4 – Activate account

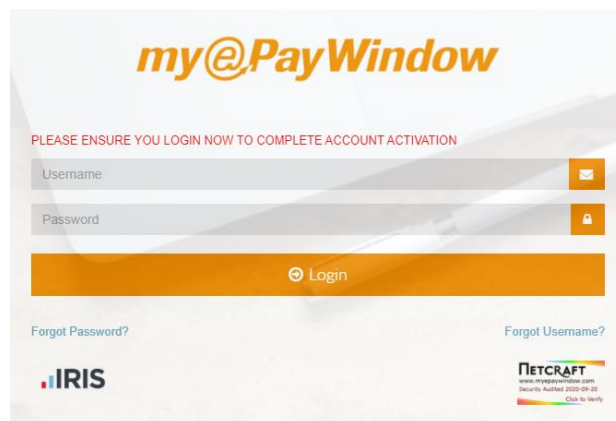The final step in registration involves clicking the activation link in the email sent to the user in Step 3, and then logging in to the Portal.
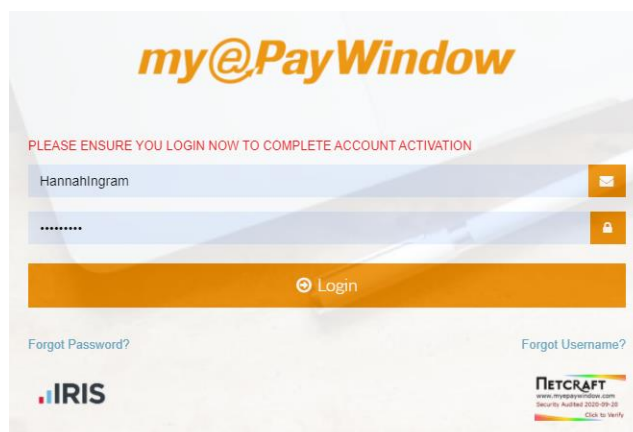
Warning: If the activation link is not used within 24 hours then the registration process can be re-started from link in the initial invitation email (if it is within 20 days, if more than 20 days have passed, they will need to be sent a new invitation)

my@PayWindow

User Account Activation

Welcome to myePayWindow

Dear Hannah

You are almost done!

This activation link is **valid for 24 hours** so don't delay.

Click here to activate your account (you must login to complete activation)

Please note, if the link has already expired please **contact your Administrator** who will be able to restart the registration process.

You have received this email because your payroll is processed using Payroll Professional, but we do not manage your payroll department. Please direct any employment related questions to your company's payroll administrator.

payroll-support@iris.co.uk

.IRIS

On clicking the activation link the user will be taken to the login page on the Portal where they must login to complete registration.


my@PayWindow

PLEASE ENSURE YOU LOGIN NOW TO COMPLETE ACCOUNT ACTIVATION

| Username | ✉ |
| Password | 🔒 |

⊕ Login

Forgot Password?   Forgot Username?

.IRIS   **ΠETCRAFT**
www.myepaywindow.com
Security Audited 2020-09-20
Click to Verify

Using the login details entered during registration, this will complete the registration process.

my@PayWindow

PLEASE ENSURE YOU LOGIN NOW TO COMPLETE ACCOUNT ACTIVATION

| HannahIngram | ✉ |
| •••••••• | 🔒 |

⊕ Login

Forgot Password?   Forgot Username?

.IRIS   **ΠETCRAFT**
www.myepaywindow.com
Security Audited 2020-09-20
Click to Verify

After login, Portal registration is now complete and the user will arrive at their Payroll Dashboard-home page.

For more information and details on using the Portal go to the section – **Using the Portal**
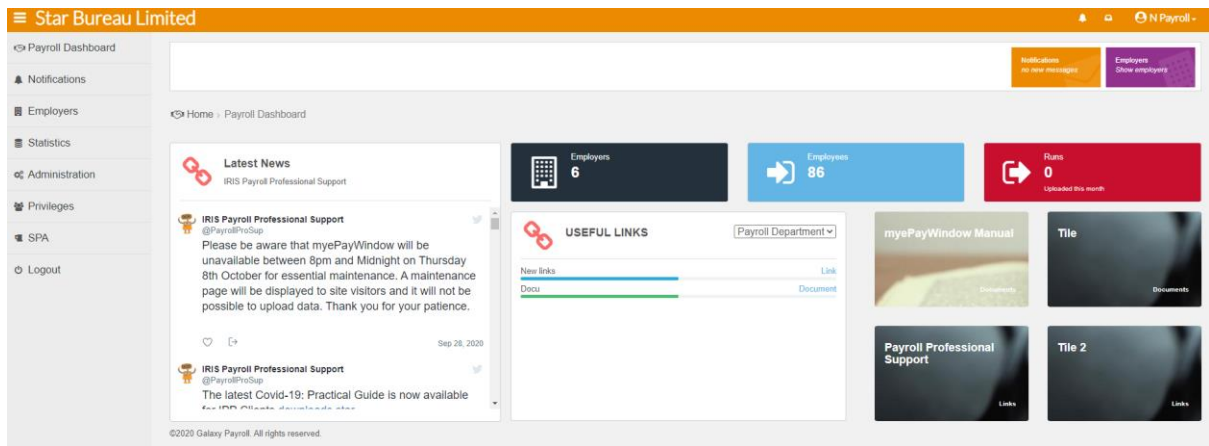
Enforce 2SA/2FA for Payroll Department Users

2 Step Authentication provides additional security for your users and can be enforced for compliance with company policies and Procedures. When 2 Step is enforced as below all Payroll department users will be asked to create a memorable word between 6 & 12 characters in length when they next logon to myePayWindow. Once the memorable word is set up the user will be prompted to select 2 random characters from the memorable word when they logon.

When 2FA is enforced as below all Payroll department users will be asked to scan a QR code using a mobile authenticator. This will require the user to install a smartphone 'Authenticator App' (Google Authenticator/MS Authenticator) to be used as part of the logon process. Once set-up, and after username and password entry, the smartphone authenticator app will be used to generate a code which when entered into myePayWindow, will grant access to their account.

To enforce 2SA for your payroll department users select the Administration/details page. On the details tab select **Enable 2SA** from the dropdown and click **Save settings**

When a Payroll department User next logs in or registers on myePayWindow they will be prompted to enter a new memorable word. Enter the memorable word and click on **Submit**

A payroll department User will see the normal log in screen when they logon to myePayWindow. Complete the Username and password and click on **Login**

Once a username and password is entered a second page is displayed where the user can enter two random characters from their memorable word.
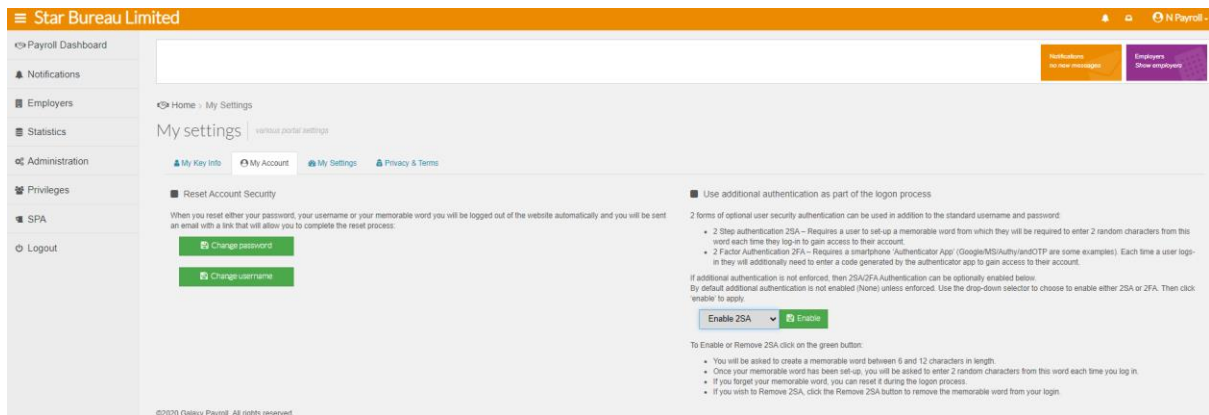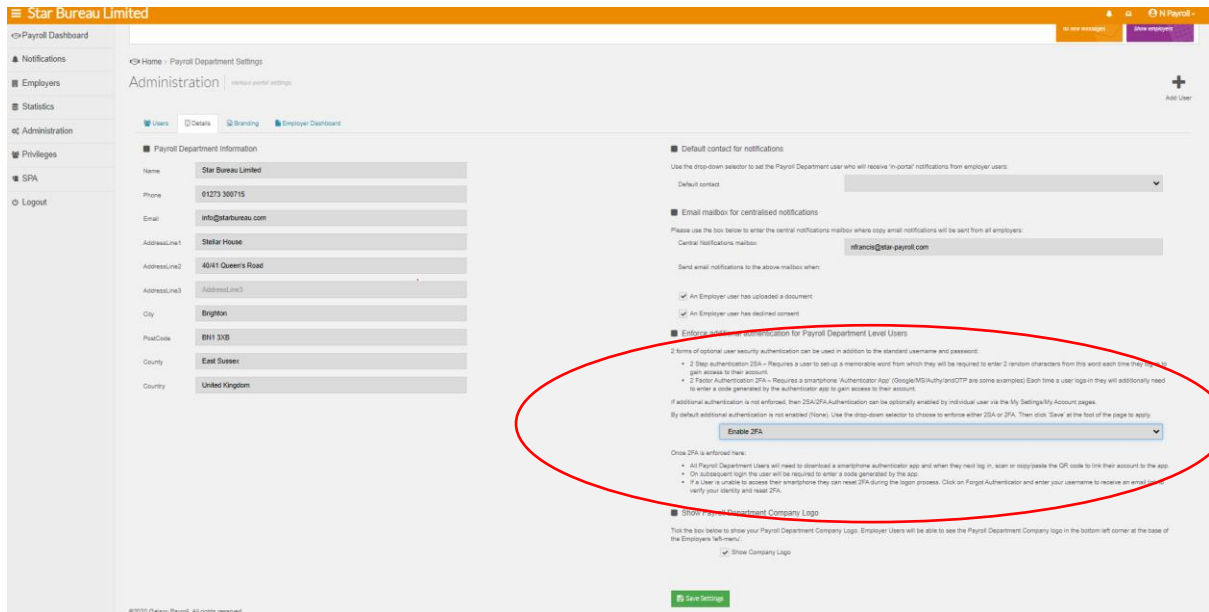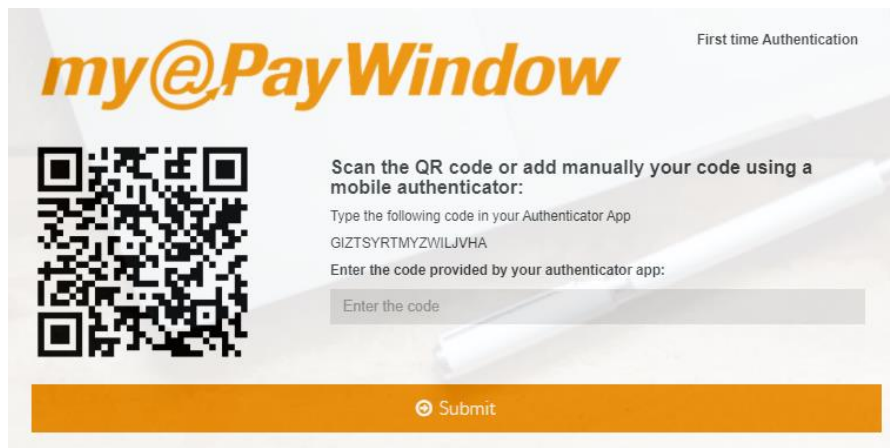
Enter the characters and click on **Login.** To rest the memorable word, click on the **Forgot Memorable Word?** link on the login page to start the reset process
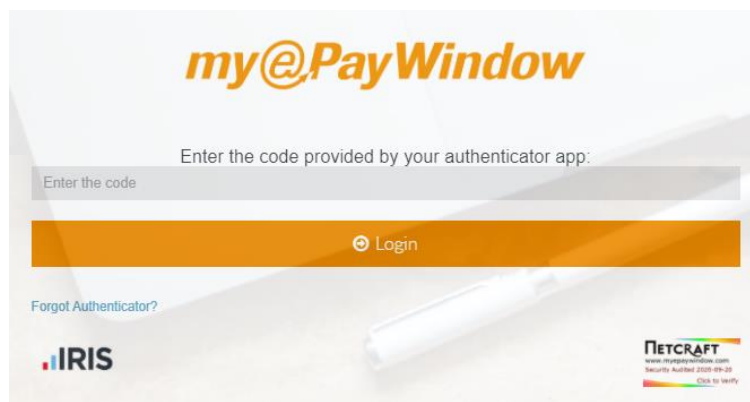
Alternatively, an individual user can enable or remove 2SA provided that 2SA isn't enforced via Administration at Employer/Payroll department Level.

From the Top bar click the username and My Settings
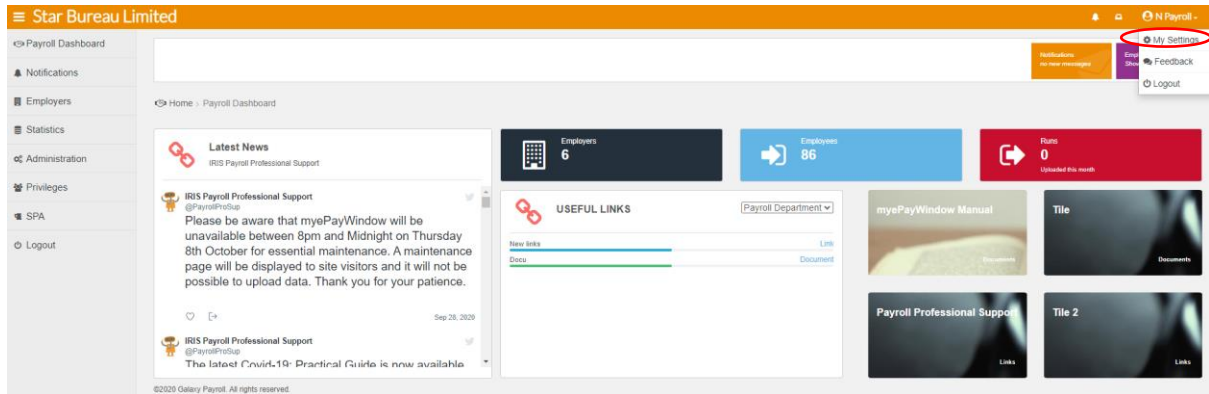
On the My Account tab, click the **Enable 2SA** button.

Note: If the Enabled/Remove button is greyed out, 2 Step Authentication has been enforced and you cannot change this setting.

Click on **Confirm** to set-up your memorable word.

After entering their username & password the user can 'Set-up' their memorable word.

The Memorable word can only contain letters and digits and be between 6 & 12 characters in length.

A second page is displayed where the user can enter two random characters from their memorable word.

Enter the characters and click on **Login.**

To rest the memorable word, click on the **Forgot Memorable Word?** link on the login page to start the reset process

To enforce 2FA for your payroll department users select the Administration/details page. On the details tab select **Enable 2FA** from the dropdown and click **Save settings**

When a Payroll department User next logs in or registers on myePayWindow they will be prompted to scan a QR code (The user will need to have installed a smartphone 'Authenticator App', this will be used each time the user logs in). Enter the returned code and click on **Submit**

A payroll department User will see the normal log in screen when they logon to myePayWindow. Complete the Username and password and click on **Login.** The User will be prompted to enter the code from the 'Authenticator App'

To rest the 2FA process, click on the **Forgot Authenticator?** link on the page to start the reset process

Alternatively, an individual user can enable or remove 2FA provided that 2FA isn't enforced via Administration at Employer/Payroll department Level.

From the Top bar click the username and My Settings
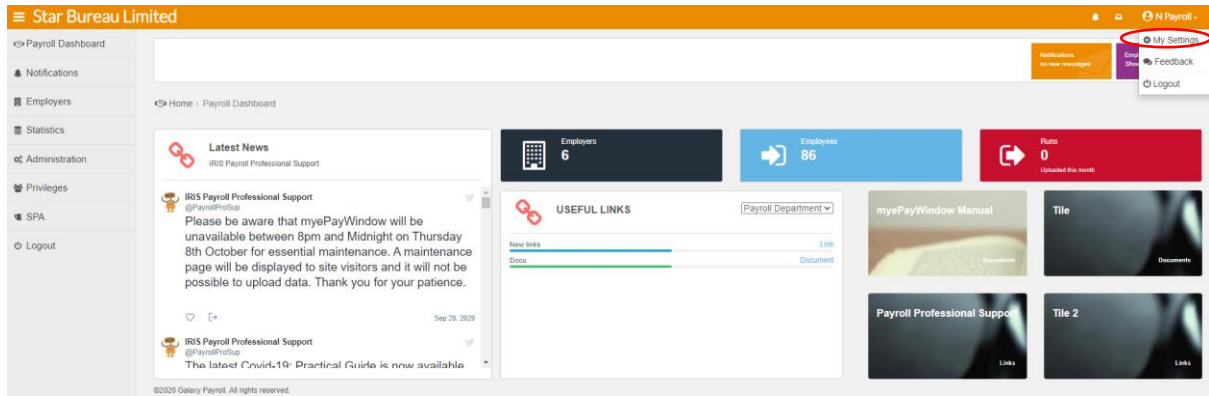
On the My Account tab, click the **Enable 2FA** button.
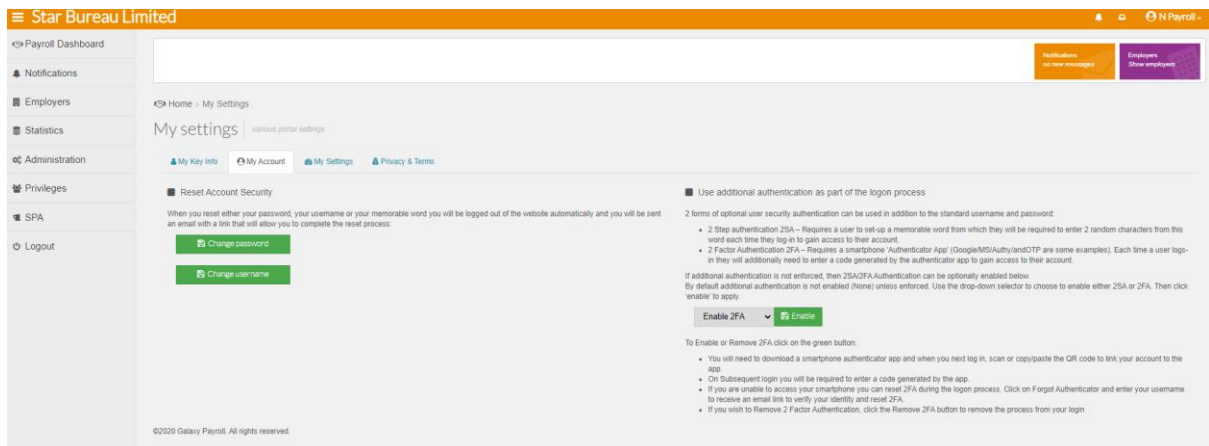
Note: If the Enabled/Remove button is greyed out, 2 Factor Authentication has been enforced and you cannot change this setting.

Click on **Confirm** to enable 2FA.

Enable 2FA

Are you sure you want to Enable 2 Factor Authentication on your account? Click on confirm to be directed to the login page where you will be asked to scan or enter a QR code.

Cancel   Confirm

After entering their username & password the user can 'Set-up' 2FA

Scan the QR code with the smartphone 'Authenticator App' and enter the returned code.
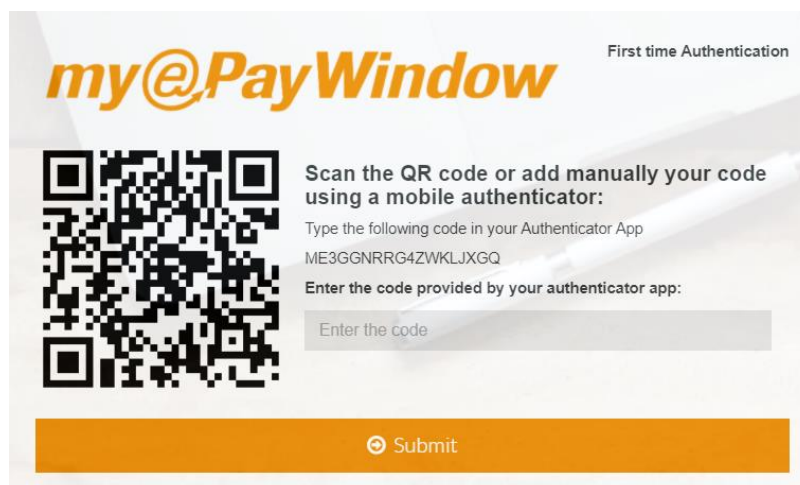
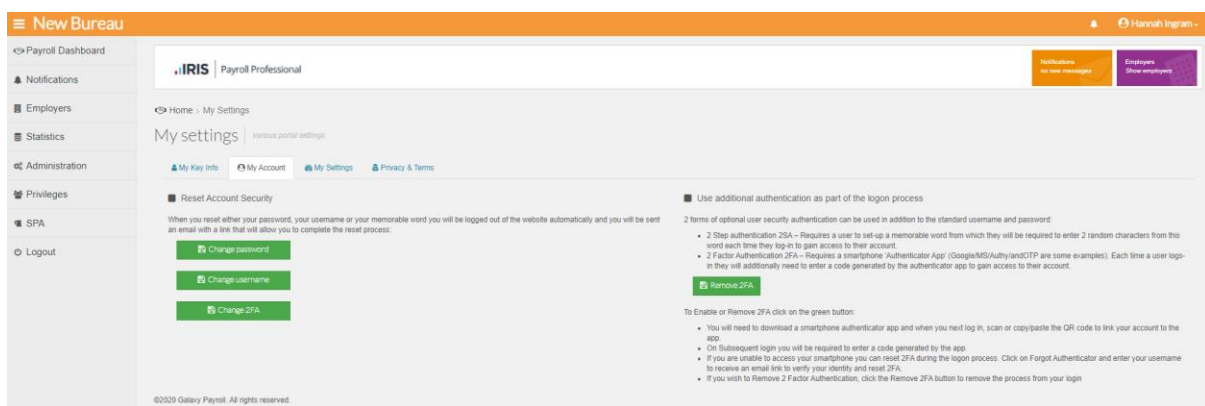On subsequent logins the user will be prompted to enter a code
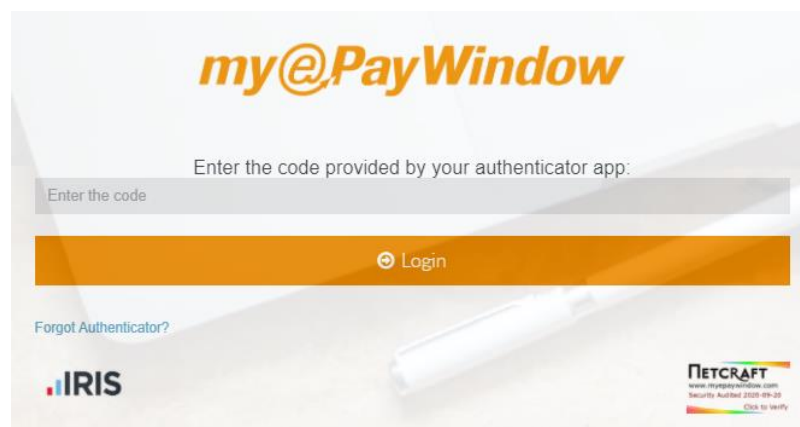
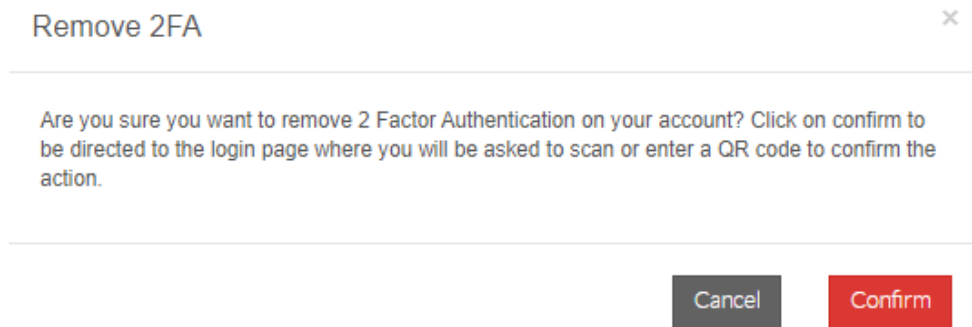To rest 2FA, click on the **Forgot Authenticator?** link on the login page to start the reset process.

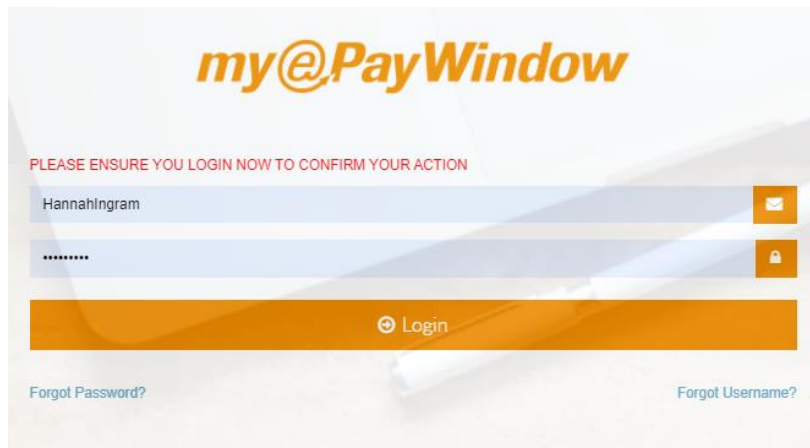To remove 2FA, from the Top bar click the username and My Settings
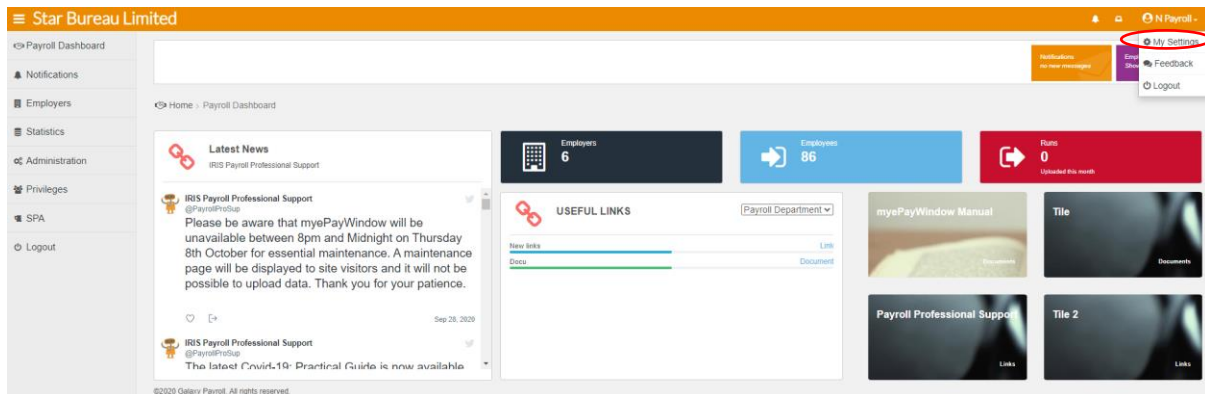
On the My Account tab, click the **Remove 2FA** button.

Click on **Confirm** to remove 2FA.
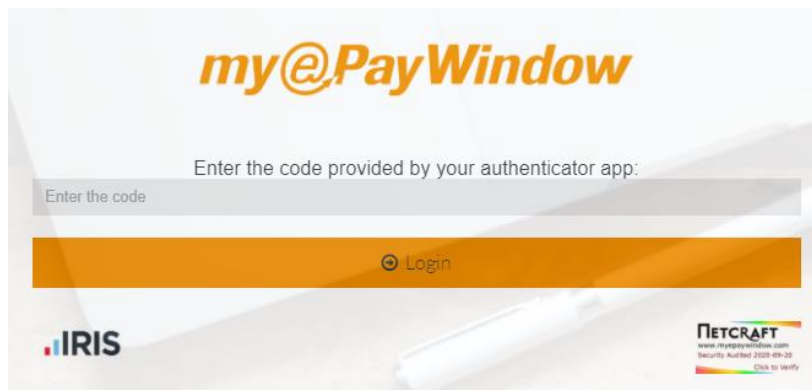
Enter the username and Password to confirm the action.

Enter the code from the 'authenticator app' to confirm the action

Employer connection and Employer user setup

Once the Payroll department and payroll department users are set-up to use the Portal, an Employer and Employer users can then be set up for access too.

Like the payroll department set-up, this is a 3-step process:

1. Connect an Employer to the Portal from Payroll Professional from an open Payroll data file.
2. Connect and Invite the Employer users to register from myePayWindow (the Employer will then need register via the Portal (verify identity, accept terms and create a Portal user account)
3. Verify Employer user connection – the payroll department users can check the Employer user status in the Portal.

Once these steps have been completed, payslips and documents can be delivered to the Employer and the employer will be able to send documents to the payroll department. More specifically, a payroll department user will be able to send the following to the employer from Payroll Professional;

- Payslips
- CIS Statements
- P60s
- P45s
- Single reports
- Group reports
- Macros
- AE letters
- Other XLSX,DOCX,PDF,XML,CSV,TXT, ZIP,PRCX files

Refer to the sections on 'Sending Payroll data and documents' to the Portal for more details.

Employer connection to the Portal in Payroll Professional

The first step in setting up an Employer is to connect the Employer Company and data to the Portal from Payroll Professional. Go to the Admin or Data tab and choose Employer from the tab, this opens the Employer screen. Check all details are correct, mandatory fields are;

- Name
- Address Line 1

Tax district
The Employer must have at least one employee set up in the payroll before connecting. If this is not the case, an on-screen message will confirm that connection is not possible.

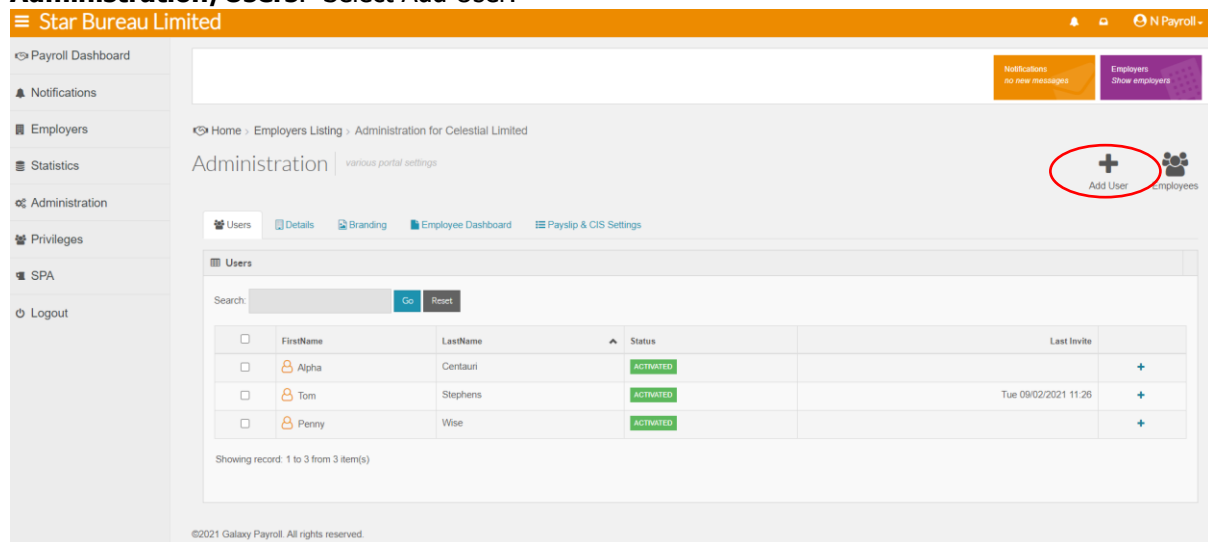Click on **Connect with myePayWindow**

An on-screen message box will display to request confirmation that the payroll department has the consent of the Employer to send their Employees data to myePayWindow. Click 'OK' to confirm consent and send Company and Employee data to the portal or 'Cancel' to not send the data and stop Employer 'connection'

When you have confirmed Employer consent, the following message box will confirm that the Employer has been 'connected' to the Portal.
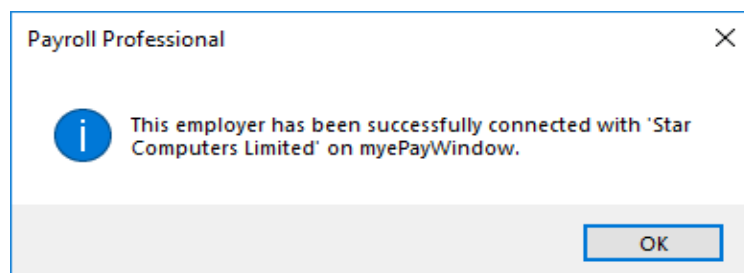
Connect & Invite Employer User(s) from myePayWindow
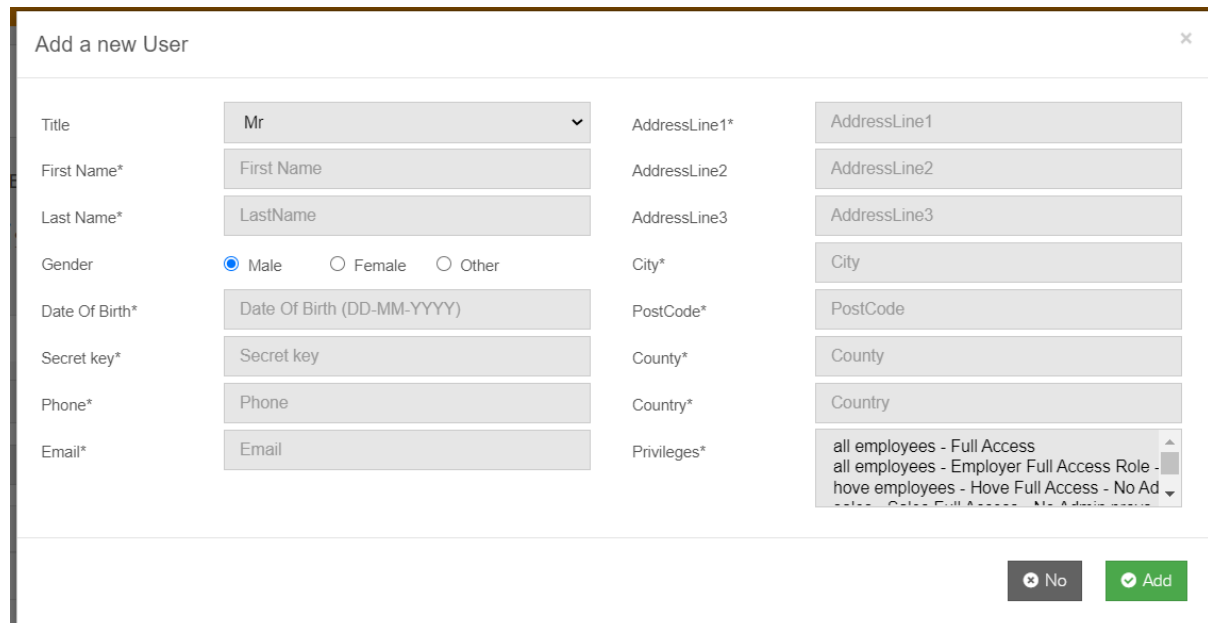
Once an Employer is connected, an Employer User (or users) must be set up. Login to myePayWindow, from the left menu select Employers. Select the **Employer** and select **Administration/Users**. Select Add User.

Complete the information and assign privileges. Click Add.

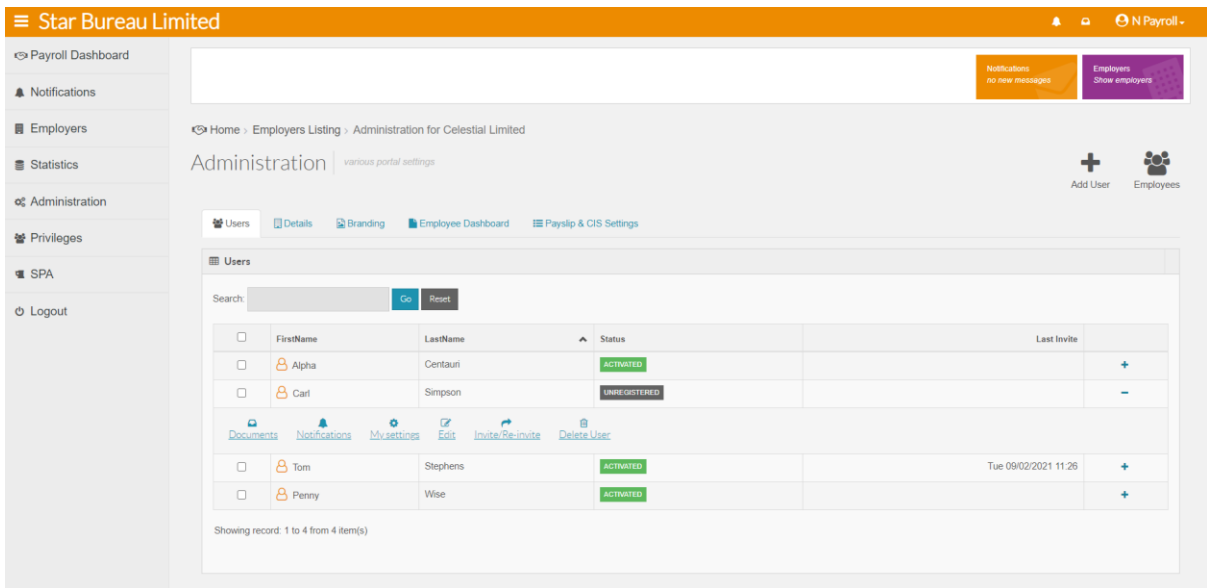Note: You will need to notify the User of the secret key as this will be needed for registration.

Once the user has been set up you can invite them to register on myePaywindow

Note: By default only the first Employer user 'connected' will receive both Payslip-upload and other notifications. Subsequent Employer users added will get notifications excluding Payslips uploads.

An Employer user or a payroll department user can change the default user for the Payslip-upload notifications via the Portal by using the Employer **Administration-details** page.

The Employer user will now be able to complete Registration on the Portal (this is the same process as per the payroll department user; so Verification (with agreed secret word), Consent confirmation and Account set-up – see 'Payroll department User Registration via the Portal' section).

Verify Employer User connection

You can login to the Portal and see the Employer users' status via the **Employers** page. Under the company name click on Administration to view the Employer Users.

This view will show the current status for each Employer User for all Employers that you have connected to the Portal.
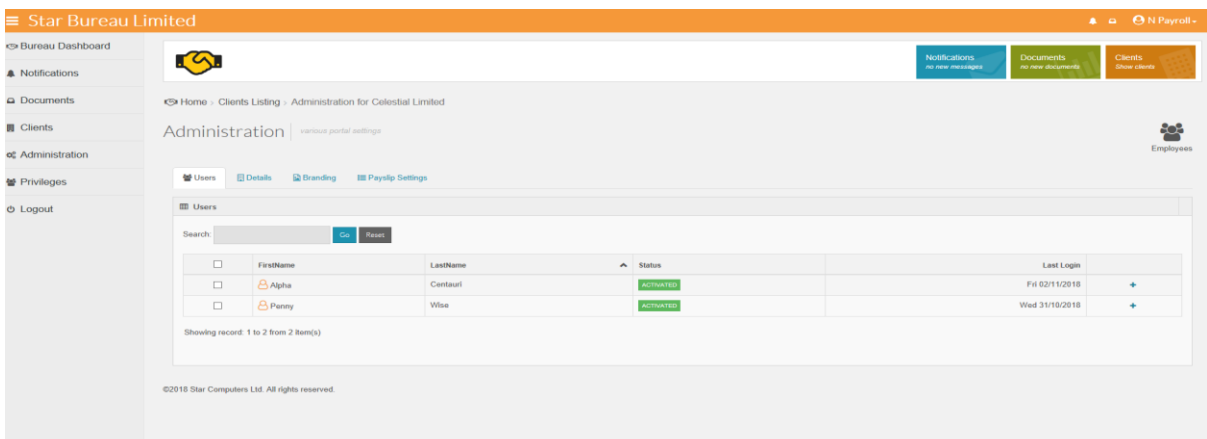
Enforce 2SA for Employer users

2 Step Authentication provides additional security for your users and can be enforced for compliance with company policies and Procedures. When 2 Step is enforced as below all Employer, Employee and CIS users will be asked to create a memorable word between 6 & 12 characters in length when they next logon to myePayWindow. Once the memorable word is set up a user will be prompted to select 2 random characters from the memorable word when they log in.

To enforce 2SA for your Employer, Employee & CIS users select the Administration/Details page. On the details tab tick the **Enable 2SA** box and click **Save settings**

When 2SA is enabled a user a user is asked to create a memorable word which can only contain letters and digits and be between 6 and 12 characters in length.

Clicking 'Submit' saves the memorable word to your user account.

A User will see the normal log in screen when they logon to myePayWindow. Complete the username and password and click on **Login**

Once a username & password is entered a second page is displayed where the user can enter two random characters from their memorable word.

A message displayed if incorrect characters are entered.

To reset the memorable word, click on the **Forgot Memorable Word?** link on the login page to start the reset process.
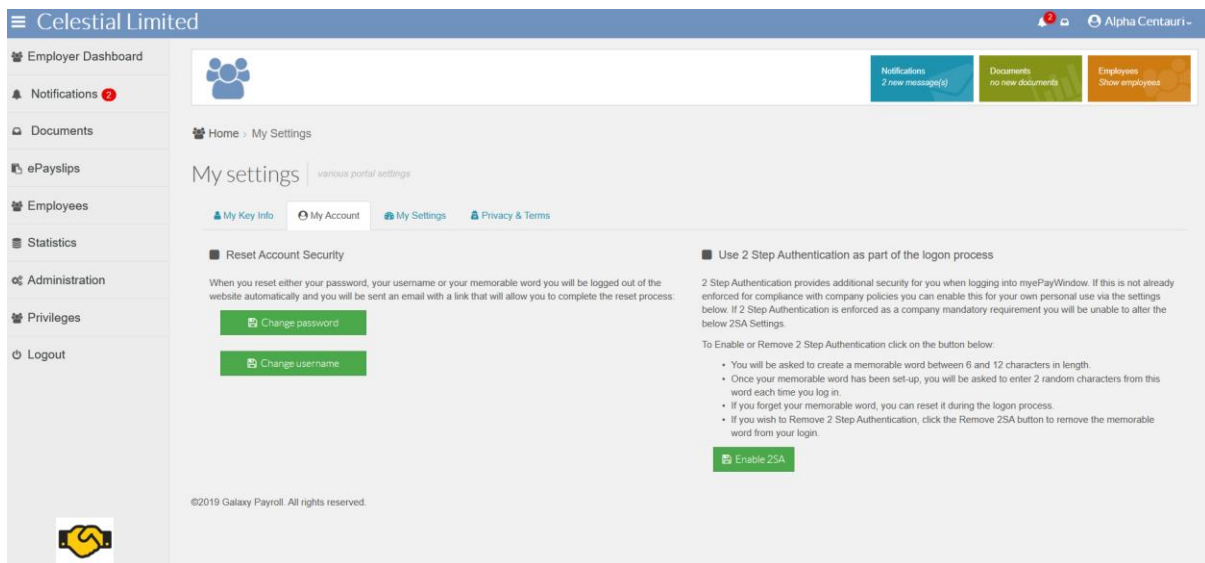

Alternatively, an individual user can enable or remove 2SA on their account provided that 2SA isn't enforced via the Administration page at Employer Level.

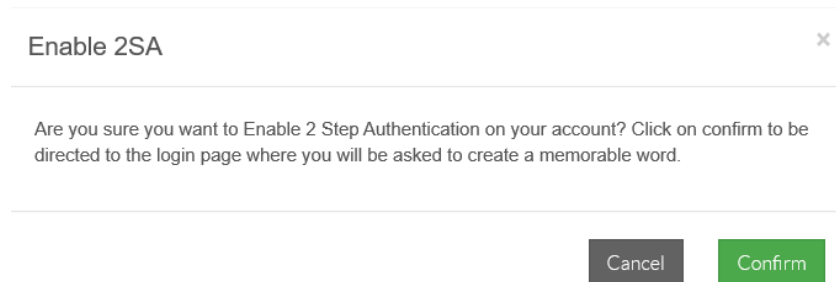From the Top-bar click the user name and My Settings. On the My Account tab.
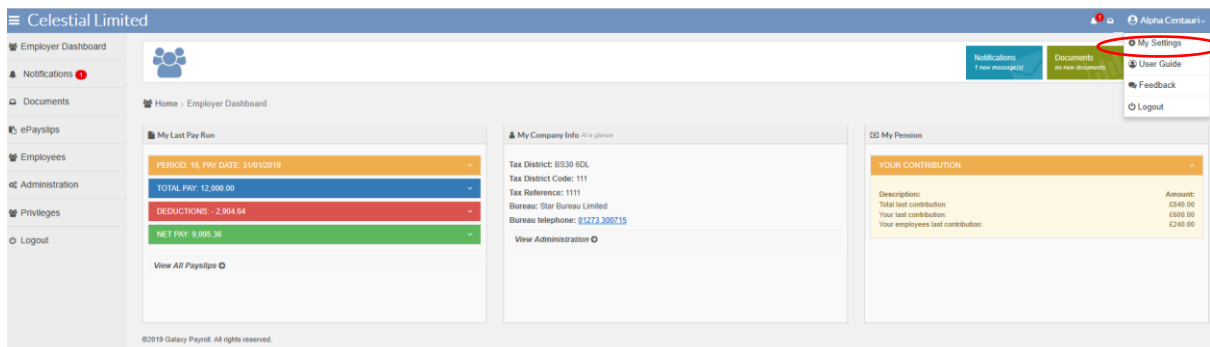
Click the **Enable 2SA** button.

If the Enable/Remove button is greyed out 2 Step Authentication has been enforced and you cannot change this setting.

Click on **Confirm** to set up your memorable word.

Enter the log in details as normal, click on **Login**

After entering their username and password the user can 'Set-up' their memorable word. The memorable word which can only contain letters and digits and be between 6 and 12 characters' length

Once a username & password is entered a second page is displayed where the user can enter two random characters from their memorable word.

A message is displayed if incorrect characters are entered.

To reset the memorable word, click on the **Forgot Memorable Word?** link to start the reset process.

Enforce 2FA for Employer users

2FA can be enforced under Administration for Employer only users or Employer & Employee users.

Once 2FA is selected, the option to select 2FA on Employer Users only will appear. Tick the box to enforce 2FA for Employer users only. Save employer details. If the Employer only box is left un-ticked, then all Employer & Employee users will have 2FA enforced.

■ Enforce additional authentication for Employer & Employee Level Users

2 forms of optional user security authentication can be used in addition to the standard username and password:

- 2 Step authentication 2SA – Requires a user to set-up a memorable word from which they will be required to enter 2 random characters from this word each time they log-in to gain access to their account.
- 2 Factor Authentication 2FA – Requires a smartphone 'Authenticator App' (Google / MS /Authy/andOTP are some examples) Each time a user logs-in they will additionally need to enter a code generated by the authenticator app to gain access to their account.

If additional authentication is not enforced, then 2SA/2FA Authentication can be optionally enabled by individual user via the My Settings/My Account pages.

By default additional authentication is not enabled (None). Use the drop-down selector to choose to enforce either 2SA or 2FA. Then click 'Save' at the foot of the page to apply.

Enable 2FA ⌄
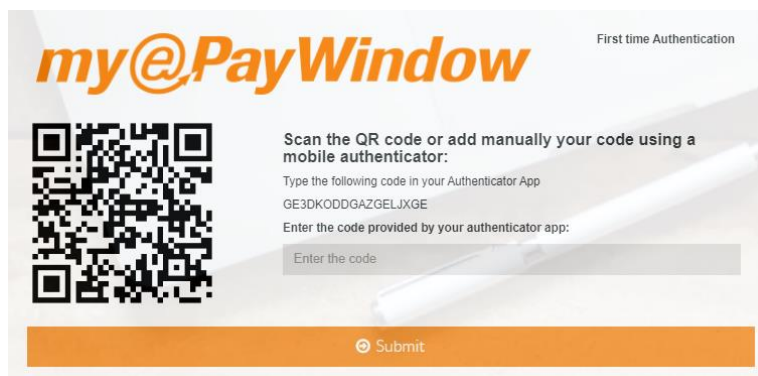
☑ Employer Only

Once 2FA is enforced:

- All Employer & Employee Users (unless you have selected Employer only) will need to download a smartphone authenticator app and when they next log in, scan or copy/paste the QR code to link their account to the app.
- On subsequent login the user will be required to enter a code generated by the app.
- If a User is unable to access their smartphone they can reset 2FA during the logon process. Click on Forgot Authenticator and enter your username to receive an email link to verify your identity and reset 2FA.
- If you only require Employer Users to have 2FA enforced here, tick the Employer only box above. All Employer users will need to scan a QR code when they log in.

🖫 Save Employer details

Once 2FA has been enforced, the user will be prompted to scan a QR code when they next log in.

Ensure you have your "authenticator app" installed on your smartphone.

Scan the code or enter manually to access your account.

Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in "Authenticator". Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account. Enter the code provided and you will access your account.
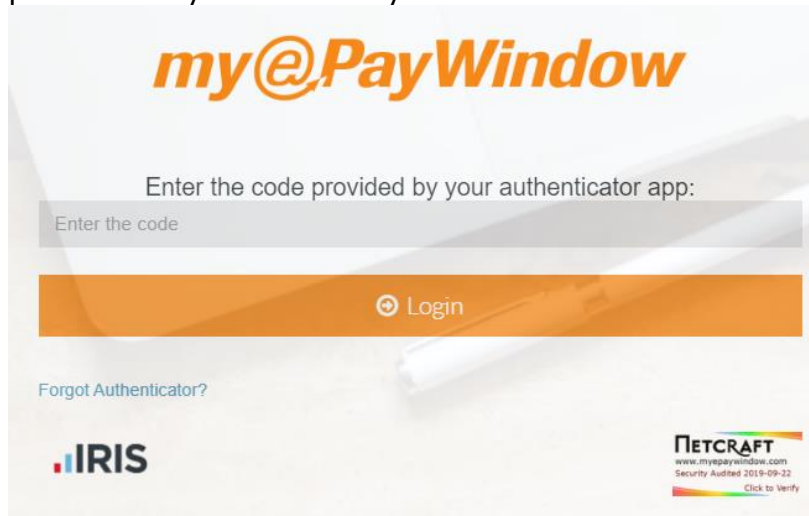

If the account is locked the user will need to wait an hour to re-enter or contact their Payroll Department/Employer to unlock the account.
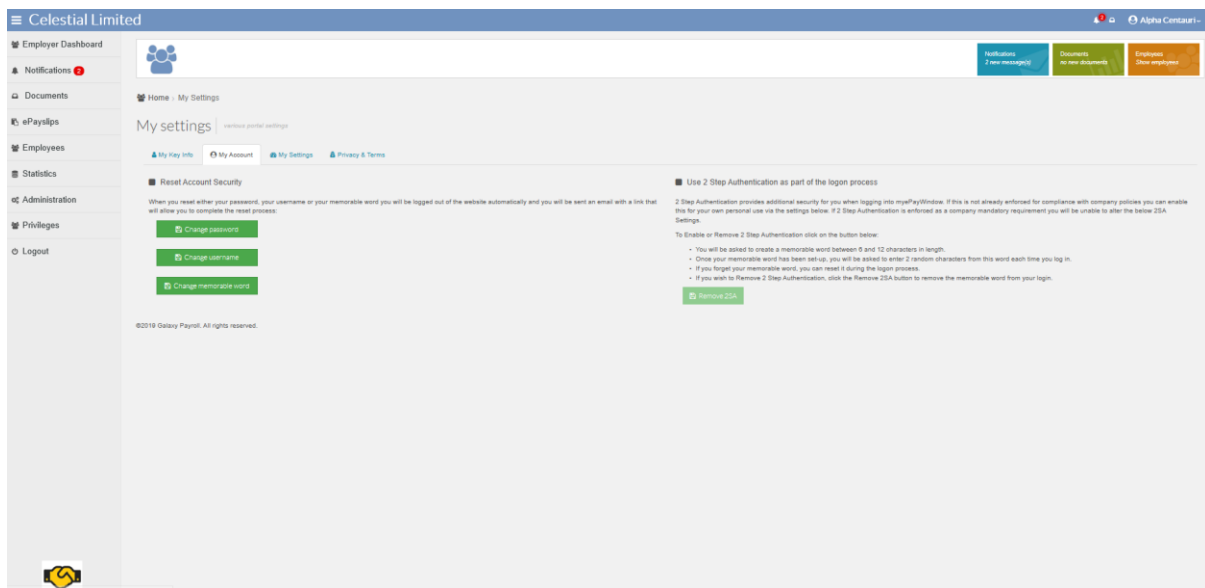
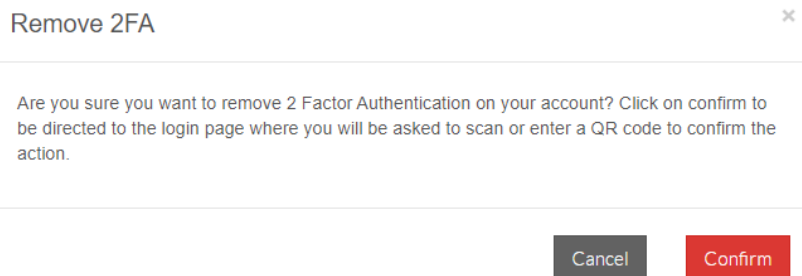## Forgot Authenticator - reset during login
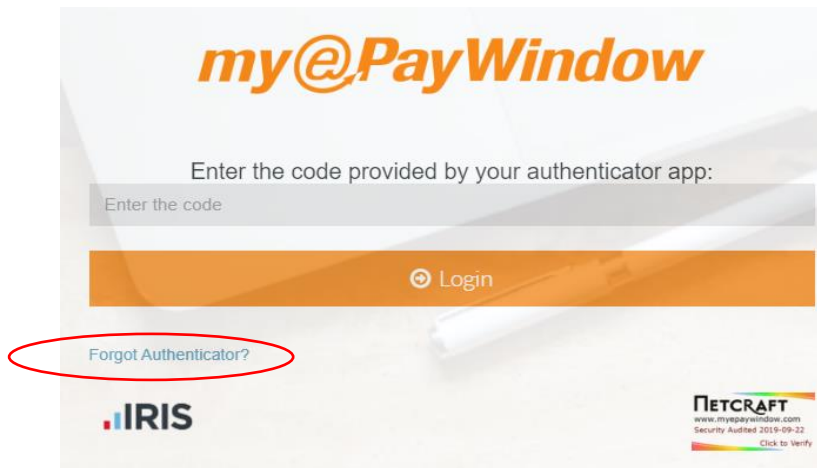
Click on forgot authenticator?

Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the authenticator and gain access to their account
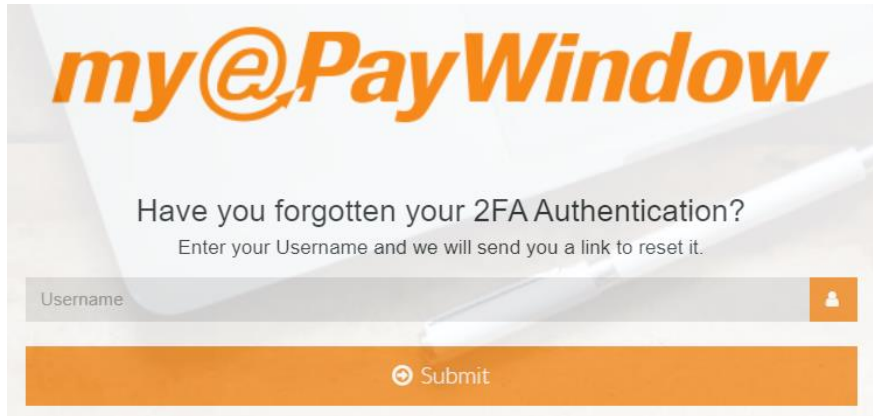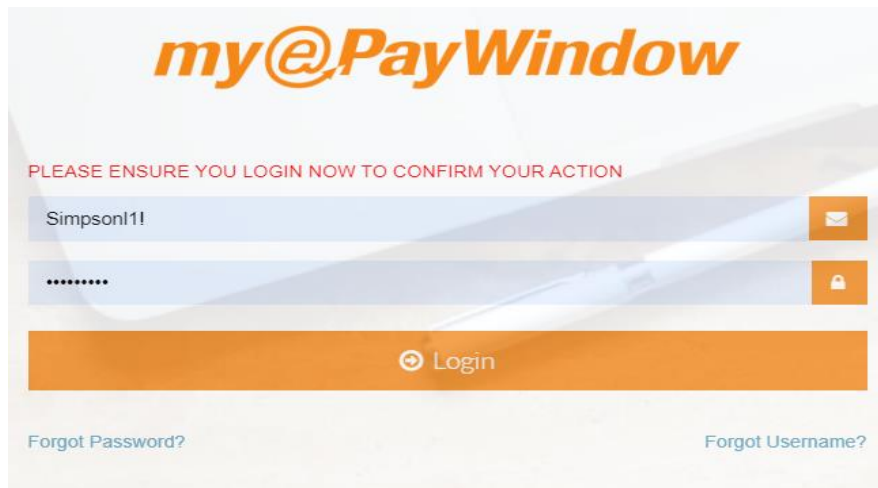
If 2FA is not enforced, a user can Remove 2FA from their account via My Settings/My Account and the Remove 2FA button.

Once a user has confirmed this action, they will be directed to the login page.

Remove 2FA   ✕

Are you sure you want to remove 2 Factor Authentication on your account? Click on confirm to be directed to the login page where you will be asked to scan or enter a QR code to confirm the action.

[Cancel]   [Confirm]

Enter the Username and Password

Enter the code provided from the authenticator app to confirm the removal of 2FA
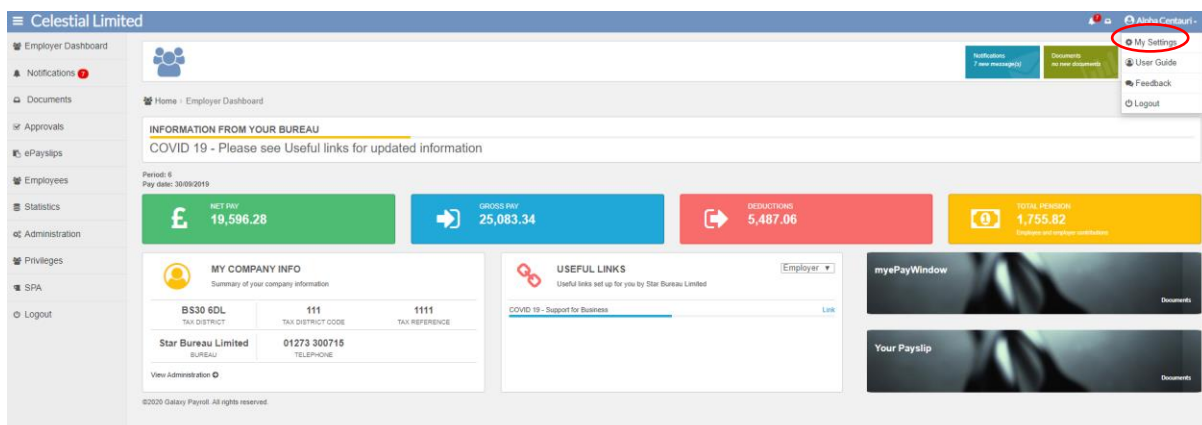
Individual User 2FA Activation

An individual can Enable 2 Factor Authentication for their myePayWindow account provided that 2SA/2FA hasn't been enforced via Administration at Employer/Payroll Department Level.
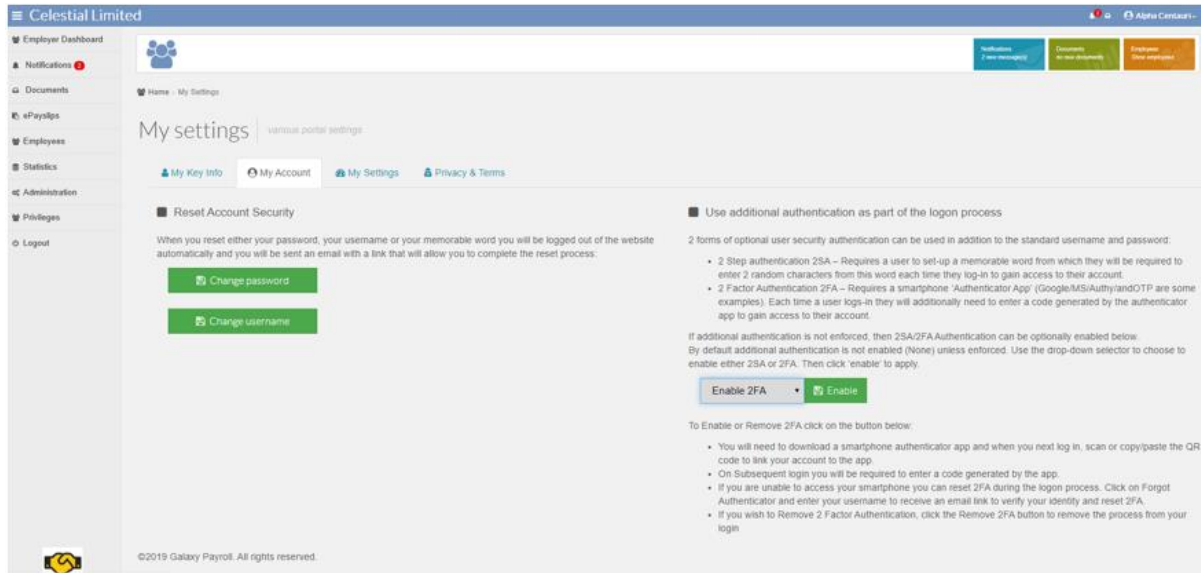
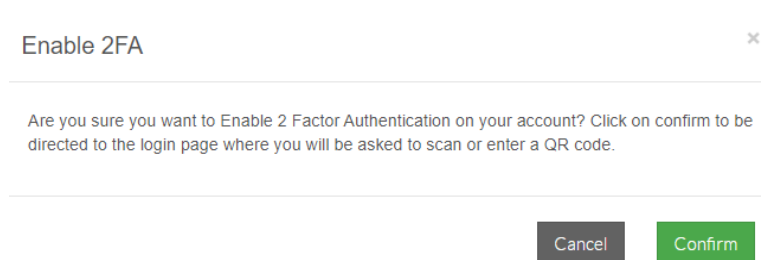From the Top-bar click on the username and My Settings.

On the My Account tab, click the Enable 2SA button.

If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.

Click the enable button to set-up 2FA

Click on confirm

Users will be next asked to enter their username & password, after which they will be asked to scan the QR code or add manually using the authenticator app

Ensure you have your "authenticator app" installed on your smartphone.

Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in "Authenticator". Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account.

Enter the code provided and you will access your account.

Enter the code provided
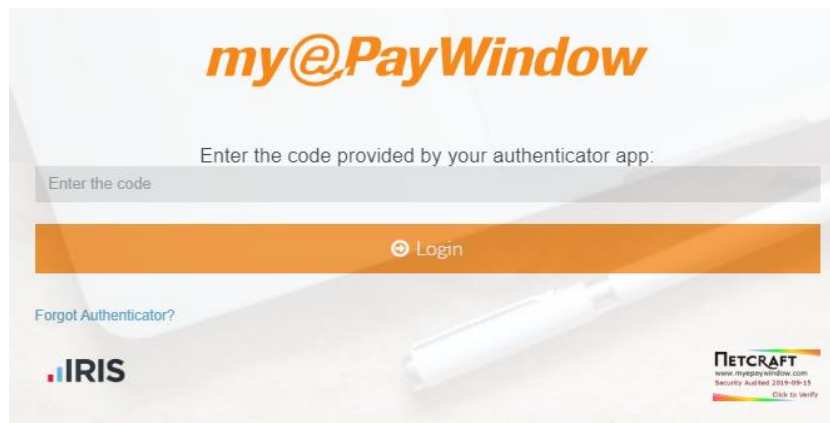
## Restoring Data and myePayWindow

When a Data-file is restored after it has <u>already</u> been connected to the Portal a warning message will appear in Payroll Professional when you 'Connect' the Employer after a restore. The message will ask for your confirmation to identify the employer and reconnect to existing data. Click yes to retrieve the ID if you wish to have access to historical data, click no to create a new Employer ID.
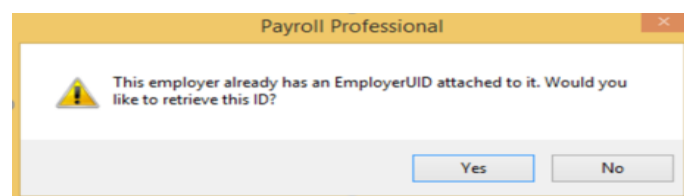

Please note: You may need to re-enter data if you restore e.g. New starter information.   See separate myePayWindow FAQs for further scenarios on restoring.

Setting Employer contacts for Group reporting

Once you have set up Employer users, you can set these as the default recipients for Group reports using the **myePayWindow** tab of Client Report Macro settings section on the **Employer details** screen.
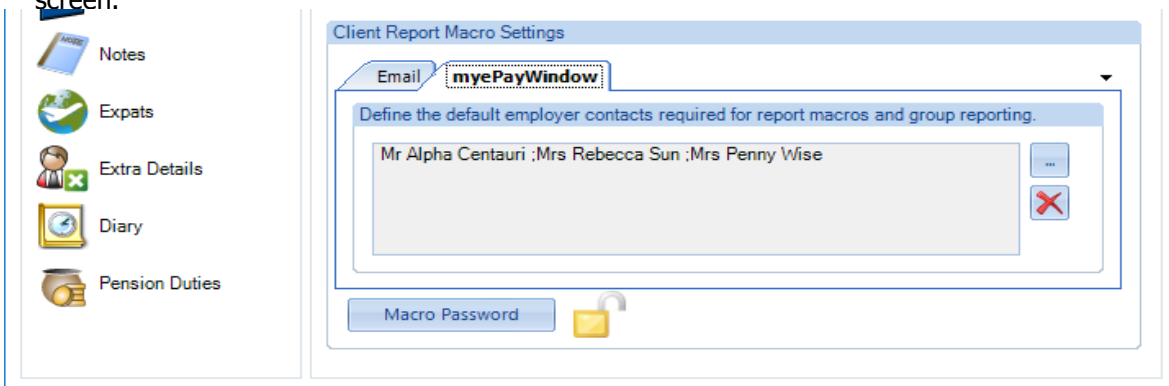
Click on [...] button to choose the Employer contacts:
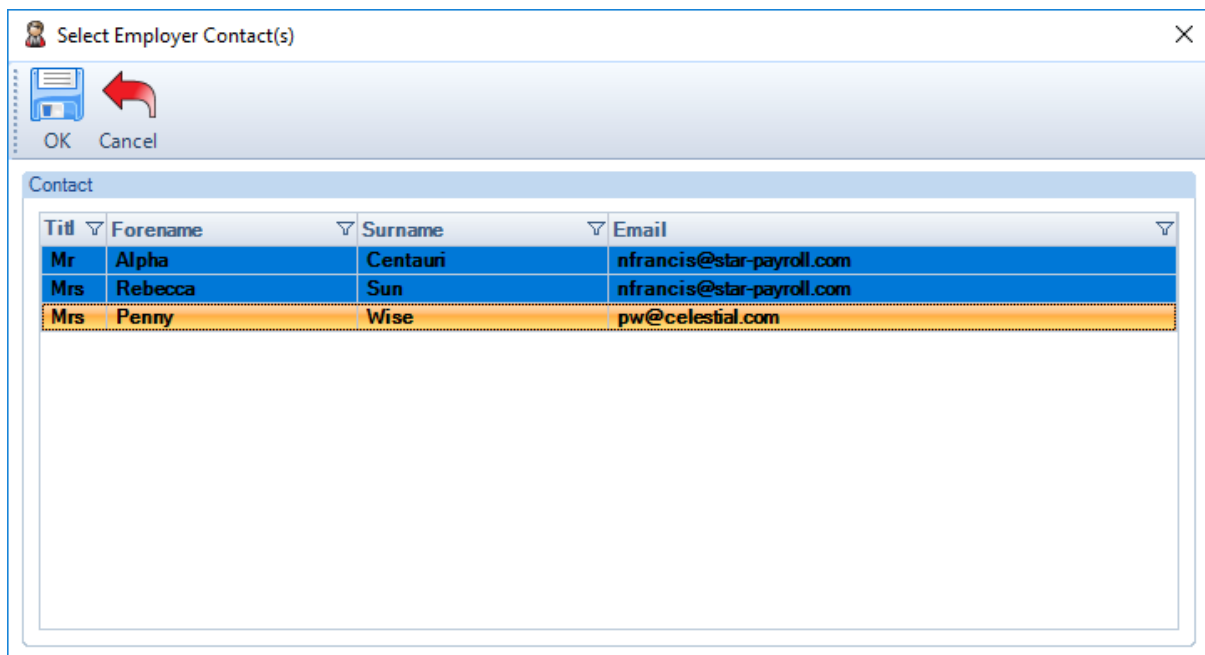
You can select more than one Employer contact by pressing Ctrl-click, click OK to save and exit.
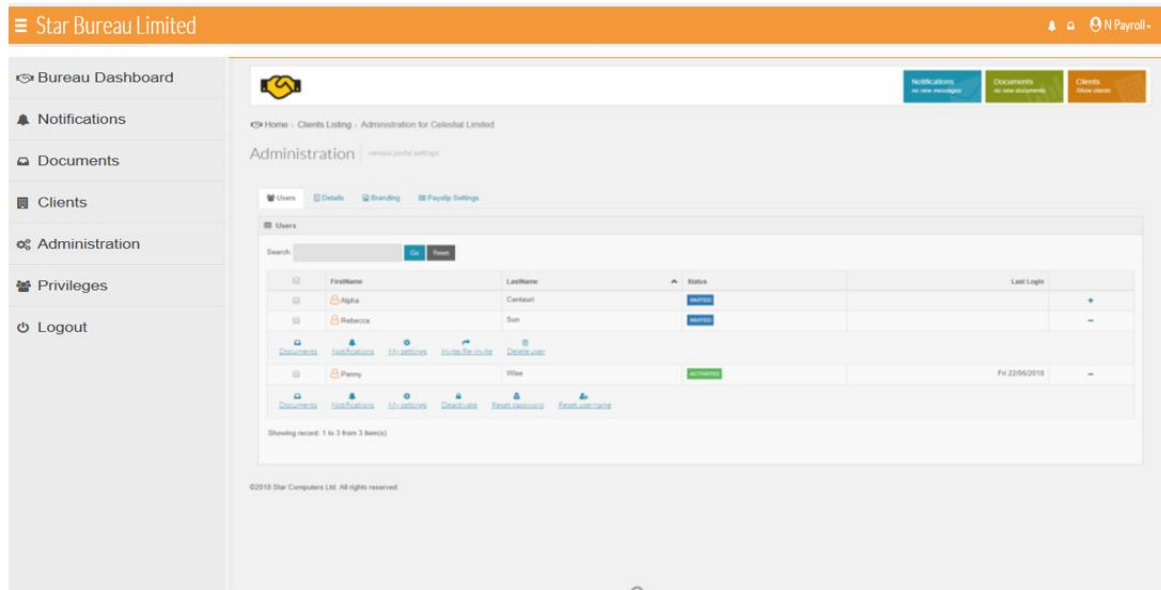
Deleting Employer users

From the Portal

An action to **Delete** an Employer User in the Portal will only be available as follows:

For Payroll department users only via **Employers** / **Employers listing** page, **Administration**

For Employer Users via their Portal **Administration-Users** page

For Payroll department and Employers, a User can only be deleted (the delete action will only be available) when the Employer User Status is either 'Unregistered' or 'Invited'

Notes: When an Invited Employer user is deleted from the Portal, their status will change in Payroll Professional to 'Unregistered'. When the **Employer, myePayWindow User Maintenance** screen is next opened the user can then be deleted in Payroll Professional

Employer User Leavers

If an Employer user leaves the Employer and they have an activated Portal user account, the user cannot be deleted but their Portal account should be deactivated, in **Payroll Professional** go to **Employer, myePayWindow User Maintenance (Edit)** and use the toolbar **Disable** button to deactivate their account.

The Employer User can also be **Deactivated** (only by a Bureau user) via the Portal, see the Portal screenshot above.

Remove Employer

If an Employer leaves you as a client, you will need to instruct us to remove-anonymise the data so that it is no longer visible nor accessible via the Portal. When we do this the Employer and all of the data related to the employer are removed, therefore all employee and payslip data will no longer be visible. To allow Employers and Employees to download data prior to removal there is normally a 3-month notice period for removal. This action cannot be undone so we need you to confirm your instructions in writing to our support desk.

	Name		No Employees	Contact	PhoneNumber	
☐	Celestial Limited	▲	7		01923 246414	+
☐	Remove Emplyer		2		01273111111	+
☐	Star Bureau Ltd		6	Holly Daypay	01273300715	+

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

	Name		No Employees	Contact	PhoneNumber	
☐	Celestial Limited	▲	7		01923 246414	+
☐	na		2		na	+
☐	Star Bureau Ltd		6	Holly Daypay	01273300715	+

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

All data related to the Employer will appear as 'na', all names addresses any personal information will no longer be visible.

Portal Status Definitions

A Portal user's status (Bureau User, Employer User, Employee) shown in Payroll and/or the Portal, will be one of the following;

- Unregistered – user (Bureau User, Employer User, Employee) not yet invited
- Invited – Invitation sent from Payroll Professional no action taken by user yet
- Activating – User has received invitation and is going through registration
- Activated – User has completed registration and is set up
- Deactivated – User account has been Deactivated by Employer or Bureau
- Declined – User has not given Consent, or withdrawn Consent
- Locked – User has five failed login attempts, account locked for one hour. From V9 (U2-2020) the locked status will no longer show in red. You can view if the user is locked by selecting the Reset/Unlock action.
- Privacy Pending – User has not yet agreed to recently updated terms of use/Privacy
- Unknown – unable to connect with Portal to establish status

Employee invitation to the Portal

Once the Employer and Employer users are set up to use the Portal, Employees can then be set up and invited to register.

This is a 3-step process:

1. Check Employee details are complete on Payroll Professional before inviting to the Portal.
2. Invite an Employee to the Portal from Payroll Professional from an open Payroll data file.
3. Verify Employee user connection – check the Employee user status in Payroll Professional

Note: CIS sub-contractors can be invited to the Portal by following the process above.

Check & Update Employee details

At the moment the Employer is 'connected' (see Employer Connection) all their employees are allocated a Portal Member ID, this can be seen in the 'myePayWindow secure transfer' screen, go to **Data**, **myePayWindow**, and then **Users** tab.

In order for Employees to be connected to the Portal their record must include;

- Member ID – this must be populated
- Date of Birth
- National Insurance Number and / or Passport
- address line 1
- Valid Email address – should be for an individual not group email

Note: If a CIS sub-contractor does not have a National Insurance Number and Passport, enter a memorable word in the passport field within Payroll Professional so the sub-contractor can register successfully.

It won't be possible to select an Employee for invitation if the minimum data is incomplete. You can use Payroll Professional's export and import features to update the required details in bulk if required (see the separate documentation on how to do this).

Note: You may have to drag columns and place in position to see all columns together

To populate or update mandatory data. Go to **Data**, **Employees**, select the employee from the listing to update their employee record.

Select the Employee to update then double-click to open the Employee record.
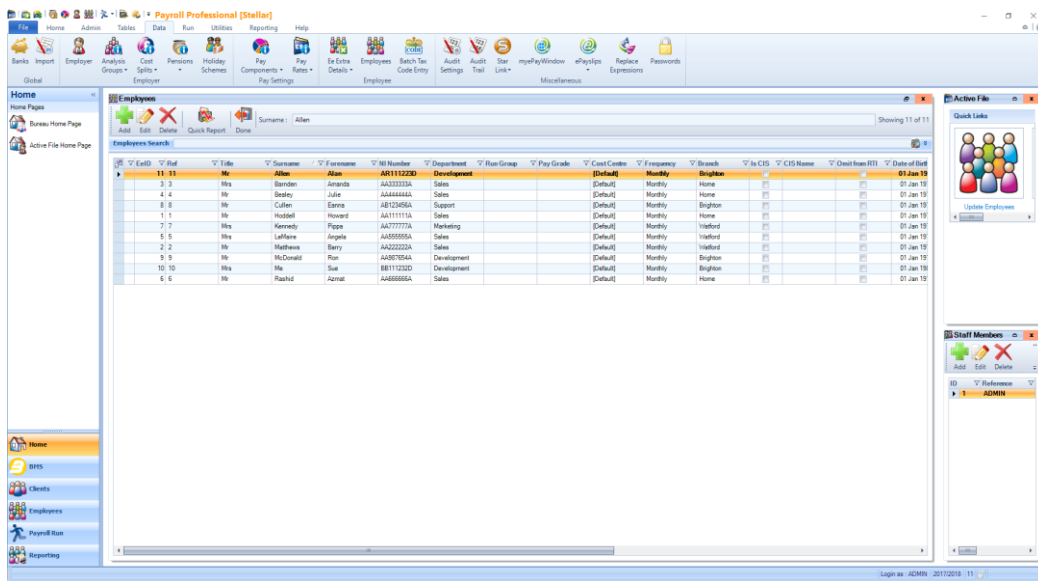
Make the necessary changes, click **OK** to save, the changes must be sent to the Portal before inviting the Employee to the Portal.

Any changes made to the Employees data will be sent to the Portal **Outbox** in the myePayWindow Secure Transfer Screen, this is accessed from the **Data** tab, **myePayWindow**. To send the changes to the Portal Click Select All and then **Send**.
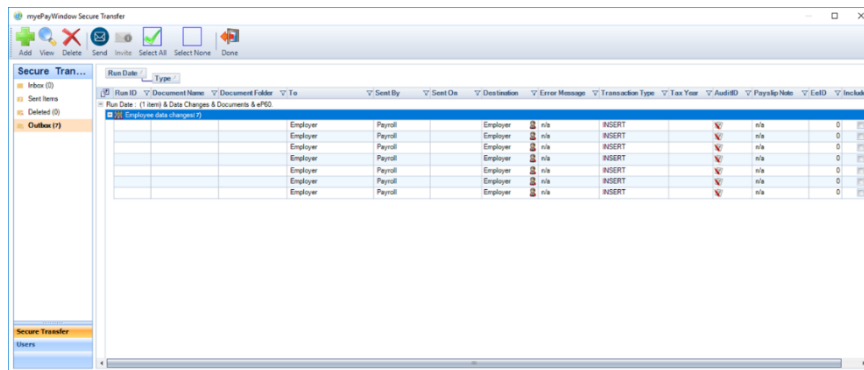
If you try to invite an employee that has had information added to their record, but the changes have not been sent to the Portal you will get the following message:
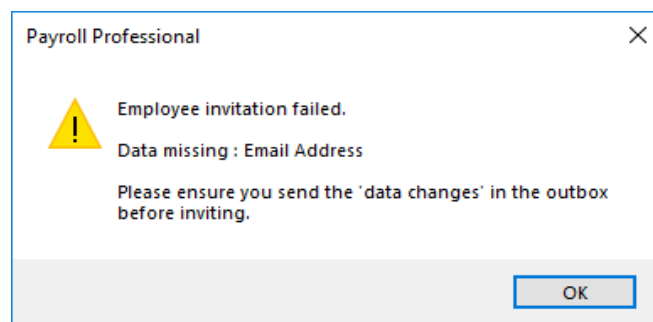
Employees without an NI Number

Employees that do not yet have an NI number, for, example Expats or CIS sub-contractors, can be invited to register on the Portal provided that a Passport number is added to their **Employee details**.

Note: During registration on the Portal, an Employee without an NI Number will be prompted instead to enter their passport number to verify their identity

Invite Employees to the Portal from Payroll Professional

When all relevant data has been entered and mandatory fields are complete, Employees can then be invited. From the secure transfer, Users screen, those employees with complete data will have a tick-box available in the invite column. You can either choose Employees individually by using the tick box or **Select All** and then click **Invite**.

This will send an email invitation to each employee who will then be able to complete Registration on the Portal (the same process as per the bureau and Employer users; so Verification, Consent confirmation and Account set-up).

Invite Employees to the Portal from myePayWindow

Bureau and Employer users are now able to Invite/Re-invite multiple employees. The new functionality will enable users to view missing employee information

As a Bureau user navigate to **Employers/Employees**

Click on Invite/Re-invite action in the top right corner

A pop up will appear which details the employees that are available to be invited, these will include users that are an unregistered or invited (but not activated) on myePayWindow.

On the top right there are two dropdowns. The first one filters the employees by All, can be Invited or Missing information

- **All** – All Employees available for invite

- **Can be invited** – These employees have the required information to be successfully invited

- **Missing information** – These employees require further information to be completed before they can be invited. This will usually be an email address, NI number or Passport number.

To Invite employees, use the boxes on the left to select individuals or tick the top box to select all Click on Invite/Reinvite to invite these employees.

Confirm that you would like to multi-invite these employees

The second dropdown allows you to filter by Current employees, Leavers or CIS.
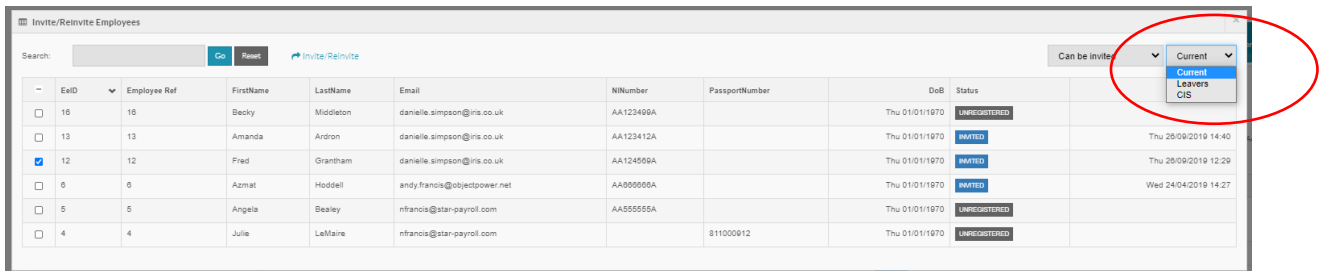
Verify Employee User connection

The status of the Employee will change as the registration process is followed and completed. The status steps are shown below (note these apply to Bureau and Employer users too).
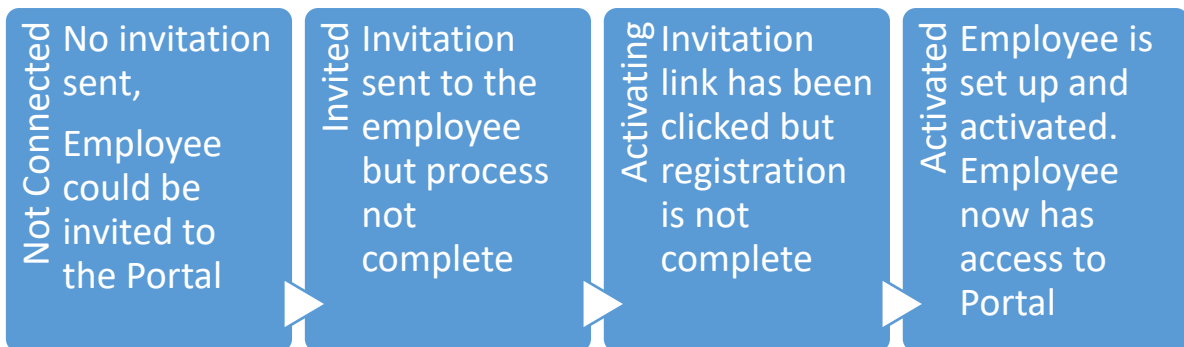
To check the Portal status of Employee users, in Payroll Professional go to the **Data** tab, **myePayWindow**, **Users.** The status column displays the current status of the Employee Users (see section on Portal status definitions for more details).
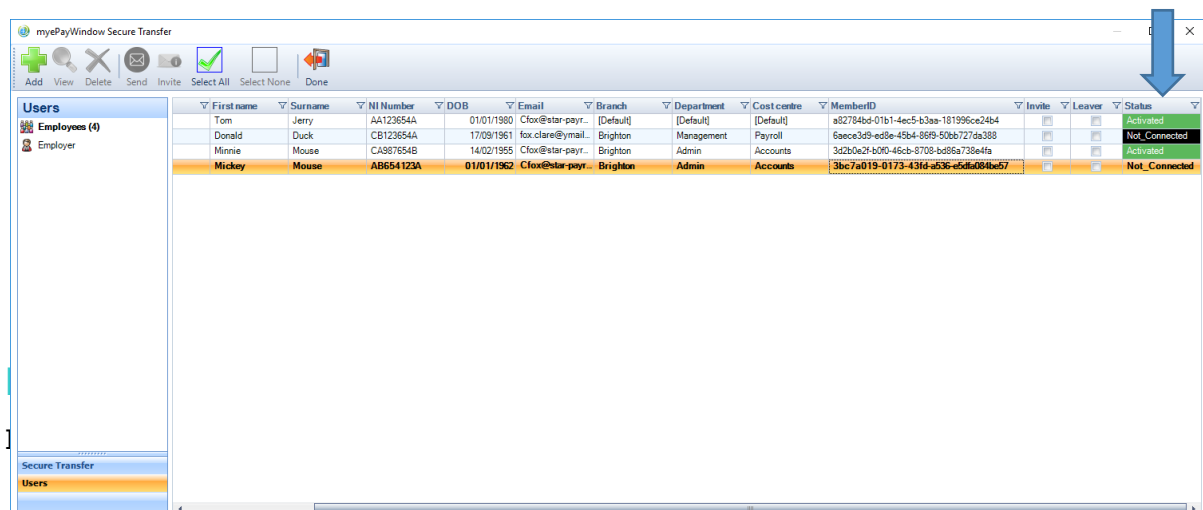
Activated employee user Portal accounts can be deactivated by Bureau or Employer users via the Portal. This can only be done for employees that have completed the registration process and activated their account.

Remove Employees

If an Employee asks to be taken off the Portal, you have to instruct us to remove their data and access to the Portal. The Employee and all of the data related to the employee will be removed-anonymised. Employee aggregated financial values will remain on employer payroll summaries for the current tax year but will not be attributable to any individual. Once removed all data for Employees 'removed' will display with 'na' (See Remove Employer Client section for examples). This action cannot be undone so we need you to confirm your instructions in writing to our support desk.

Employee User Leavers

Employee leaver user accounts are handled as follows on the Portal:

Their account will be disabled automatically 15 months after their leave date (during which time they can access and download payslips and documents as required, this is in line with P11D requirements) 1 months later their Portal data will automatically be anonymised in the Portal

When an Employee leaves an Employer they should be flagged as a 'Leaver' in Payroll Professional. Go to **Data, Employees** button and set the Leaver flag and the leave date (the leave date may have been populated in advance when the Employee gave notice).

Click **OK**, to save. The leaver flag and leave date changes are sent to **Data, myePayWindow Secure Transfer out box** from where they can be sent to the Portal.

Note: The leaver Flag in Payroll means that this Employee should no longer be calculated and the Employee has left employment. The leave date is the planned or actual date of leaving.

On the Portal the Leaver tick-box setting informs the Portal that an Employee should be displayed in the Employers Leavers View as they have now left.

On the Portal the Leave date is used

- To calculate the 15 month period that an Employee's account will remain active and after which it will be deactivated

- To calculate the 1 month period after which the Employee's data will be anonymised

Employees that have been marked as leavers can be seen in the **Secure Transfer, Users** screen and are automatically flagged with a tick in the Leaver column for the Portal once the setting on the Employee Record in Payroll Professional has been set.
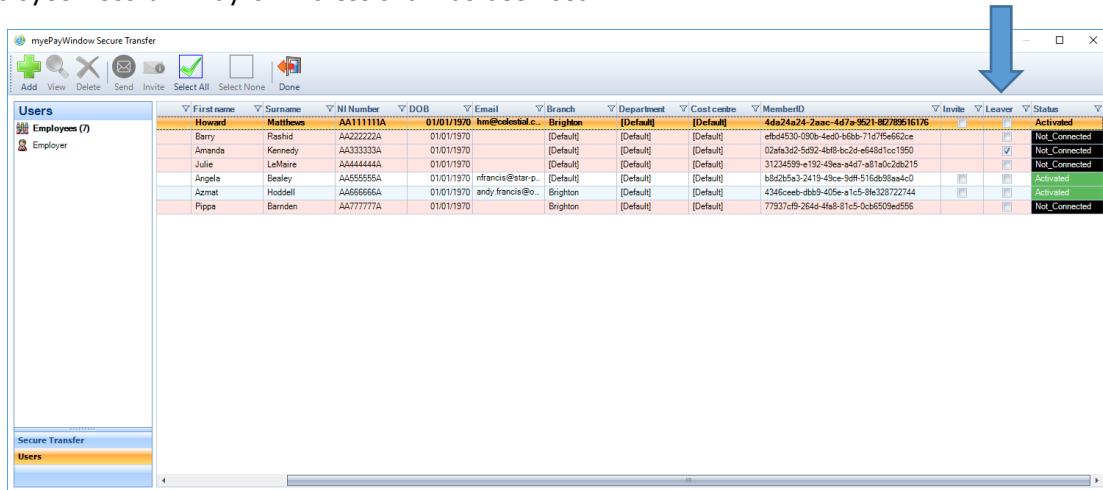
Employee Leavers view on Portal

Employers and Bureau users can see Employees who have left through the **Employees** page for the Employer and using the **Leavers** view selector:
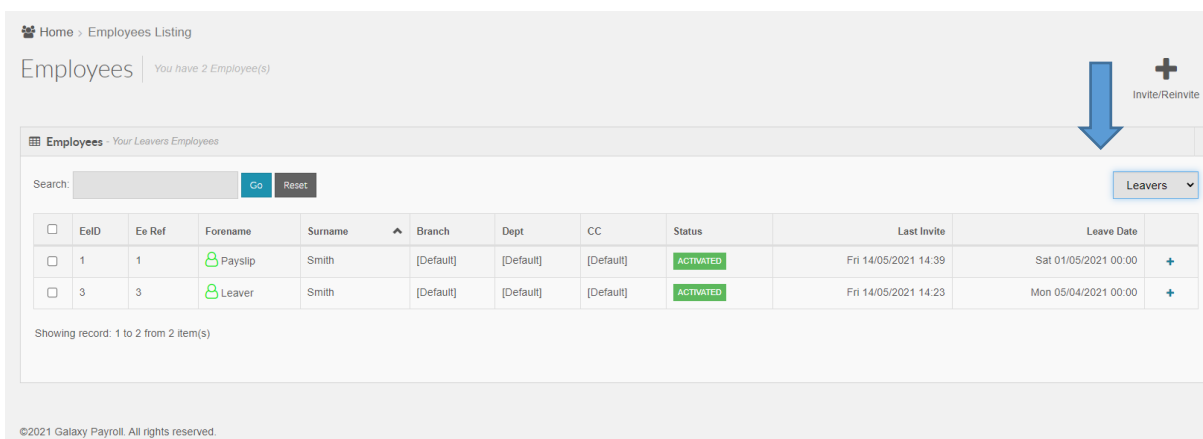
Sending Payroll data & documents via the Portal

A Bureau user can send Payroll data and documents to the Portal to an Employer user account directly from Payroll Professional, this includes;

- Payslips
- CIS Statements
- P60s
- P45s
- P11Ds
- Reports
- Group reports
- Print Macros
- AE letters
- Other XLSX,DOCX,PDF,XML,CSV,TXT, ZIP,PRCX files

Note: Use a zip file to send multiple files at the same time.

When any of the above are sent from Payroll Professional, the Employer user receives a notification in the Portal to confirm that a new document or data has been sent.

Considering data protection regulation (EU-GDPR) this functionality offers a secure way, via HTTPS encryption, to deliver sensitive payroll information to employers.

For Payrolls that are already using ePayslips, historic payslips data will automatically be available to Employer users and Employees through their new Portal accounts without the need to upload data again.

Uploading Payslips/CIS Statements

When a pay run has been completed, payslips/statements will automatically be sent to the **myePayWindow Open run,** Secure Transfer Outbox. If the payroll is not finalised a recalculation will automatically update any payslips already in the secure transfer outbox that have not yet been sent. You may wish to create and send pre-approval reports to employers prior to sending final payslips from the Open Run outbox; to do this, create your reports then use the **Data**, Secure Transfer outbox, (make sure the payslips/statements are not selected) to select and send the reports only.

To send finalised payslips/statements to the Portal, go to **Open run**, **myePayWindow**, secure transfer outbox.
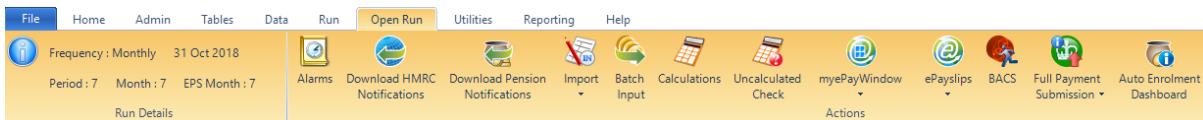
From the **Outbox**, you can 'expand' a date stamped entry to see its details. In the example below you can see ePayslips/CIS Statements (x) where x is the number of payslips/statements to be sent to the Portal.
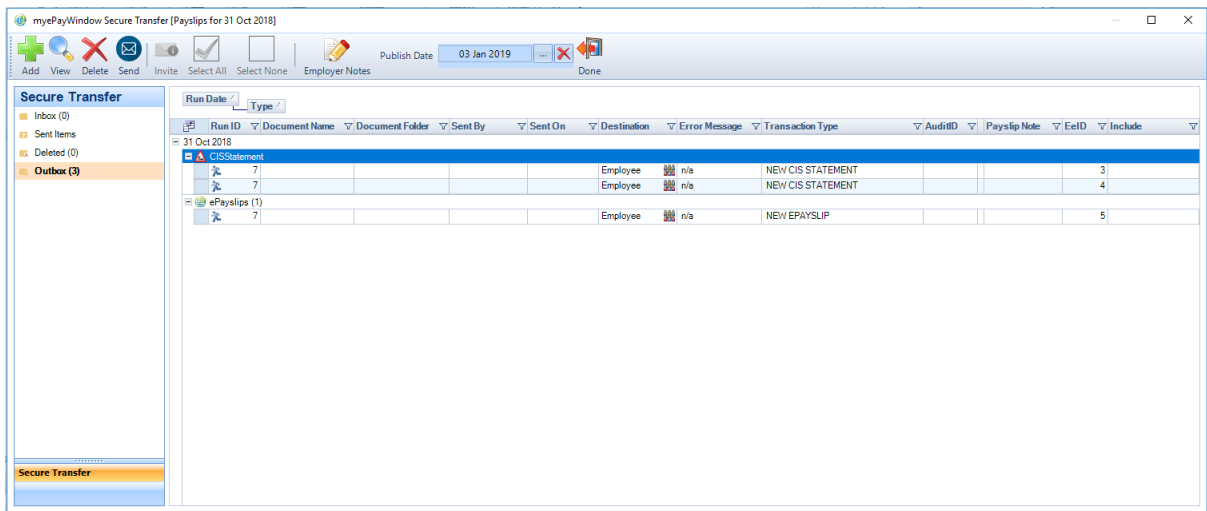
Setting a Payslip Publication date

In order to set the date from which Employees will be able to view their payslips in the Portal, you can use the **Publish Dates** field in the menu bar of the Secure Transfer screen. Employer users will be able to view Payslips as soon as they are sent to the Portal (and will receive a Portal notification that 'Payslips are ready for Publishing'). Employees however, will only get notified and be able to view their payslip once the date set has been reached. At this time Employers will also be notified that Payslips have been published. If the Publish date defaults to today or is set to today the employees will be able to view their payslips immediately and will receive an email notification within an hour.

Please note: If the Publish date is future dated the employee will receive an email notification on the morning of the publish date (around 8am)
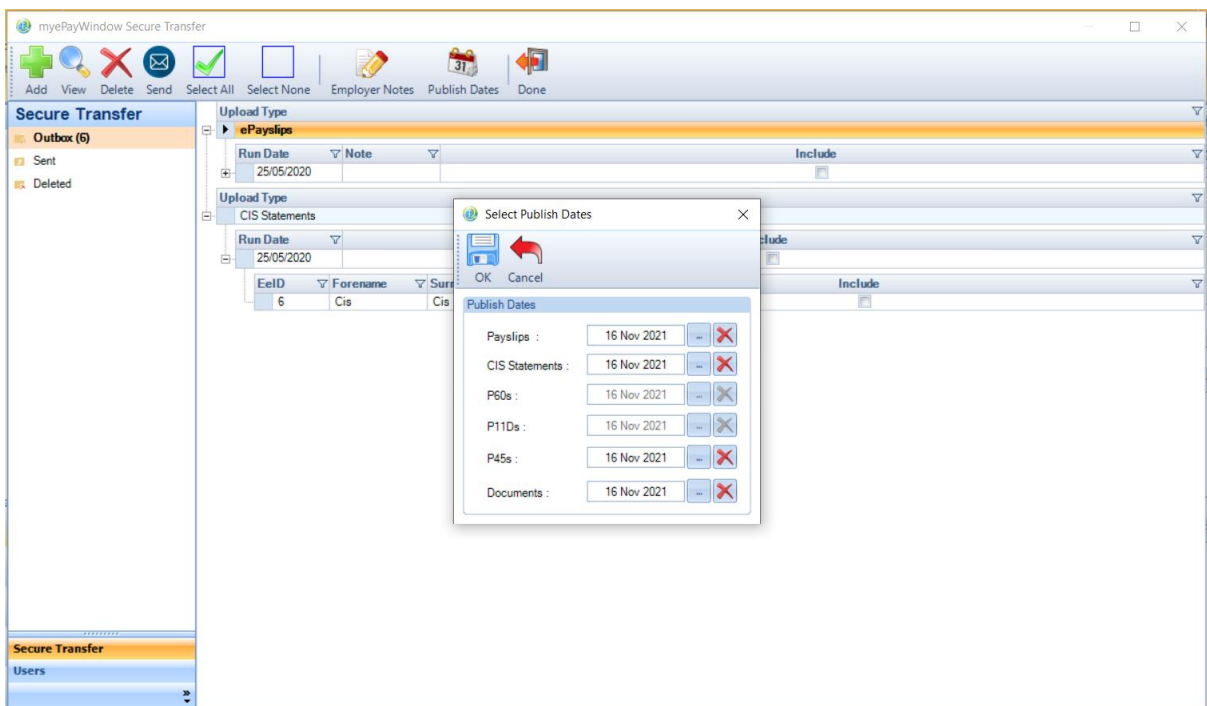
Adding Employer Payslip notes

In order to include an Employer message on all Employee Payslips (this will be displayed at the footer of the online Portal Payslip) use the **Employer Notes** button in the menu bar of the Secure Transfer screen. You can add an Employer note of up to 800 characters. Employer and individual Employee payslip notes can be used simultaneously.
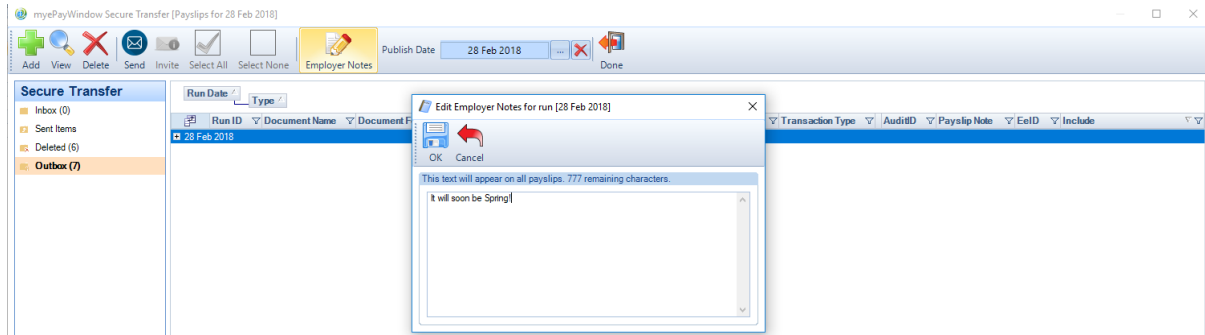
Adding Individual Employee Payslip notes

In order to include a Payslip message for one or more specific Employees (this will be displayed at the footer of the online Portal Payslip) double-click on the expanded **payslips** row for the employee required in the Secure Transfer screen. You can add an Employee note of up to 50 characters. Individual Employee payslip notes and Employer payslip notes can be used simultaneously.
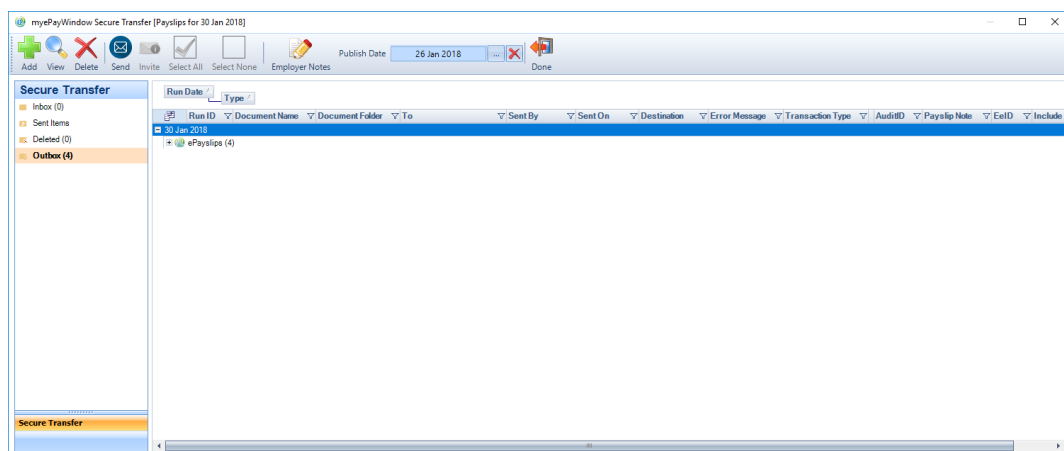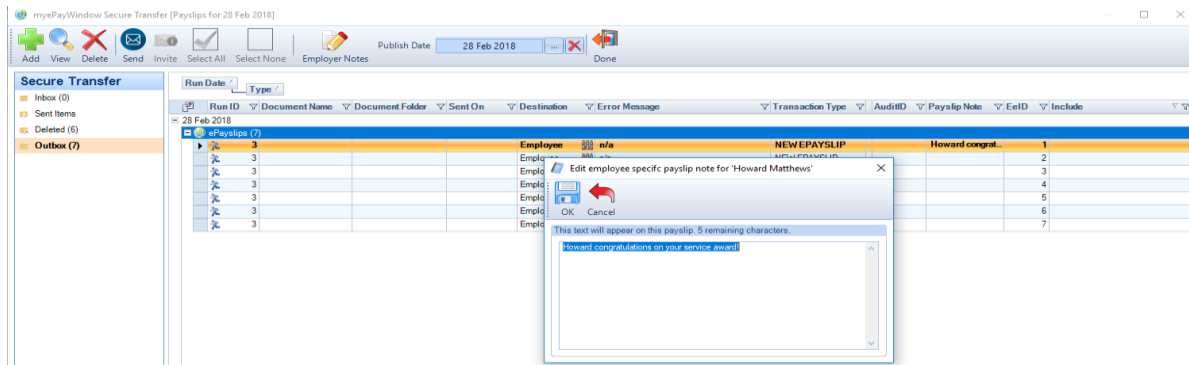
When **Send** is clicked, all payslips/statements will upload including those for employees/sub-contractors who have not yet been invited to access the Portal. This gives the Employer a full view of

all employees/subcontractors in a pay period irrespective of whether the Employees are using the Portal for self-service.

Paper Payslips/CIS Statements

Additional paper payslip reports/ CIS Statements (prefix myePay) have been created in Payroll Professional so that in addition to the ePayslip setting, any employees/sub-contractors will be included who have not been invited to or are not already using myePayWindow allowing a paper payslip/statement to be created for them.

Note: If you Invite/re-invite users directly from myePayWindow remember to refresh your data in Payroll Professional before running the payslip reports. Data, Employer, Update myePayWindow.

Deleting ePayslips/CIS Statements – Pay run Level

When logged in as a Payroll department User you can delete a pay run.

Choose Client, ePayslips or click on the CIS Statements icon and select the period/run:

Click the 'Delete Payslips' or 'Delete CIS Statement' action and in the warning message; Choose Delete or NO to cancel

Deleting ePayslips/CIS Statements – Employee Level

When logged in as a Payroll department user you can delete individual payslips/statements or all payslips/statements for specific Employees/Sub-Contractors.

Choose Employers, employees, then select an employee/sub-contractor & click on ePayslips/CIS statements: You can select the view on the right hand side to show current, leavers or CIS

Use the 'Delete All Payslips' or 'Delete All CIS Statements' button (top right corner of the payslips listing below) to delete all the payslips/statements in all periods for the selected Employee or to delete a single payslip/statement from a specific period, click on the pay date in the listing then click on the Delete Payslip/statement action; the following confirmation message will appear

Choose 'Delete' or 'No' to cancel,

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Sending Historic Payslips

If you have connected an Employer who has <u>never previously used ePayslips</u> but has been processed on Payroll Professional for prior periods, historic payslips for the last 30 days only will be added to the **Data**, **myePayWindow** Secure Transfer outbox. This limits the possibility of inadvertently sending all from the outbox and uploading years of historic payroll data. If you wish to upload payslips for periods earlier than 30 days previous, click the **Payslips from**: date selector, and choose the 'from date' you want.
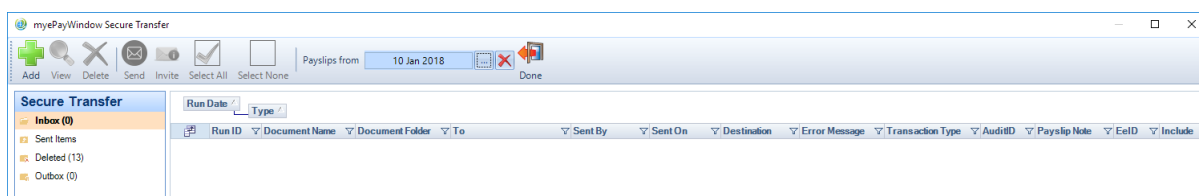
Choose the payslips from the last 30 days to upload or choose an earlier date and you can then optionally **Select All** and **Send.**

Re-Uploading Historical payslips

From the **Data** meu select **myePayWindow**

Select **Re-upload**

Extend the frequency to see the payroll runs available. Highlight the run you would like to re-upload. Select **Ok.**
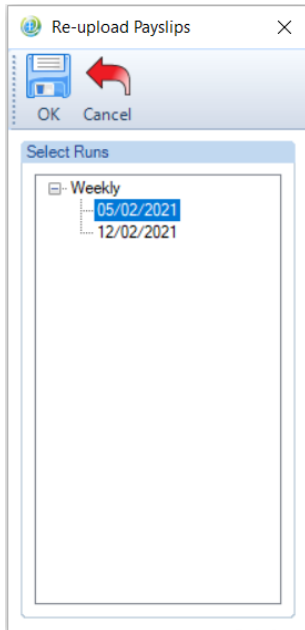
Select the Include box for the employees you would like to re-upload to. Alternatively select all or none. Click on **Send**
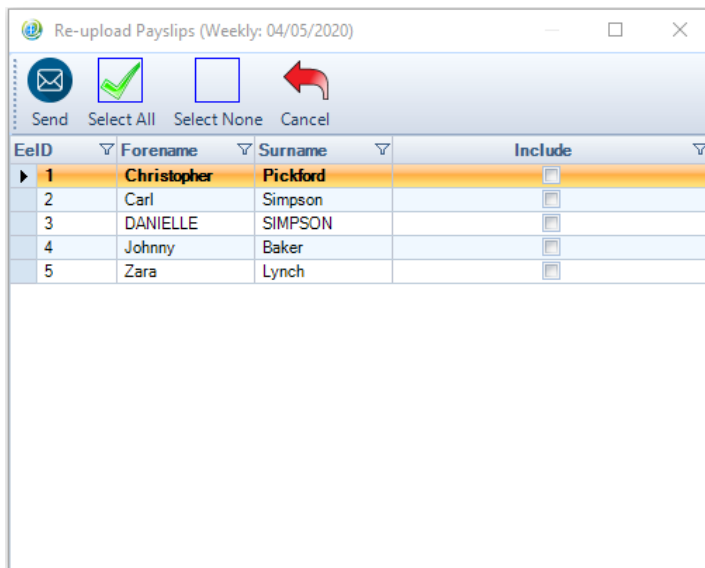
You will receive the following message when the Upload is successful. The Payslips will now show on myePayWindow.
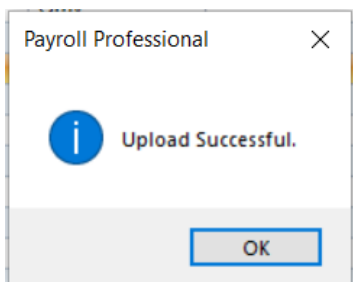
Uploading P45s

P45s are now available to upload to myePayWindow for leavers.

The leaver tick box and leave date need to be entered within Payroll Professional along with a successful Full payment submission.

To send P45s to the Portal, go to **Open run**, **myePayWindow**, secure transfer outbox.

From the **Outbox**, you can 'expand' a date stamped entry to see its details. In the example below you can see eP45 (x) where x is the number of P45s to be sent to the Portal.
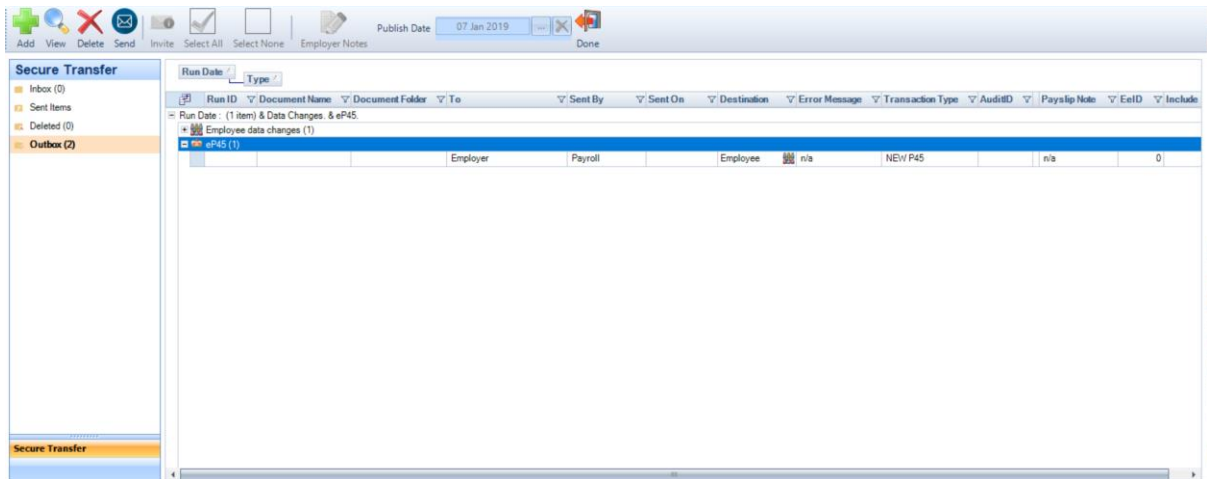
P45 View in myePayWindow

Select your Client, ePayslips and click on the P45s icon.
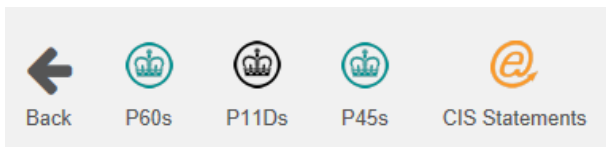
A list of P45s available will show on the next screen, from here you can view, download to PDF or delete P45s
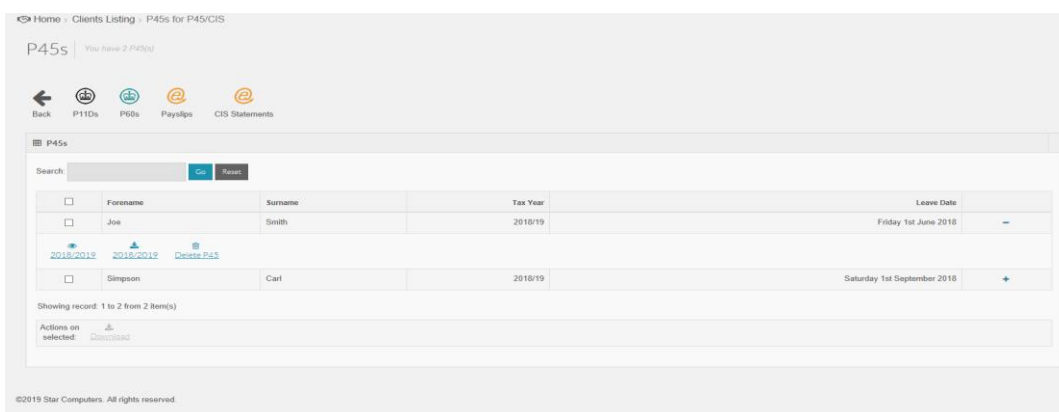
Deleting P45s

To Delete a P45 for an individual employee click on Employers, Select the Employer you require. Click on the ePayslips icon, select P45s and select the employee or leave date. Click on the Delete P45 icon.

click the **Delete P45 action**, a warning message will display. Choose **Delete** or **No** to cancel.

Uploading P60s

Once a pay run has been completed, P60s can be created and sent to the **myePayWindow,** Secure Transfer Outbox. The P60 report (HMRC Approved P60 YY/YY) is used in payroll professional to automatically generate multiple P60s for employees and add them to the Secure Transfer outbox and from where they can be sent at the appropriate time.

Note: P60's should be run at the appropriate time of distribution e.g. At year end to ensure that any leavers that left during the year are removed from the P60 upload. You are unable to delete P60s from the secure transfer box once uploaded.

You are able to export the P60 report as a document and upload to the portal.

Generate P60s

From the Reporting tab choose Run General Reports, Year-end report type, and select the HMRC Approved P60 YY/YY report.

Note: Other P60 reports can be run via Payroll Professional, but the HMRC Approved P60 format should be used for distribution to Employees via myePayWindow.

Run the report:

When the report is displayed on screen Click 'X" to cancel out of the report preview (The Individual P60s have now been generated and sent to the Secure Transfer Outbox)

To send finalised P60s to the Portal, go to **Data**, **myePayWindow**, secure transfer outbox.

Open the eP60 entry to select the P60s to send or Select all and click send to upload to the Portal
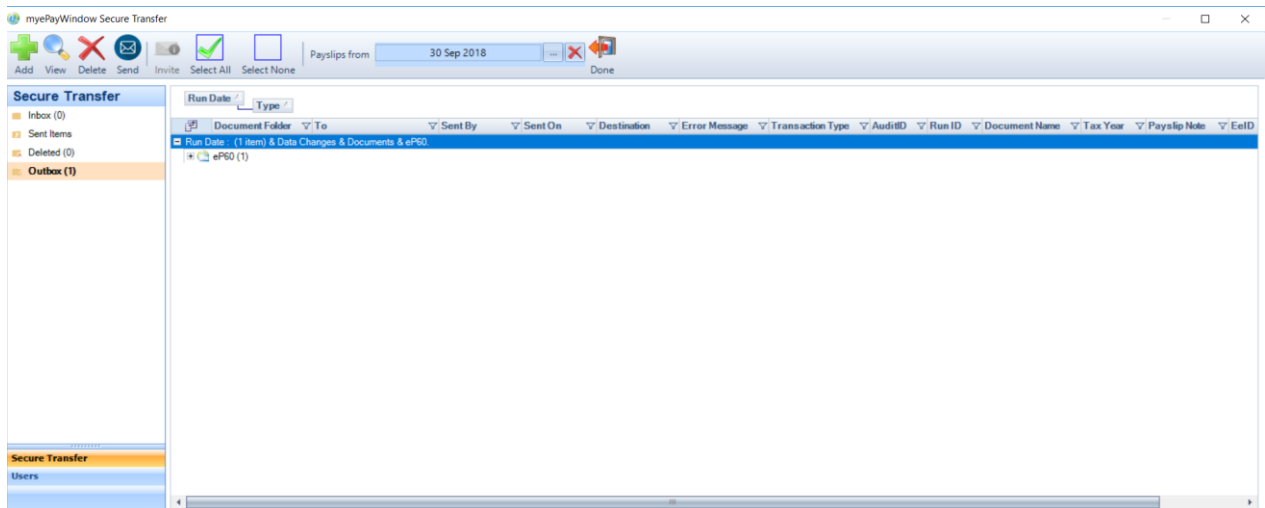
To view the P60s in the Portal, navigate via the Employer listing, ePayslips action then click on the P60s icon, select the tax year:
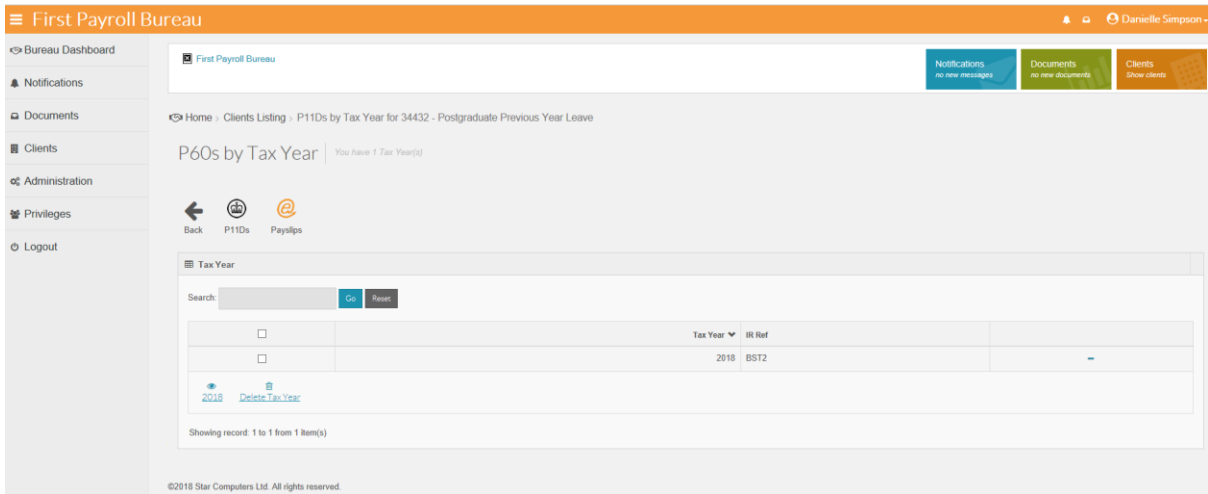
Click on the chosen employee and the view icon.

Online P60 view:

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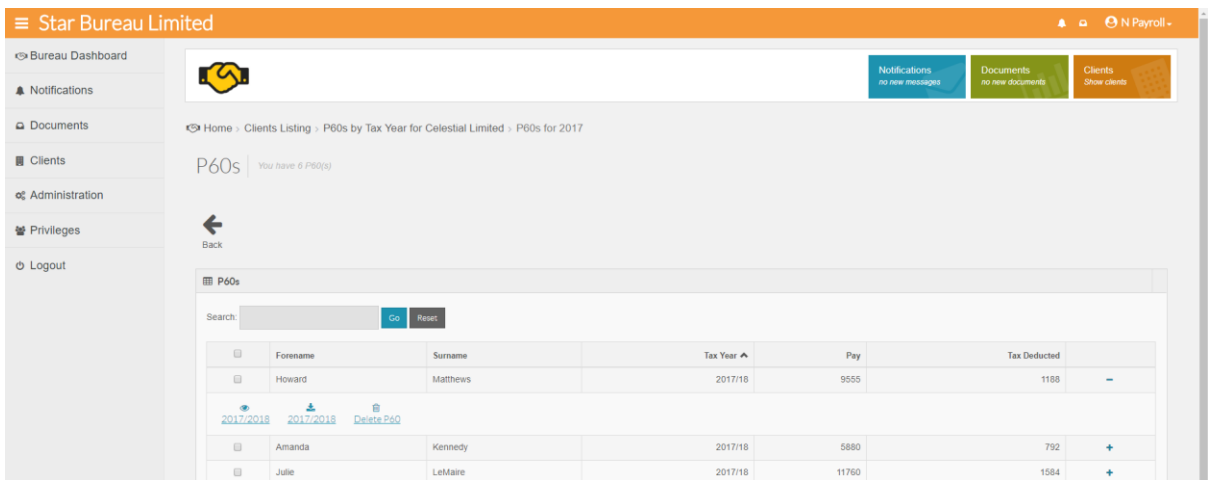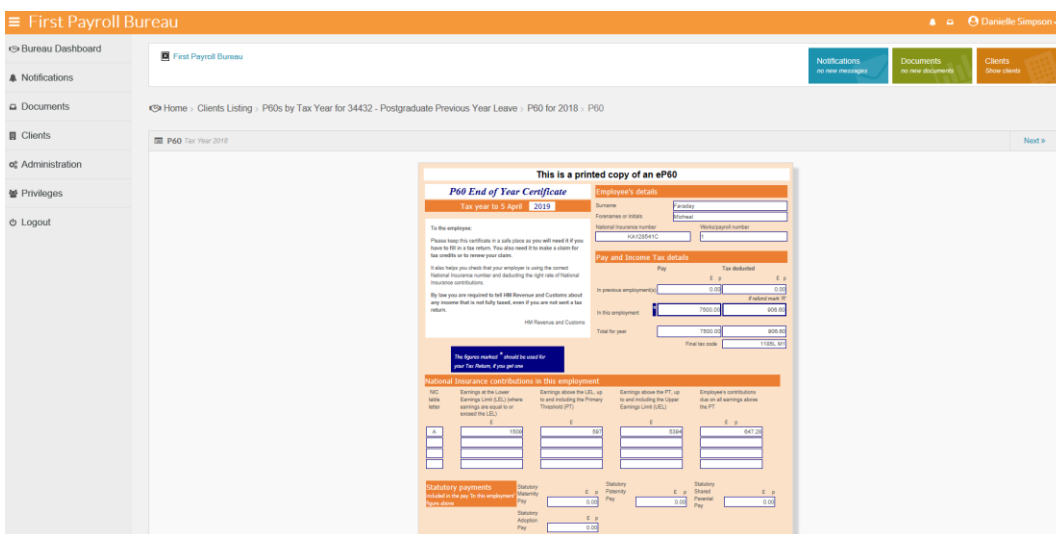
Deleting P60s

Deleting P60s – Complete tax year

Click on Employers, Select the Employer you require, click on the ePayslips icon, select P60s and the tax year.
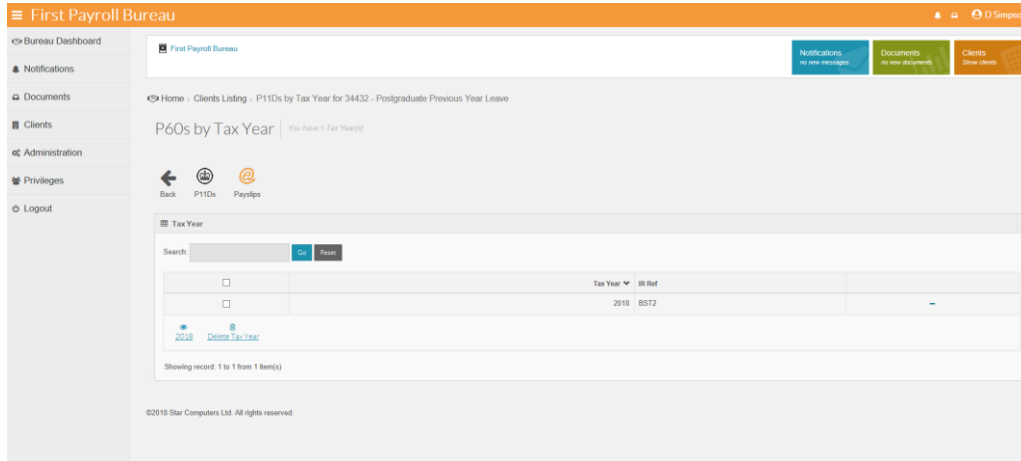
click on the **Delete Tax Year's P60s** action, a warning message will display. Choose **Delete** or **No** to cancel.
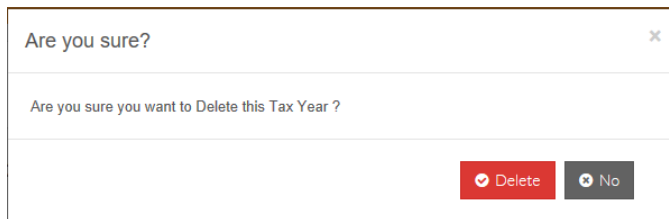

To Delete a P60 for an individual employee click on Employers, Select the Employer you require. Click on the ePayslips icon, select P60s and the tax year. Click on the View icon and select the employee from the listing.

Payroll Professional - myePayWindow user guide – V22 (U1-2022)
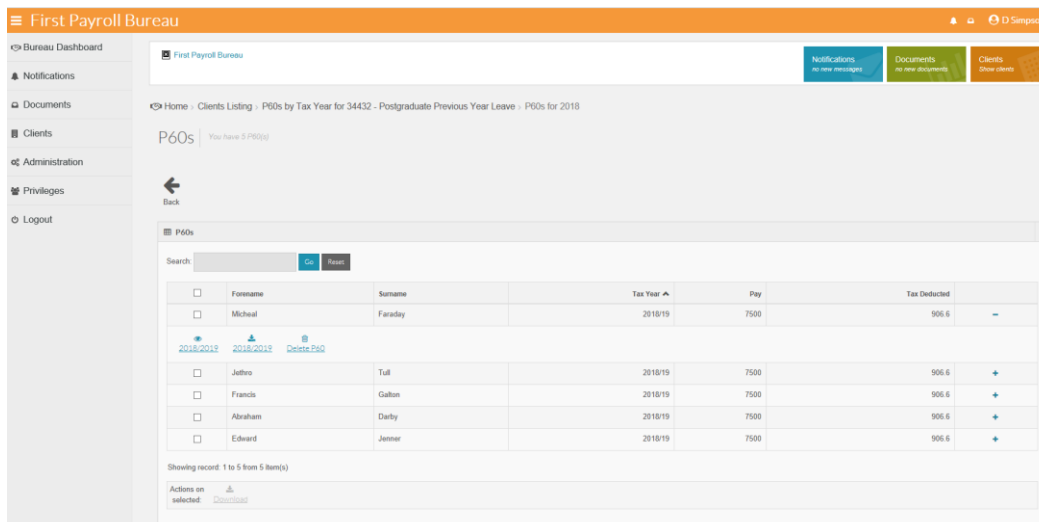
click the **Delete P60 action**, a warning message will display. Choose **Delete** or **No** to cancel.
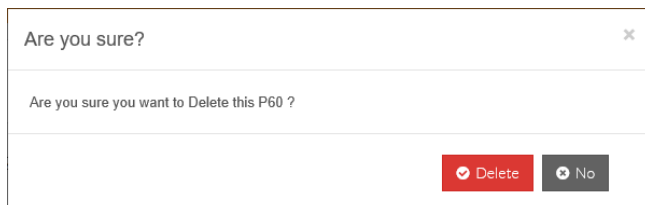
Uploading P11Ds

Payroll Professional has a section for calculating P11Ds (please refer to the help guide for further information)

Once the P11Ds have been calculated they will automatically appear in the outbox
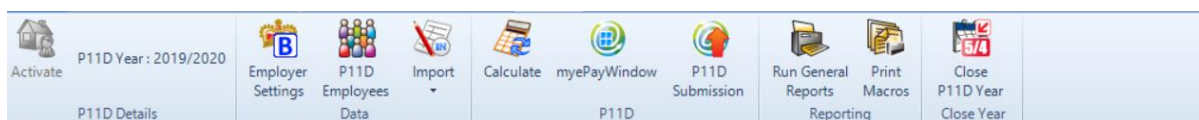
From the **Outbox**, you can 'expand' a date stamped entry to see its details. In the example below you can see P11Ds (x) where x is the number of P11Ds to be sent to the Portal.
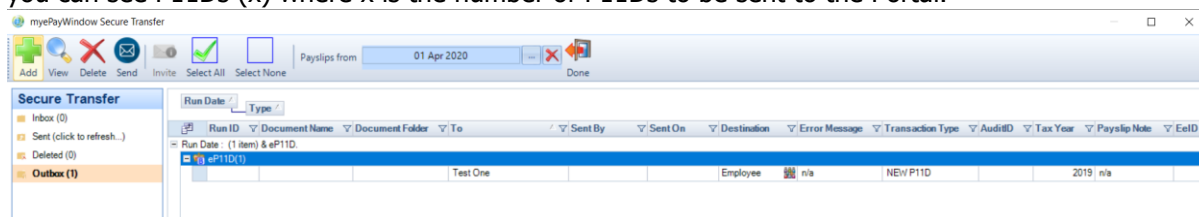
When **Send** is clicked, all P11Ds will upload including those for employees who have not yet been invited to access the Portal. This gives the Employer a full view of all employees in a pay period irrespective of whether the Employees are using the Portal for self-service.

To view the P11Ds in the Portal, navigate via the Employer listing, ePayslips action then click on the P11Ds icon, select the tax year:
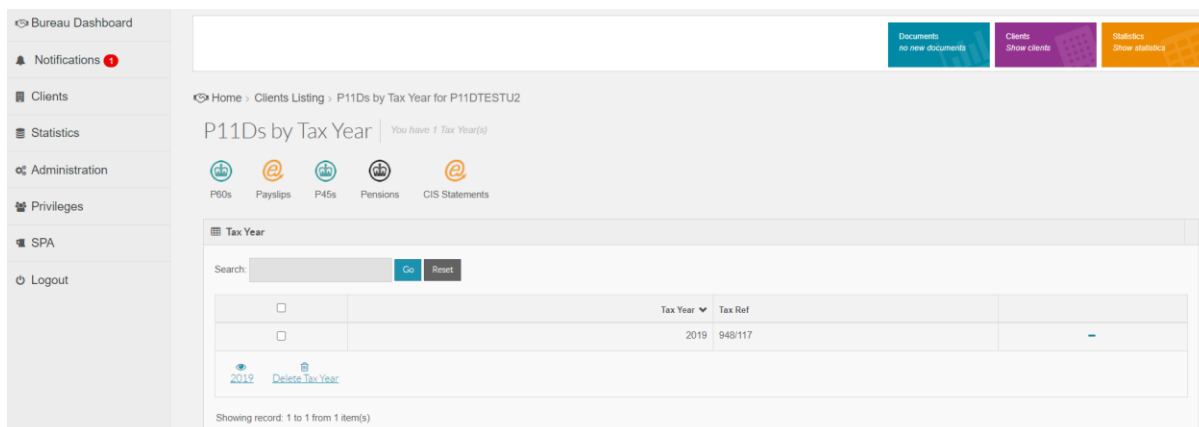
Click on the chosen employee and the view icon.
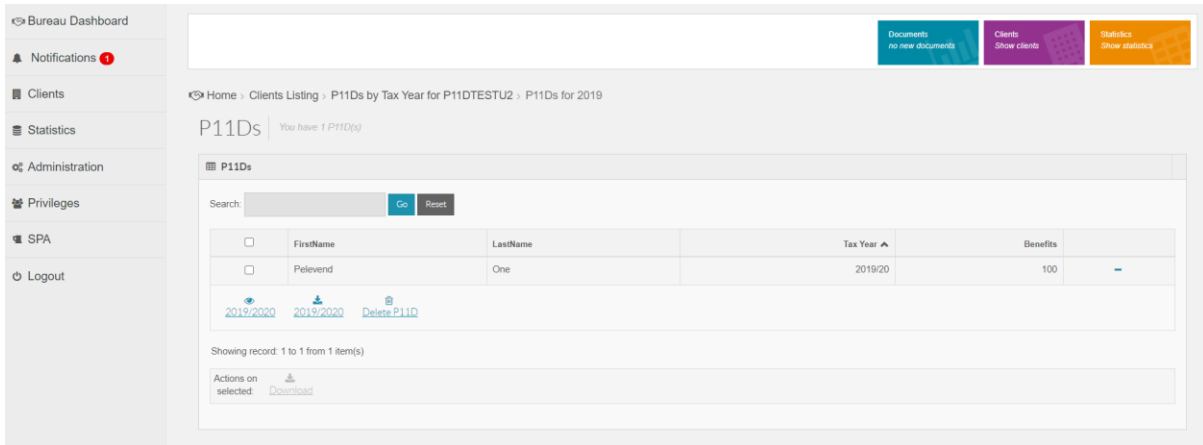
Online P11D view:
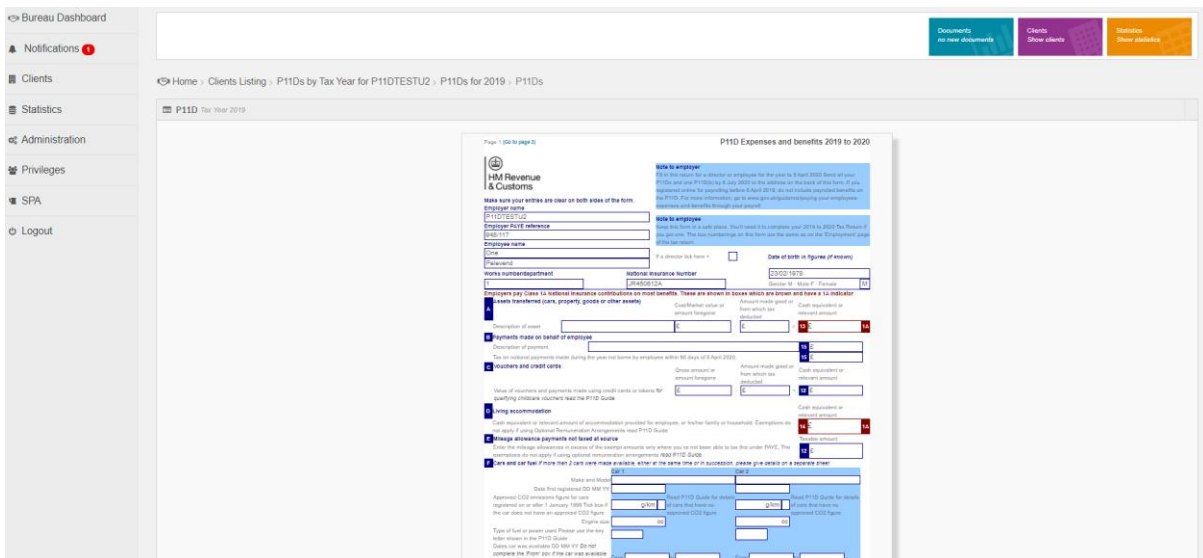
Deleting P11Ds

Deleting P11Ds – Complete tax year

Click on Employers, Select the Employer you require, click on the ePayslips icon, select P11Ds and the tax year.
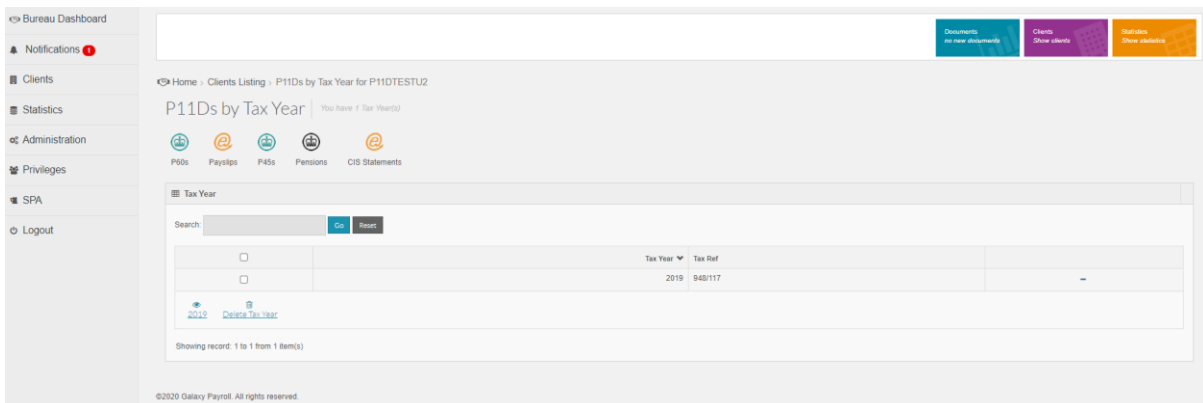
click on the **Delete Tax Year's P11Ds** action, a warning message will display. Choose **Delete** or **No** to cancel.
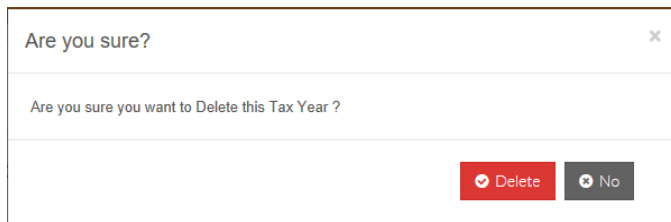
To Delete a P11D for an individual employee click on Employers, Select the Employer you require. Click on the ePayslips icon, select P11Ds and the tax year. Click on the View icon and select the employee from the listing.
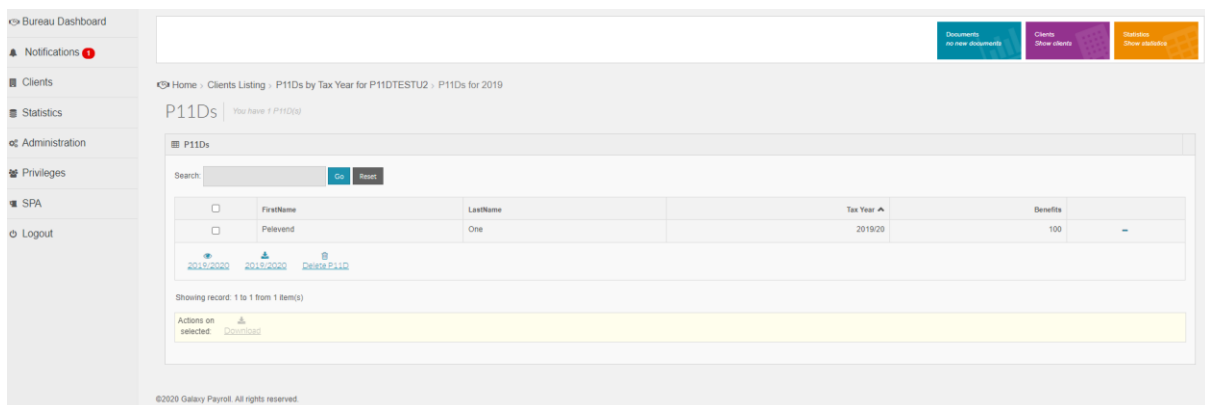
Closing a period

A warning will appear if you attempt to close the period with data remaining in the Secure Transfer Outbox.
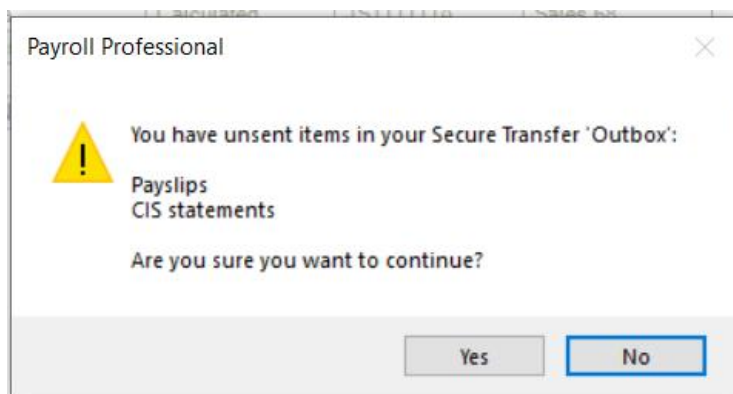
You can click 'Yes' to continue to close the period and to leave items not sent to the Portal or choose 'NO' and you can then send the data (**Data - myePayWindow**) prior to closing the period.

Sending Employee Auto Enrolment letters to the Portal

With Payroll Professional's auto enrolment module (AEM) and a correctly configured Pension set-up for the Payroll, Employee enrolment letters can be optionally delivered directly to their individual Portal accounts from the AE dashboard via the Secure Transfer Window. Letters can also be previewed before being sent from the Outbox in the myePayWindow Secure Transfer Window.

Employees need to be invited and have activated their accounts to access their letters.
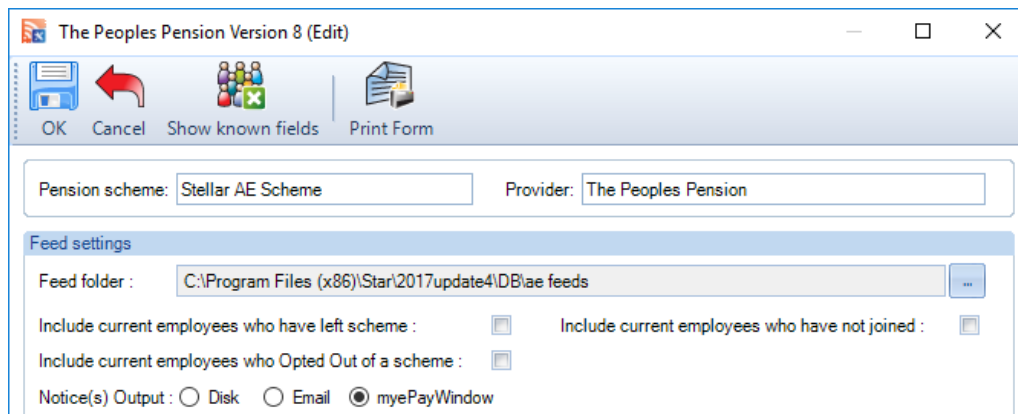
The following steps need to be taken to send AE letter to Employees:

Step 1 – Set-up Pension

Configure an AE Pension in Payroll Professional for the Employer/Employees (refer to separate documentation on how to do this).

Step 2 – Choose AE letter delivery destination
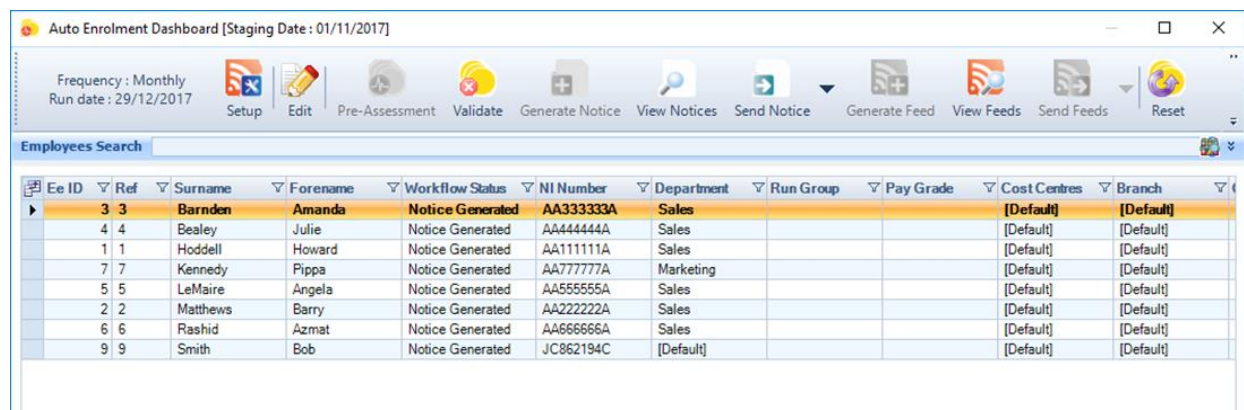
In an **Open Run**, go to **Auto Enrolment Dashboard**, Click on **Setup**, **Edit Feed**, then **Edit**. In the Feed Settings, set the 'Notice(s) Output' radio button to myePayWindow. Click on **OK** to save and exit back to the Dashboard.

Step 3 – Send Notice

To generate the AE letters, go to **Auto Enrolment Dashboard**, **Generate Notice** and then **Send Notice**. The notices will be generated and sent to the Portal Outbox (and also to the disk location specified)

A message box will notify how many employees have been processed and how many notices have been sent to the Secure Transfer Outbox.
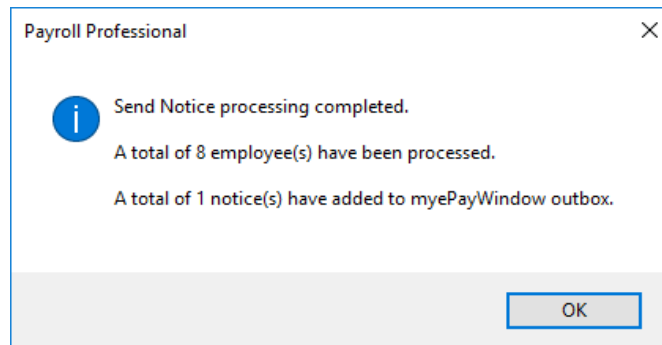
Step 4 – Send to Portal

Once the letters have been generated they will need to be sent to the Portal. Got to the **Data** tab in Payroll Professional and select **myePayWindow** to access the Secure Transfer Screen.
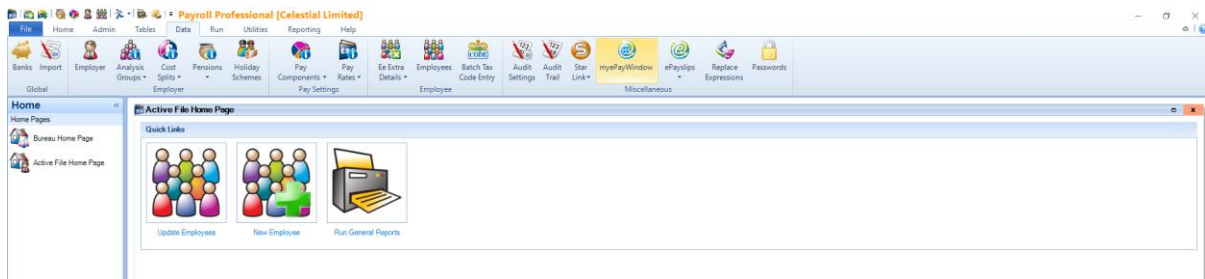

If you want to preview the letters before they are uploaded either double-click on a line-entry, right-click and choose from the options or click on the **view** button from the top menu. Any of these options will open the document on screen for viewing before sending.
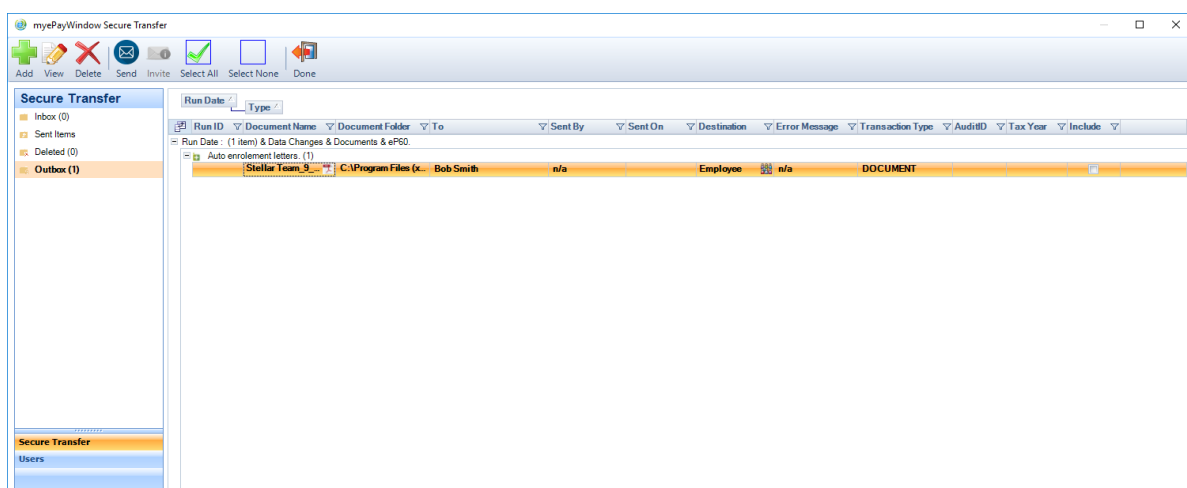
In Payroll Professional go to the Secure Transfer Screen, click on **Send**

If you choose to preview the AE letter, it will display in a separate window for viewing:
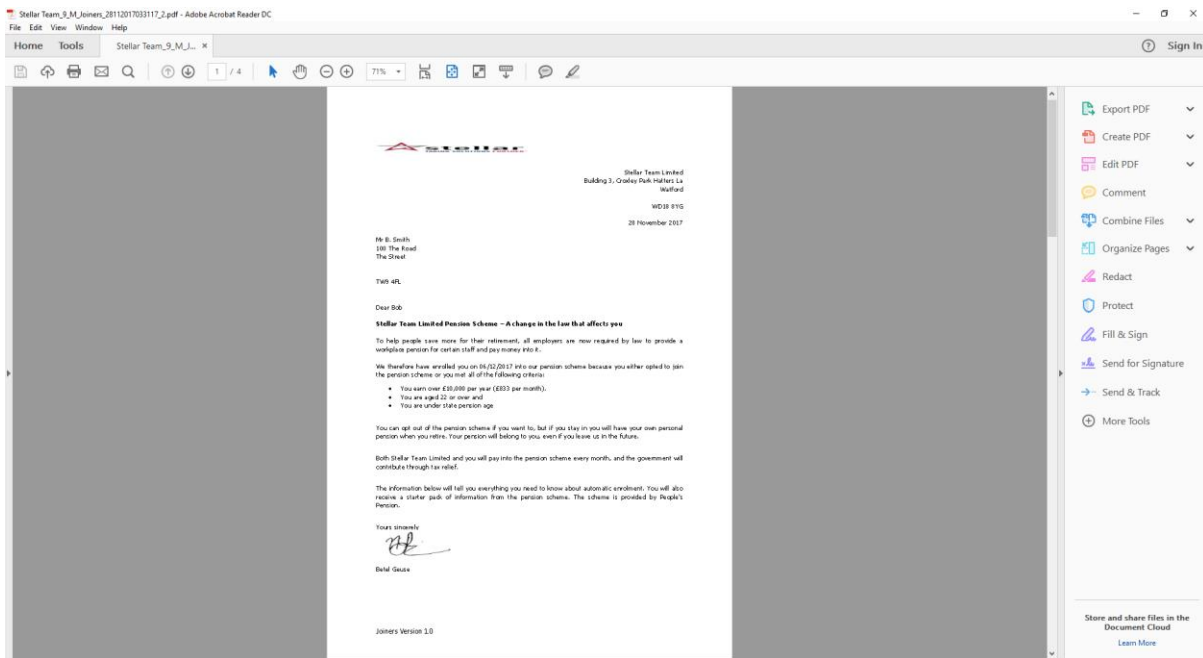
Step 5 – Notice delivery

The AE letter will be delivered to the Employee's Portal account (Documents area), they will receive a Portal notification to indicate a new document has been delivered. The letter can be downloaded and/ or viewed by the Employee from the Portal. AE letters will be automatically deleted 12 months after the date uploaded. Employees will be notified in the Portal prior to deletion.
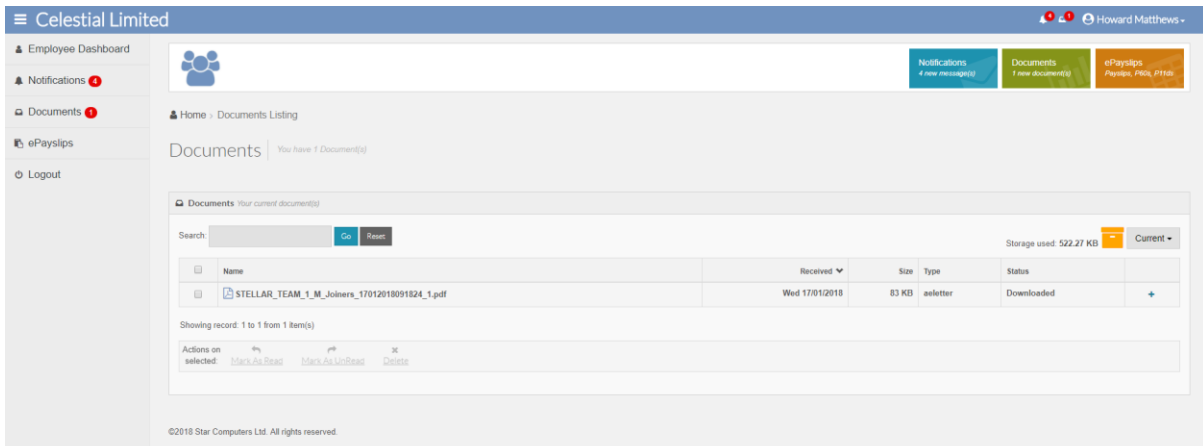
Sending Payroll reports to Employers

Any Payroll Professional standard or custom report can be sent to the Portal to Employers, provided that the report is exported to PDF format. Existing or new Macros and Group reports can also be sent to the Portal for the Employer. All reports are generated in payroll first and then added to the Secure Transfer outbox from where they can be sent at the appropriate time.

Standard single report

From the Reporting tab choose Run General Reports, Custom Report, or choose from Favourites.
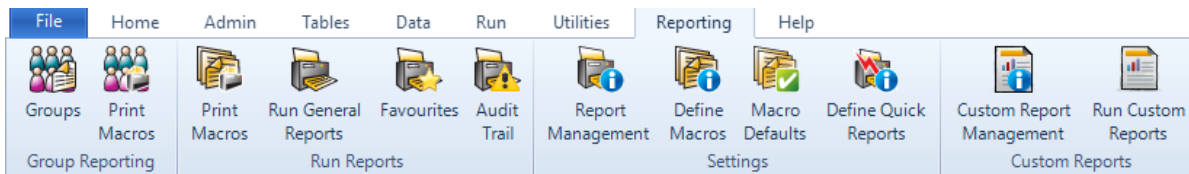
Step 1 – Generate Report

Select the report you want to run, **Run** the report:
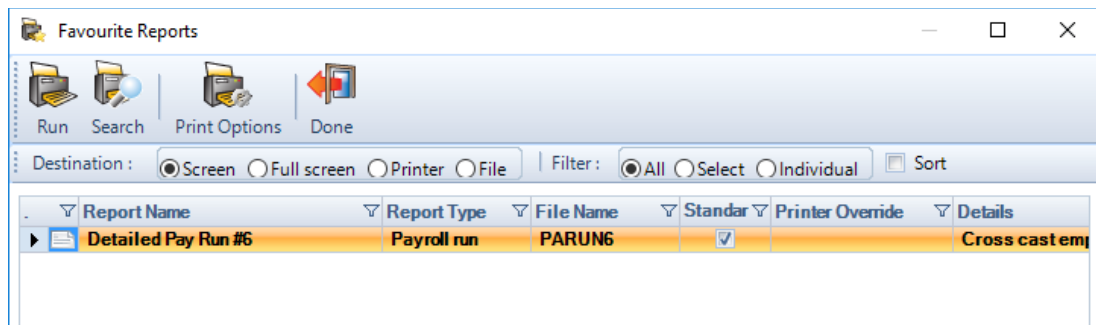
Step 2 – Export report to Portal

Choose Export to change the settings for delivery to the Portal:
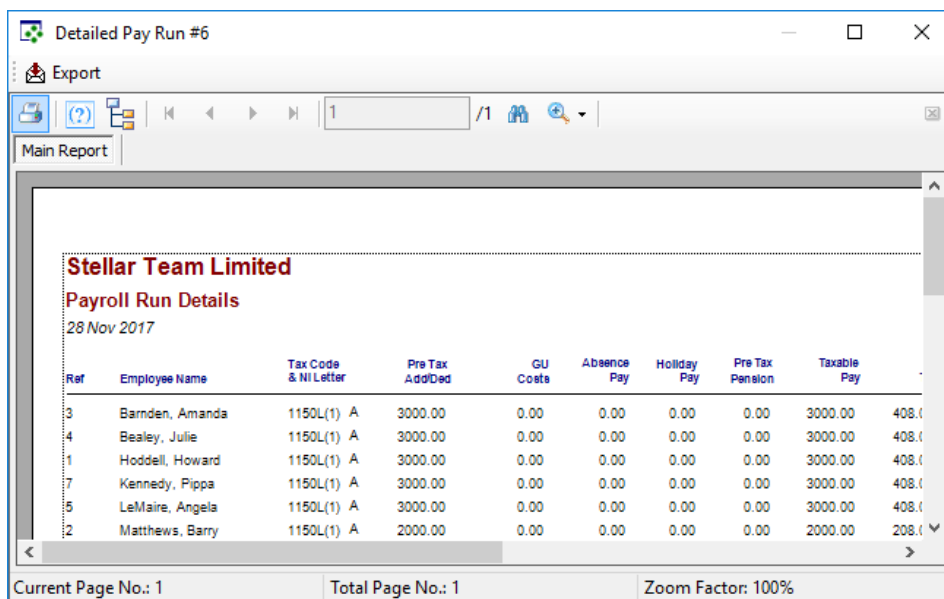
- Export file type must be PDF
- Export destination set to Portal
- File location should be an area where all users can access such as a client file
- File name can be re-named as required

Click **OK** on the Export options, then select for one or more Employer recipients (use shift and select key), each user will receive a Portal notification.

A message box will display confirming that the report has been generated and added to the secure transfer window, ready to be sent to the Portal.
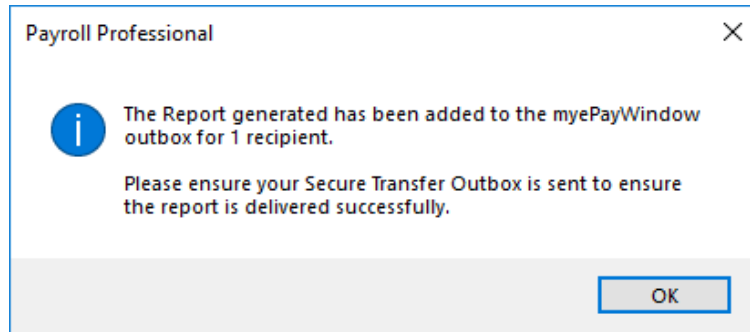
Step 3 – Send report to Portal

To send the report to the Portal, go to the Secure Transfer window from either the **Data** tab, **myePayWindow** or through an **Open Run**, **myePayWindow** and click **Send**.

Note: If you have not yet finalised payslips for sending to the portal make sure that you send reports from **Data** tab, **myePayWindow** and that any ePayslips in the outbox are <u>not selected</u> (refer to Uploading Payslips section)
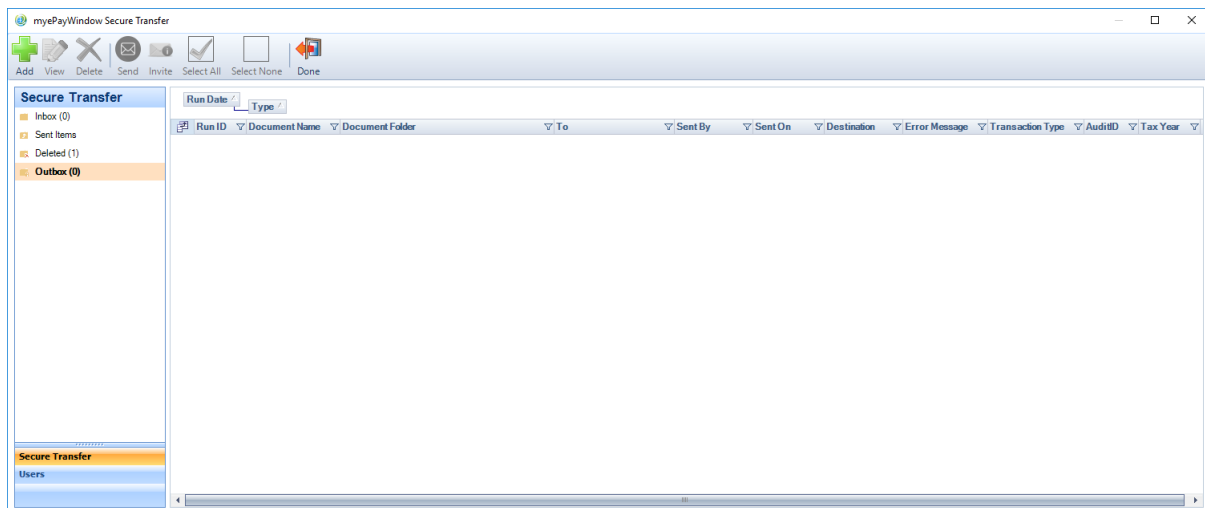
Print Macros

Existing and New Print Macros can be delivered to the Portal. Refer to Payroll Professional separate documentation on how to create Print Macros.

Step 1 – Run Print Macro Wizard

Go to the **Reporting** tab and select **Print Macros**, follow the Wizard steps as normal, choosing the Macro and the reports to include:
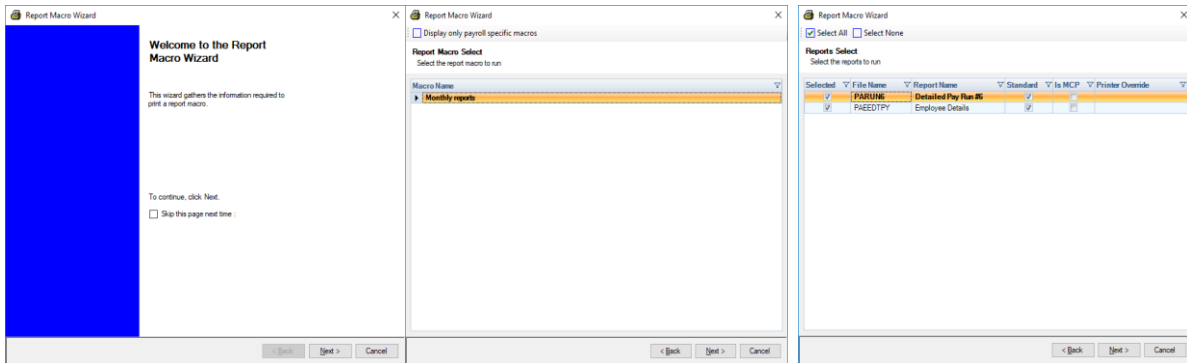
From the Options page, **Report Destination** area select the Portal radio button:
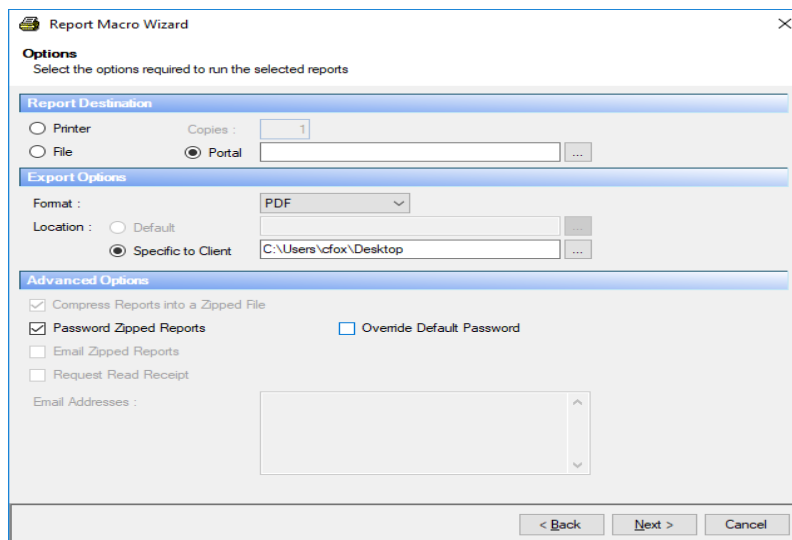
Next to the Portal Radio Button, click on […] ,to select the Employer user to whom you wish to send the Print Macro ('shift and click' to select multiple users) Click on **OK**, to complete.
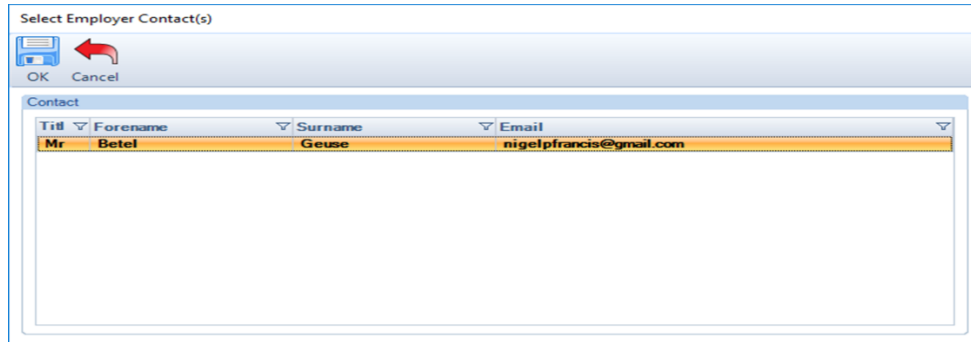
Next select the file path, this needs to be in a shared area accessible to all staff, for example a client folder. Click on **Next** to continue.
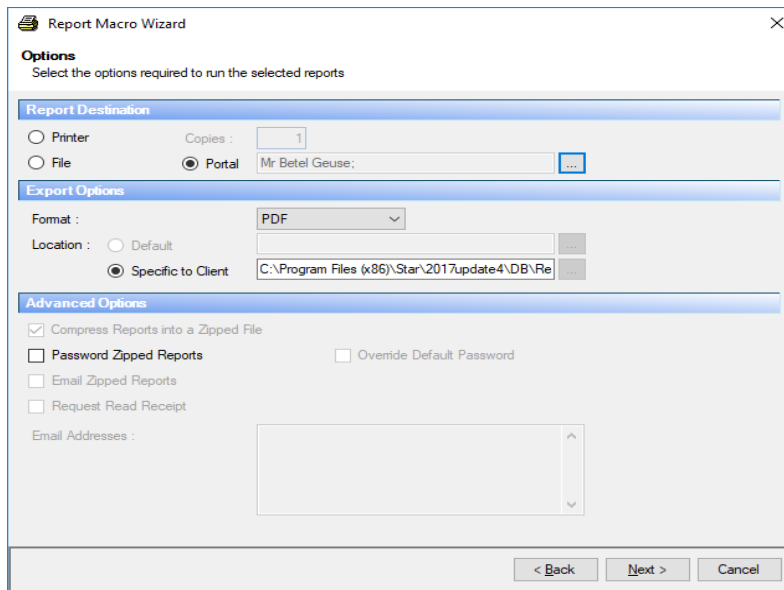

The wizard will now complete the generation of the Macro, click **Finish**.
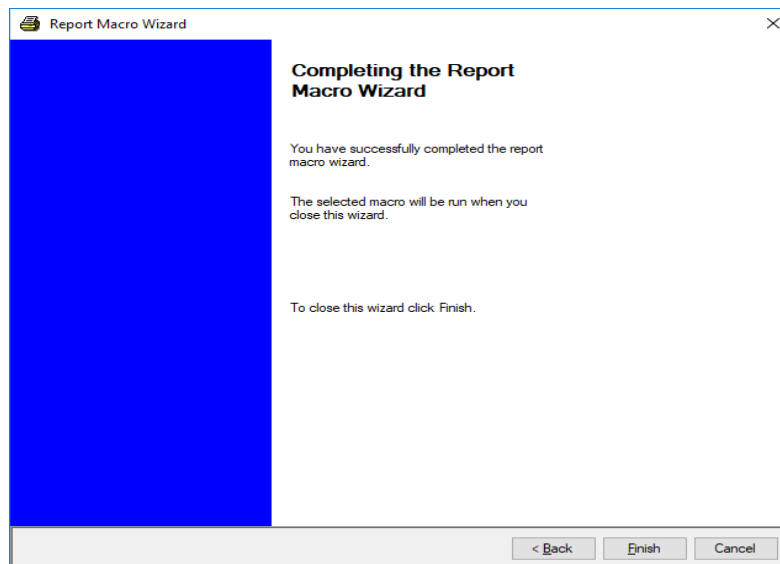
The report progress bar will appear on screen followed by 2 successive confirmation messages. The first confirms how many recipients will receive the Print Macro and that it is added to the Outbox in the Secure Transfer Window. Click **OK** to continue, a final message confirms the Macro has been generated.
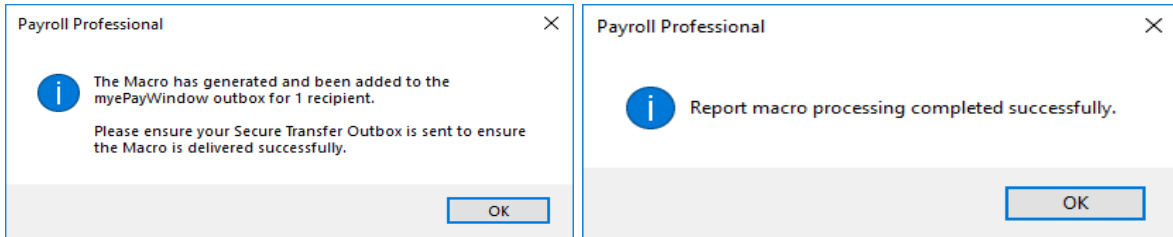
Close the progress bar by clicking on **Done**.
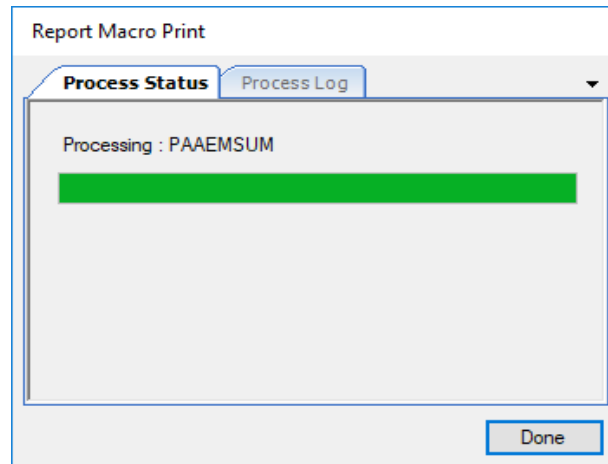
Step 2 – Send Print Macro to Portal

To send the Macro report to the Portal, go to the Secure Transfer Window from either the **Data** tab, **myePayWindow** or via an **Open Run**, **myePayWindow** and **Send**. If you wish to preview the macro contents before sending, click on the file and then **View** from the menu bar.

Note: If you have not yet finalised payslips for sending to the portal make sure that you send Print Macro from **Data** tab, **myePayWindow** and that any ePayslips in the outbox are not selected (refer to Uploading Payslips section)
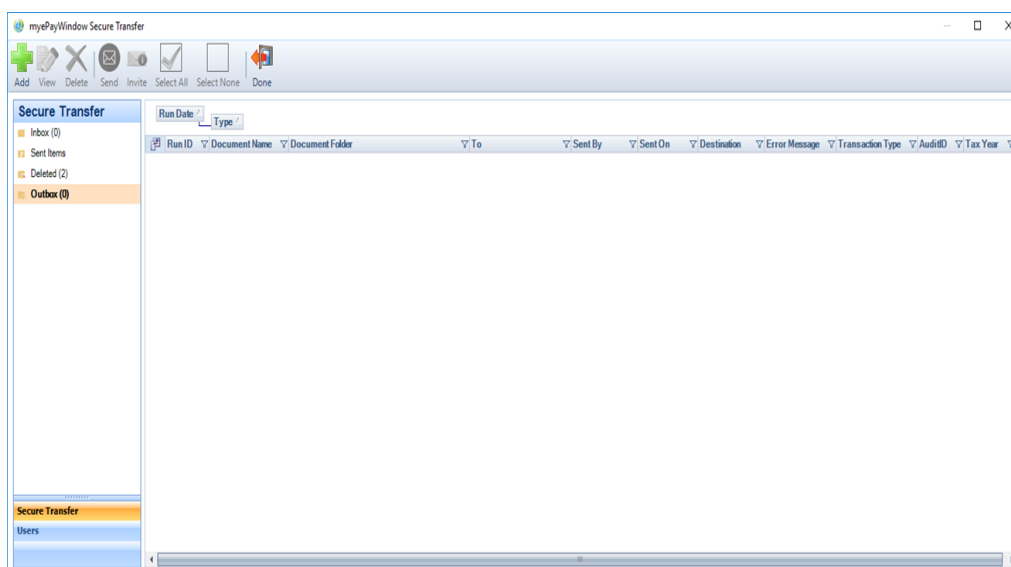
Click **Send** to deliver the Print Macro to the Employer user recipients chosen.

Group reporting

Existing and New Print Macros for Group Reporting can be delivered to the Portal. Refer to Payroll Professional separate documentation on how to use Group Reporting and Print Macros. Group reporting is done in Payroll Professional without an open Payroll data file.

Step 1 – Generate Group Reports

Go to the **Reporting** tab and in the Group Reporting group, choose **Print Macros**.
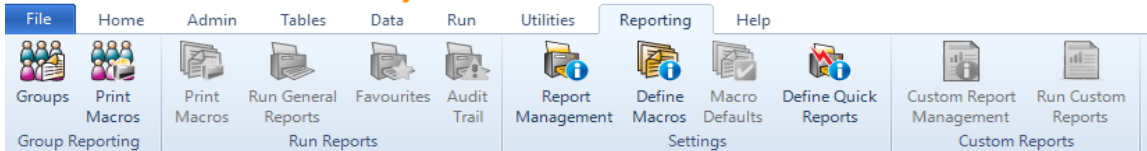
Note: The recipients for Group reporting are set per payroll data file on the **Data, Employer** details (Edit) screen. In the section Client Report Macro Settings. See the section, Setting Employer contacts for Group reporting.

Follow the Wizard steps as normal, choosing the Reporting Group, the Payrolls:
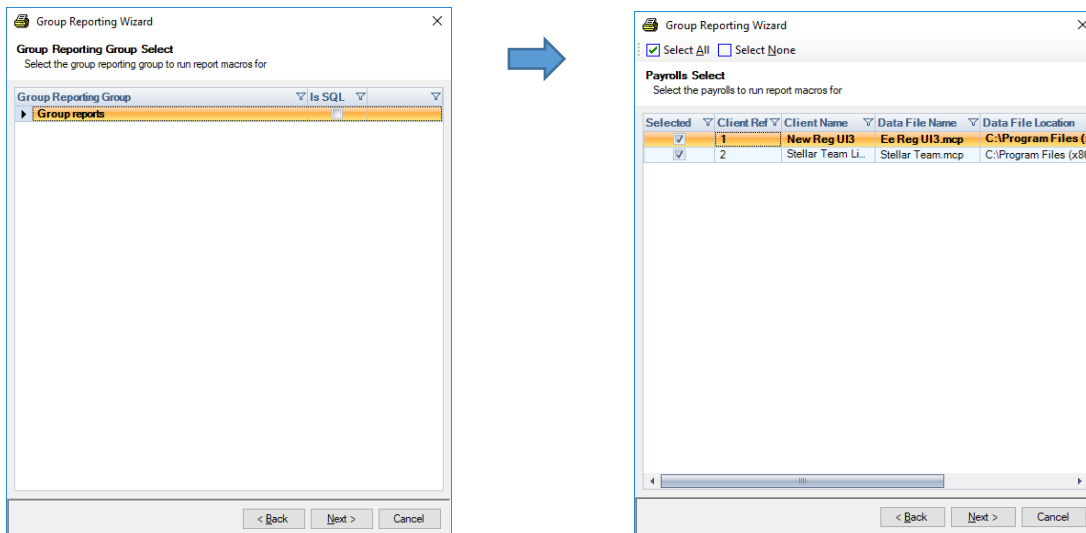
And the Report Macros and reports to include:
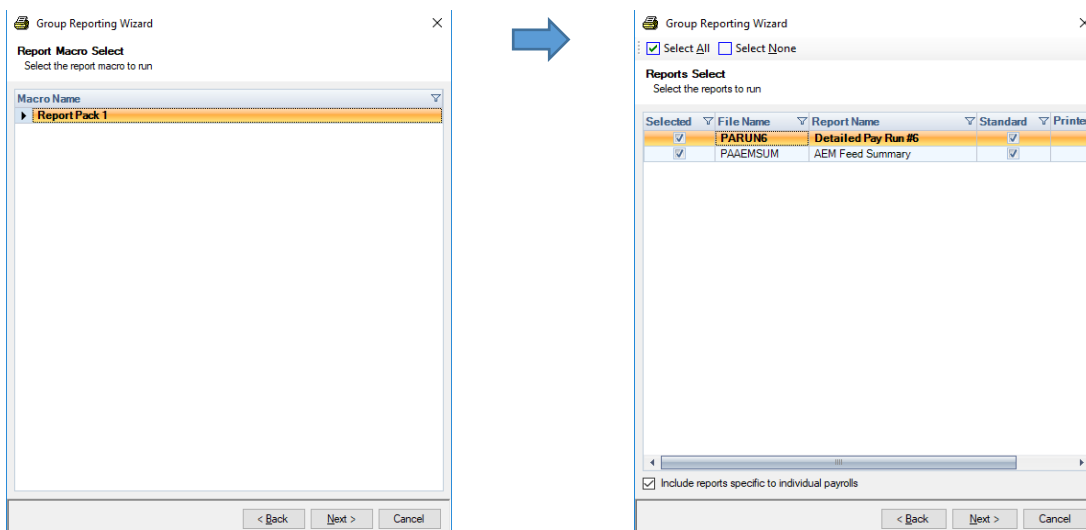
From the Options page, **Report Destination** area select the Portal radio button then set the **Export options** to PDF Format, next set the file location path, Click **Next** to continue.
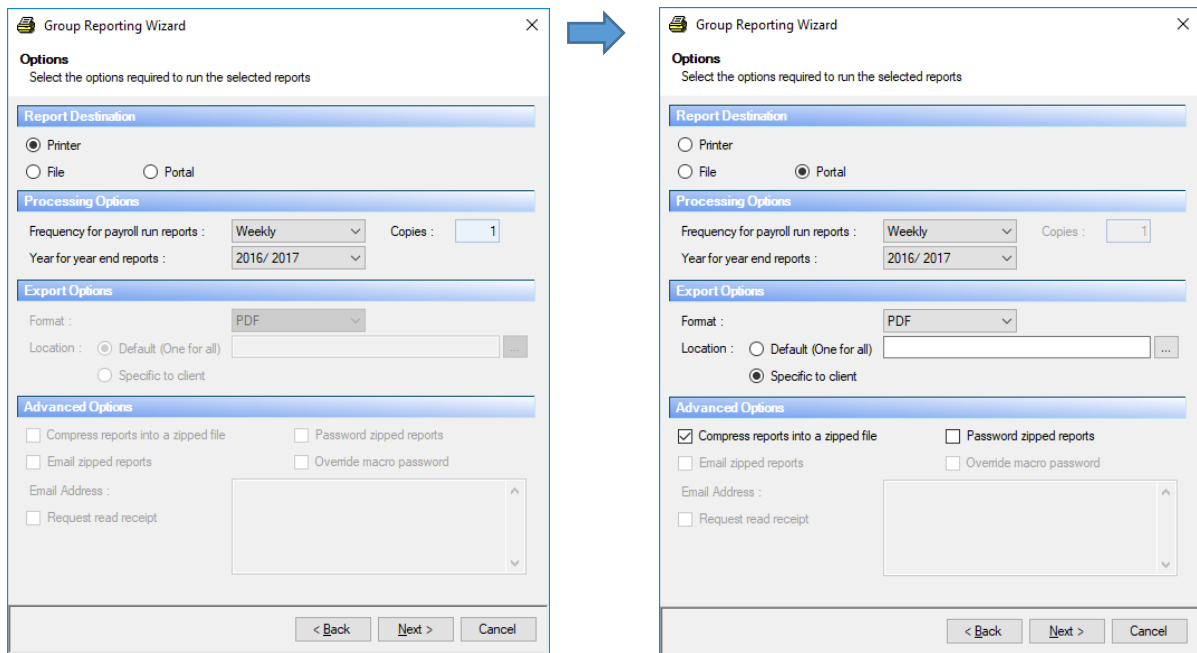
The Group reporting wizard will finalise, click **Finish**.
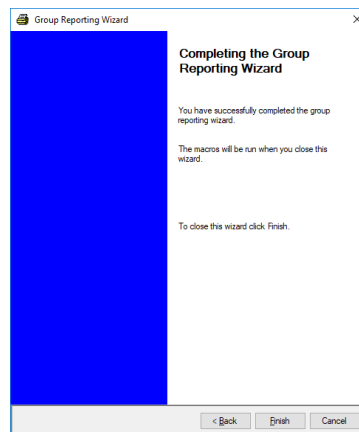
The process status bar will display as the reports are created for each Employer in the reporting group and for the Default Employer Contacts set up.
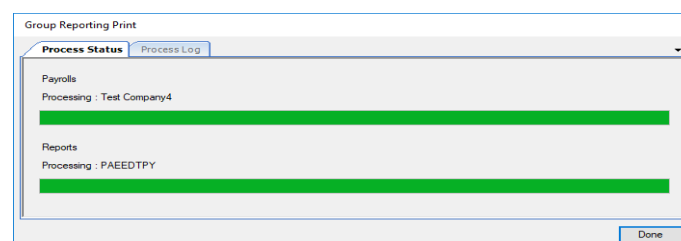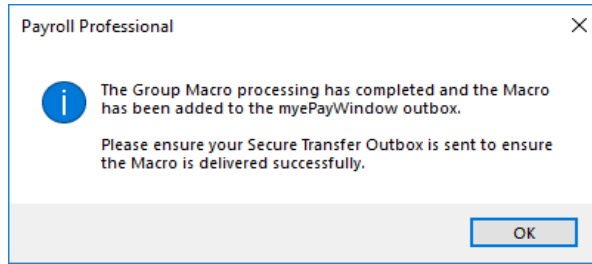
An initial message confirms the Group Macro has been completed and confirms that reports have been sent to the Outbox (in the Payroll data file) for each Employer in the reporting group, click **OK** to continue.
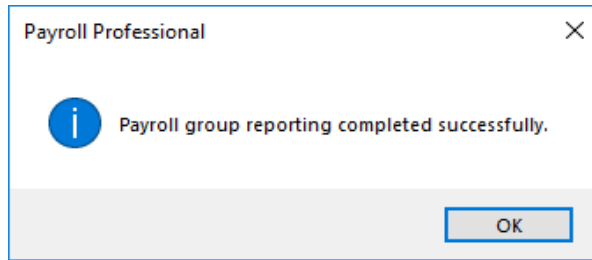
A final message confirms the group reporting is completed, click **OK** to continue. Click Done, to Close the status bar.

Step 2 – Send Group Reports to Portal

To send the Group report, open the Payroll Data file for each Employer within the reporting group and go to the **Data** tab, **myePayWindow**, and click **Send**. Reports can be previewed prior to sending to the Portal. (N.B. This process needs to be completed for each Employer in the group)

Note: If you have not yet finalised payslips for sending to the portal make sure that you send Group reports from **Data** tab, **myePayWindow** and that any ePayslips in the outbox are <u>not selected</u> (refer to Uploading Payslips section)
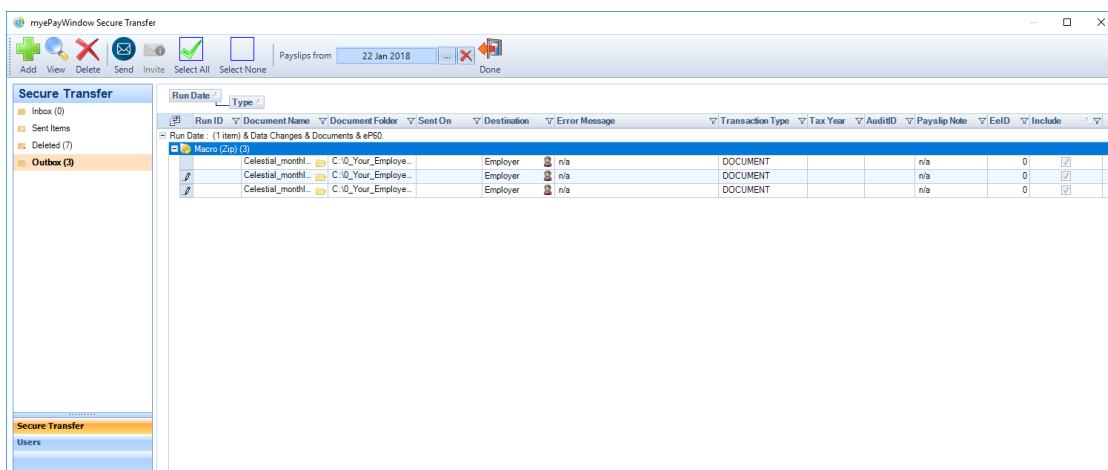
Reports in Portal

Employer Users will receive Portal notifications to inform them when a report / report pack has been sent to them by a Payroll department user and these will be delivered to the Employer Documents page:

Single reports will appear with the payroll generated report name (unless this was renamed when exported from Payroll)

Macro names appear as Macroname /Type/ ClientRef /dataID/date& time
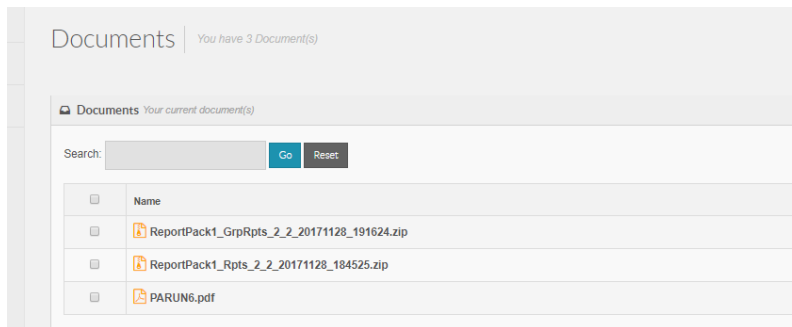
Using 'Add' in Secure Transfer to send documents

The secure transfer window accessed either from an **Open Run** or from **Data** provides a mechanism to securely deliver existing documents to both Employee and Employer Portal user accounts (to their respective Documents area) using the **Add** button.

From the secure file upload screen, choose from one of the following document file types:

AE letter (to Employees)

This allows a previously generated AE letter (in PDF format) to be delivered to an individual Employee – The Employee will receive a Portal notification that 'a new AE document is waiting'

Employee Document (to Employees)

This allows any document of the type: PDF, DOCX, XLSX, XML, TXT, CSV, ZIP to be delivered to an individual Employee - The Employee will receive a Portal notification that 'a new document is waiting'

Report (to Employers)

This allows an existing Payroll report (in PDF format) to be delivered to one or more Employer Users (simultaneously) in the Portal – The Employer will receive a Portal notification that 'a report is waiting'

Macro (to Employers)

This allows an existing Print Macro or Group Report Macro (in ZIP format) to be delivered to one or more Employer Users (simultaneously) in the Portal – The Employer will receive a Portal notification that 'a report pack is waiting'

Other (to Employers)

This allows any document of the type: PDF, DOCX, XLSX, XML, TXT, CSV, ZIP, PRCX to be delivered to one or more Employer Users (simultaneously) in the Portal - The Employer will receive a Portal notification that 'a new document is waiting'

After selecting, the file type, use the [...] to choose the 'To:' recipient (s), and for the filename [...] to pick the files from your folder location: Finally click **OK** to send the documents to the **Outbox** of the Secure Transfer Screen. Remember to click **Send** to deliver these to the recipients from the Secure Transfer screen.
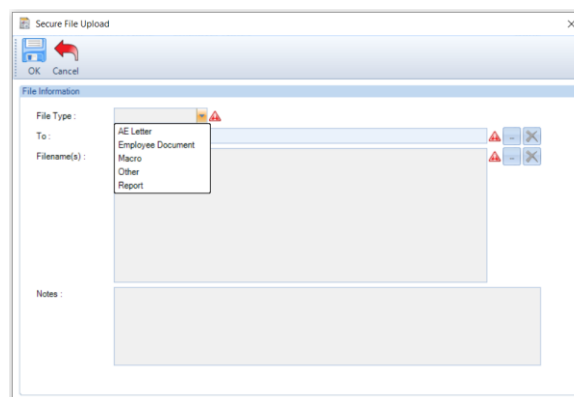
Multiple files can be selected to upload to a recipient

Based on the selected file type you will be presented with a list of employer or employee users to send the document to.
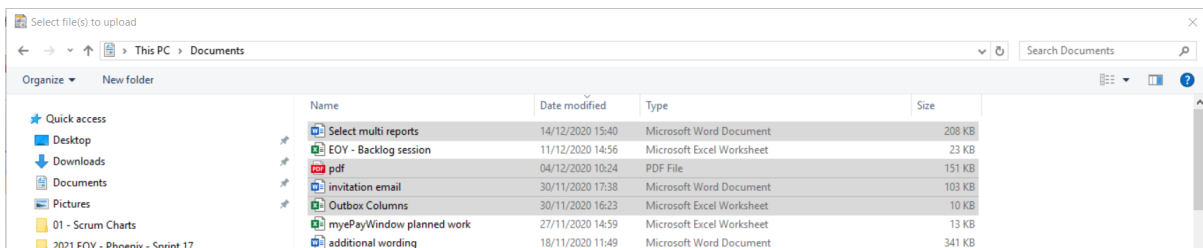
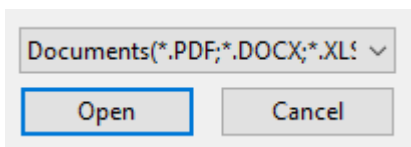Highlight the user you wish to upload the document to and click on select
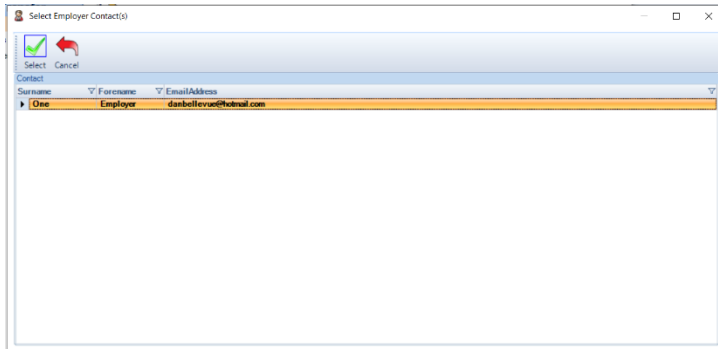
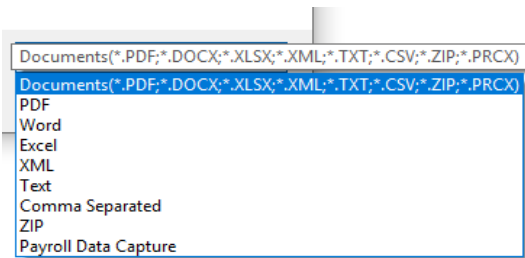Click on the ellipsis button on the right-hand side to select the documents for upload
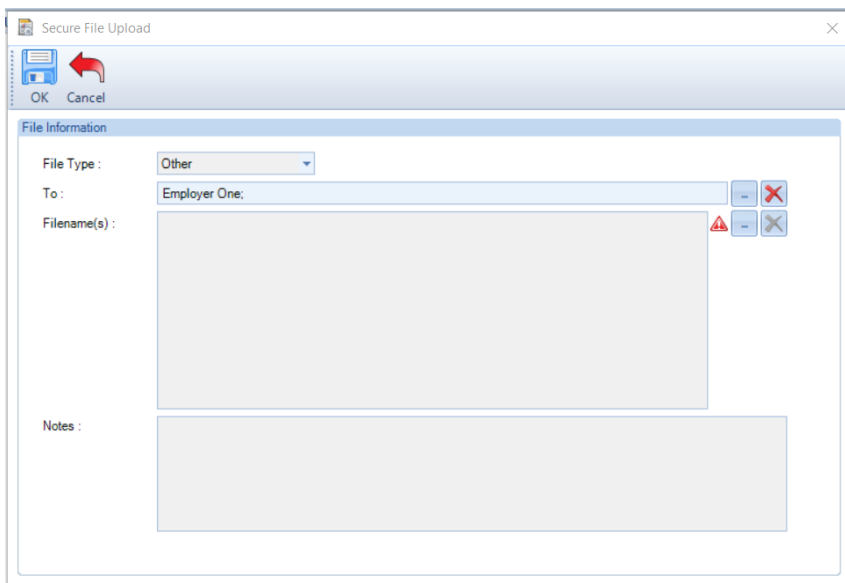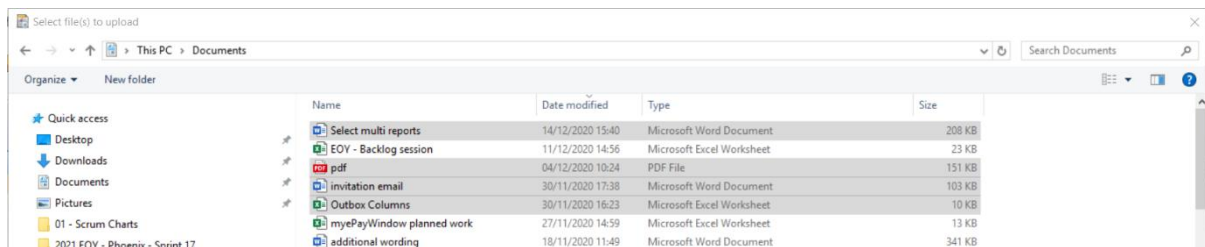

Search for your document folder

You will have the option to select the type of file e.g., PDF, Excel. The default in the list is all documents that are available to upload.
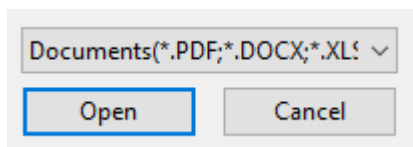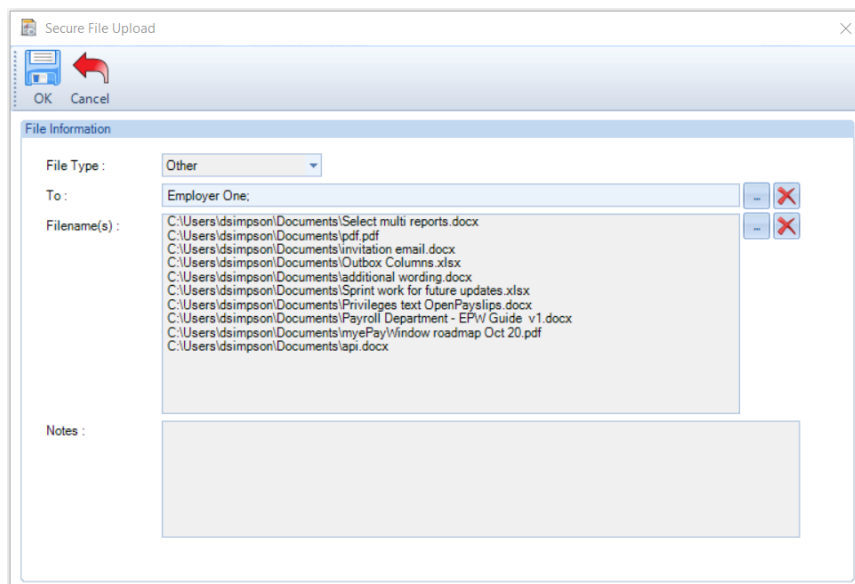
Documents(*.PDF;*.DOCX;*.XLSX;*.XML;*.TXT;*.CSV;*.ZIP;*.PRCX)

Documents(*.PDF;*.DOCX;*.XLSX;*.XML;*.TXT;*.CSV;*.ZIP;*.PRCX)
PDF
Word
Excel
XML
Text
Comma Separated
ZIP
Payroll Data Capture

Hold Ctrl on the keyboard and select the documents you would like to upload

Click on **Open**

These documents now appear in the secure file upload screen

You can add a note here, this note will appear on the notification and documents section on myePayWindow.

myePayWindow.
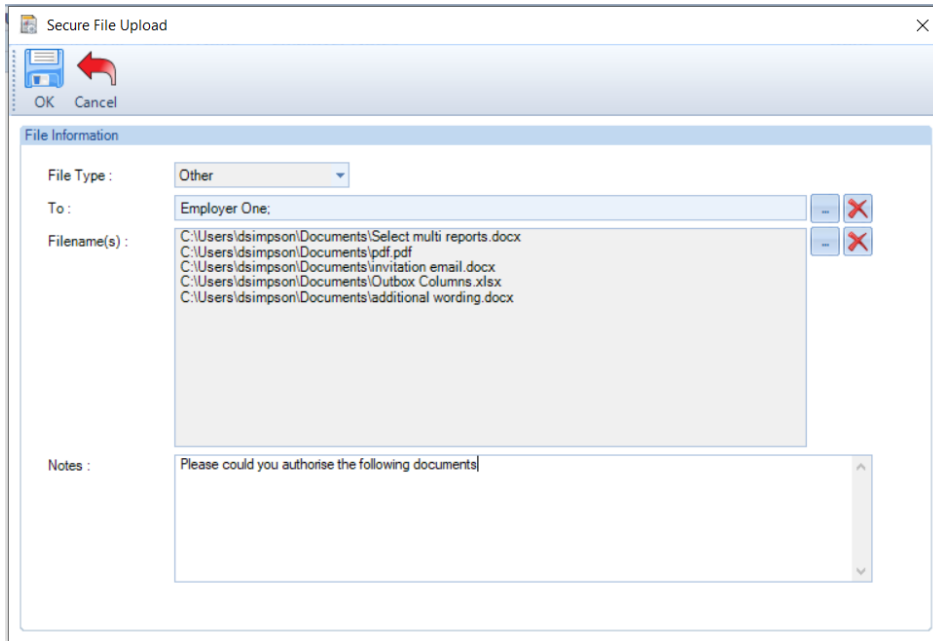
Click on **Ok**

The selected documents now appear in the outbox, ready to send.
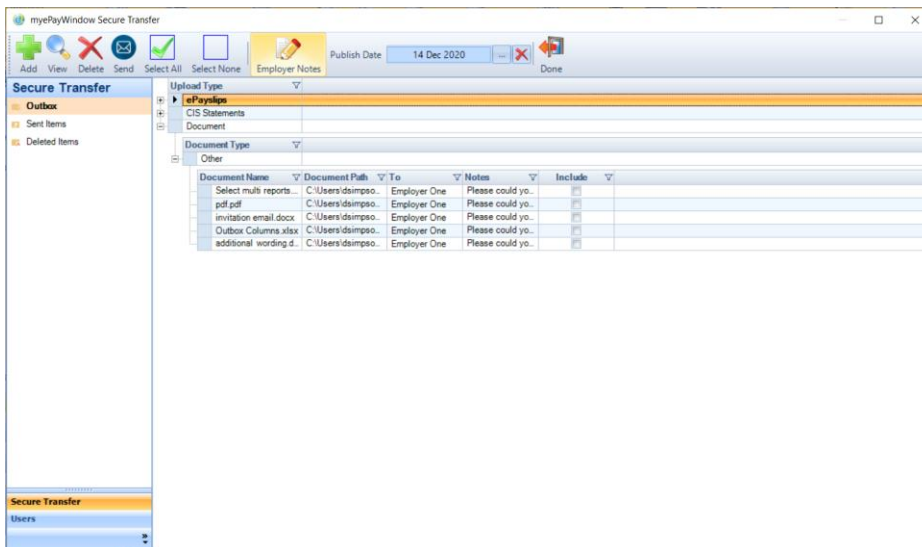
Select individual documents by ticking the include box or select all, to unselect click on select none.
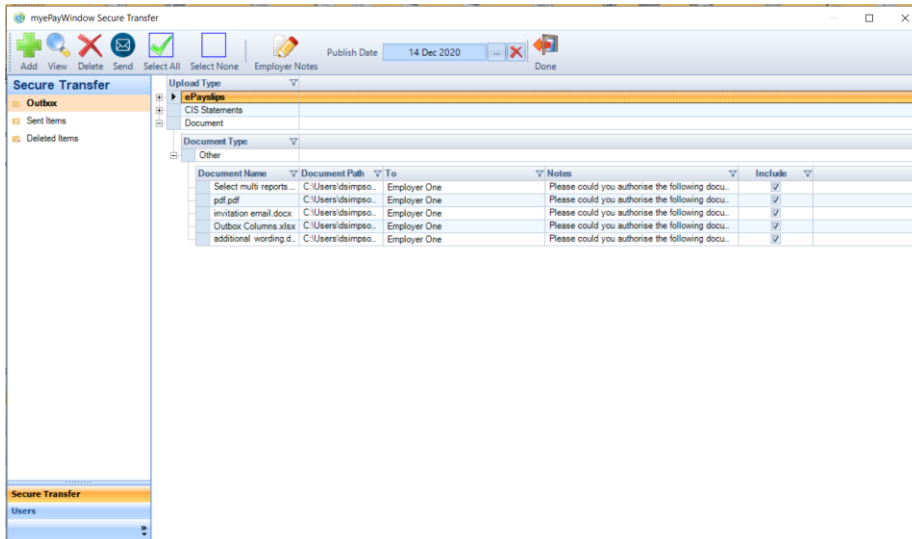
Once the items have been sent the user will be able to view and access the documents in their account.

Document File Upload – Increase to 10MB – Outbox

We have increased the size of a single document upload to 10MB. If you attempt to upload a document that exceeds 10MB you will receive a message.
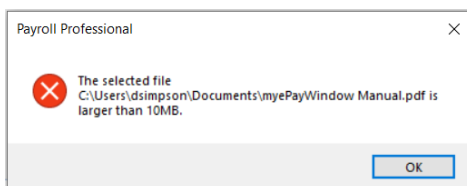
Note: It is advisable to minimise the file sizes you send as monthly 'fair usage' will apply (so use ZIP,PDF where possible)

Export Pre Reports to the Outbox

To Export Pre Reports to the outbox you will need to have a default employer contact set up for myePayWindow under **Data/Employer Details/Client report macro settings.** Select the **myePayWindow** tab. If you do not have a default employer user set click on the ellipsis button to select the user/s
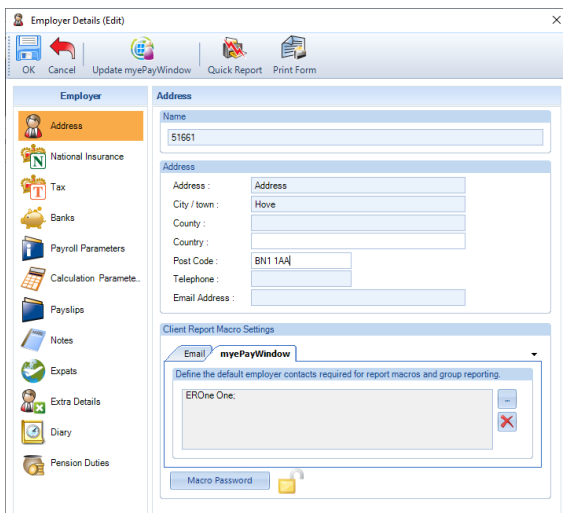
From the **Utilities** menu select **Pre**
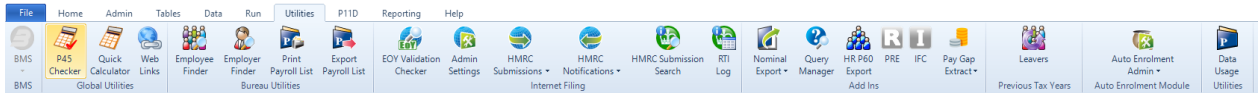
Select the frequency and date, **Ok**
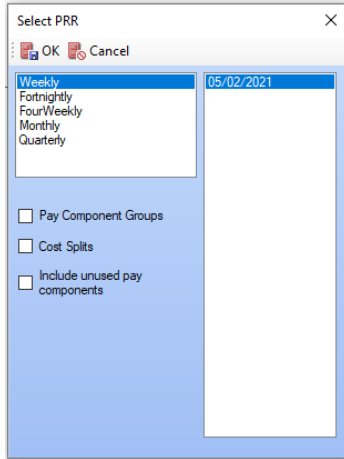
Select Export to Excel
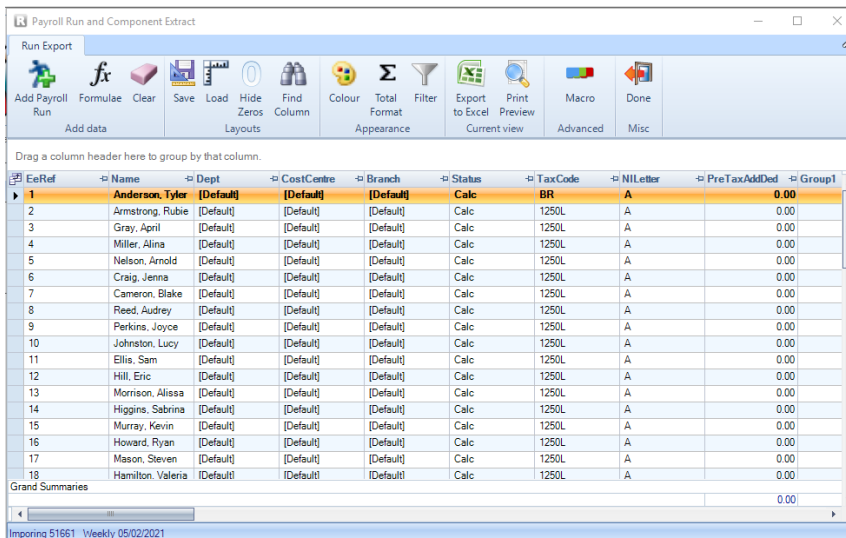
Enter the file name. Confirm that you would like to add the report to the outbox
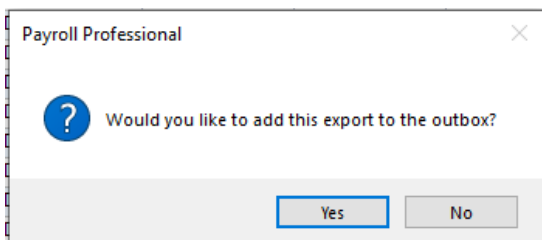
A message will confirm that the report has been added to the outbox
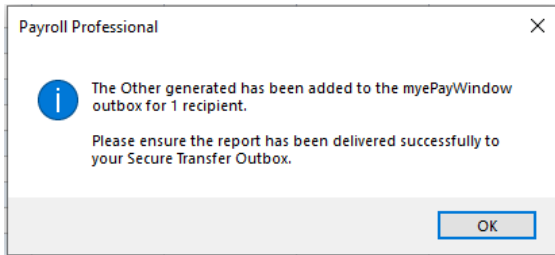
From **Data/myePayWindow** you can view the Pre report ready to send. Select and **Send.** The Employer User can now view/download the document in myePayWindow
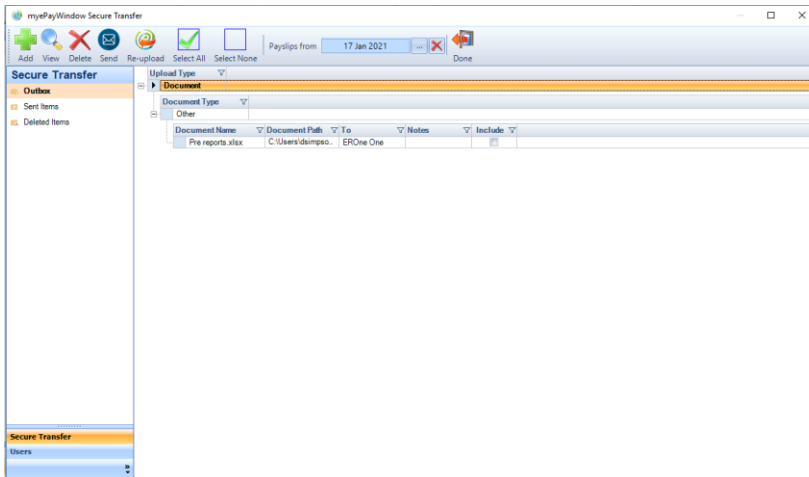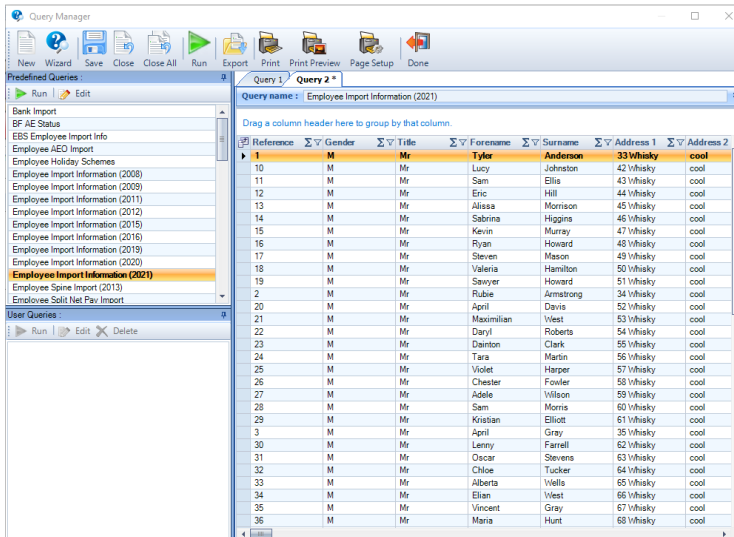

Export a query to the outbox

To Export a query to the outbox you will need to have a default employer contact set up for myePayWindow under **Data/Employer Details/Client report macro settings.** Select the **myePayWindow** tab. If you do not have a default employer user set, click on the ellipsis button to select the user/s
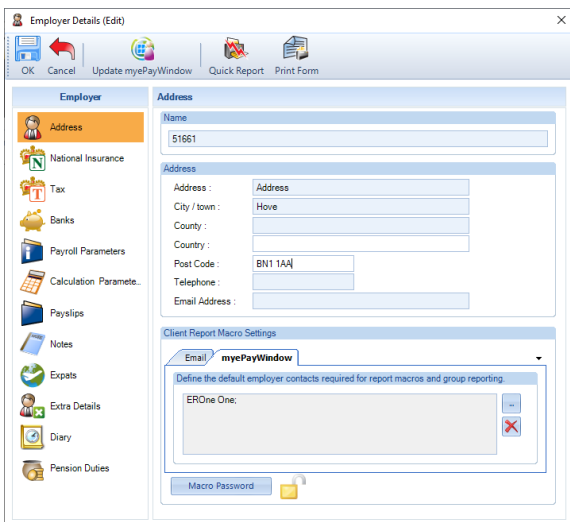
From the **Utilities** menu select **Query Manager**
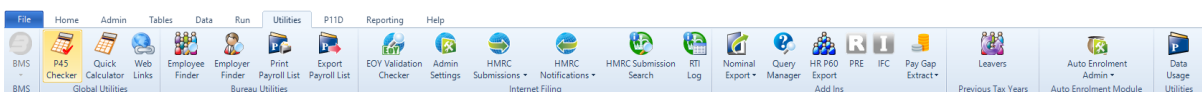
Run the selected query. Select **Export**

Select myePayWindow under Export options. Select ok
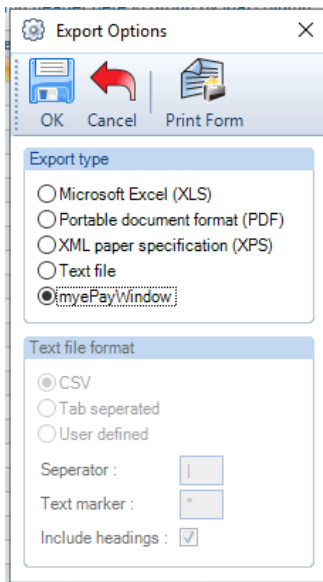
Enter the filename

A message will confirm that the report has been added to the outbox
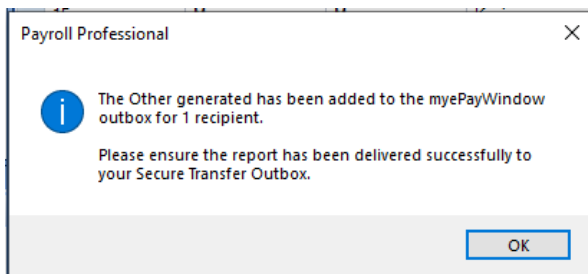
From **Data/myePayWindow** you can view the Query ready to send. Select and **Send.** The Employer User can now view/download the document in myePayWindow
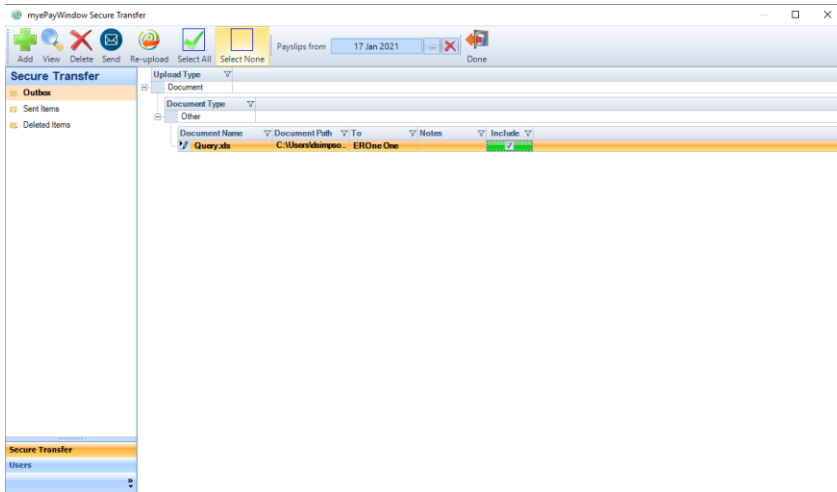
Secure Transfer Outbox features

See below for specific features available in the myePayWindow Secure Transfer Screen accessible either via **Open Run** or **Data**.

Data Grouping and Sorting

By dragging column headings to the area above the headings the data is Grouped and sorted accordingly. For example, Run Date and Type.
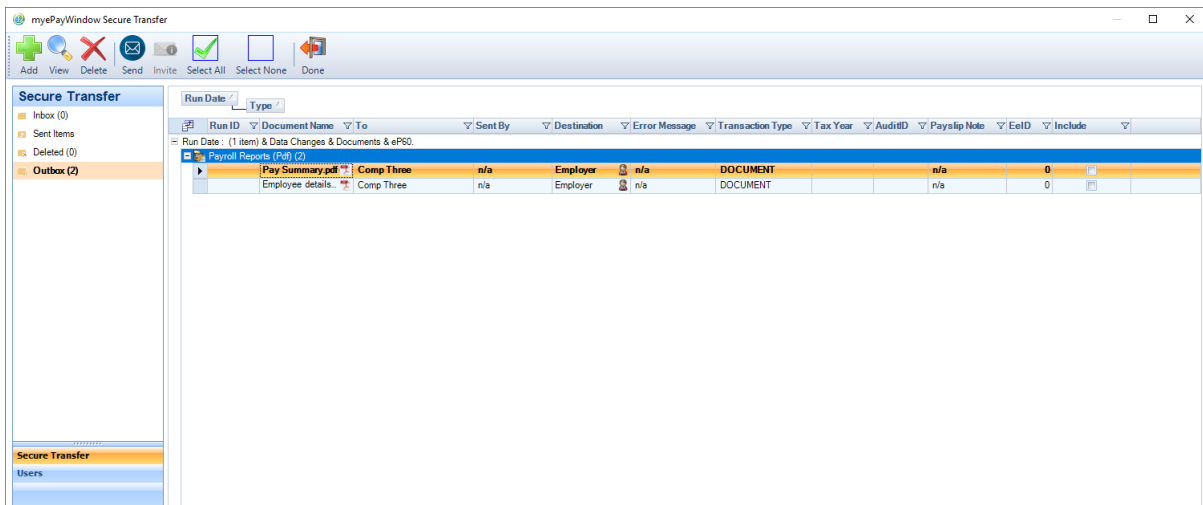
Audit trail

To see a list of previously submitted or deleted data and documents from the Secure Transfer window use the **Sent or Deleted** options in left pane of the Secure Transfer screen. To expand an entry in the list, click on the **+**.

Note: The Inbox (0) is not implemented in this release.
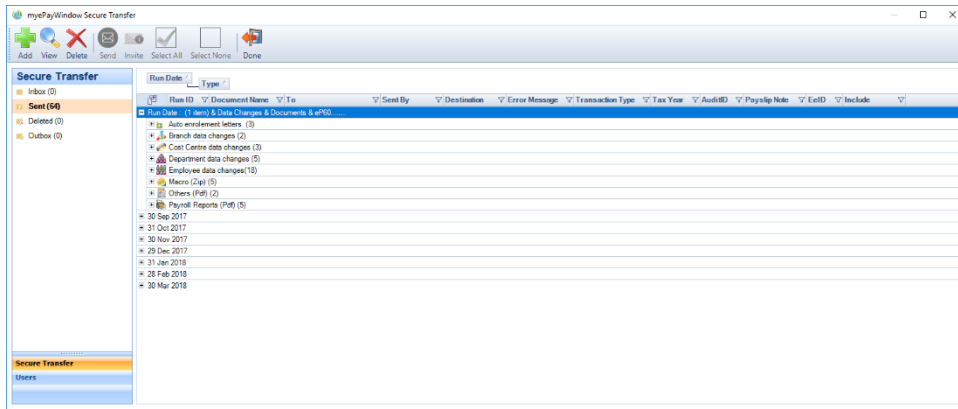
Standard Payroll functionality is available by right clicking on an item. The following actions are available:

- Preview Documents – reports, Macros, letters uploaded to Portal
- View Notes added – any note added to a payslip
- View Audit screen for 'update' data entries – e.g. data changes to Employer or Employee

Audit Screen

The standard Payroll Professional audit screen can be accessed for those entries in the Secure Transfer Screen with an Icon in the **AuditID** column:
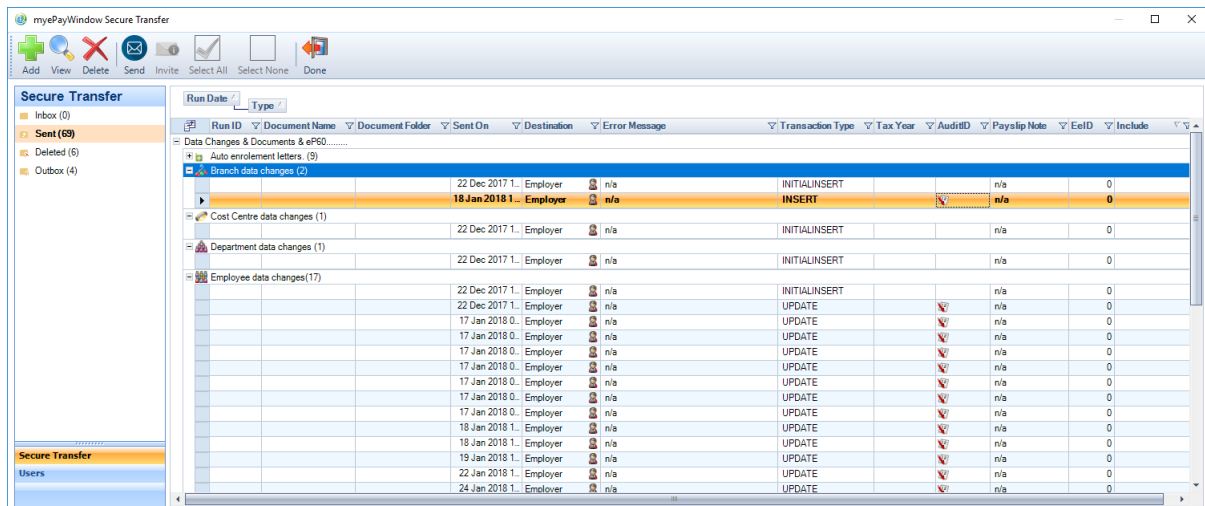
Double-click the icon to open the Audit Screen for the entry selected.
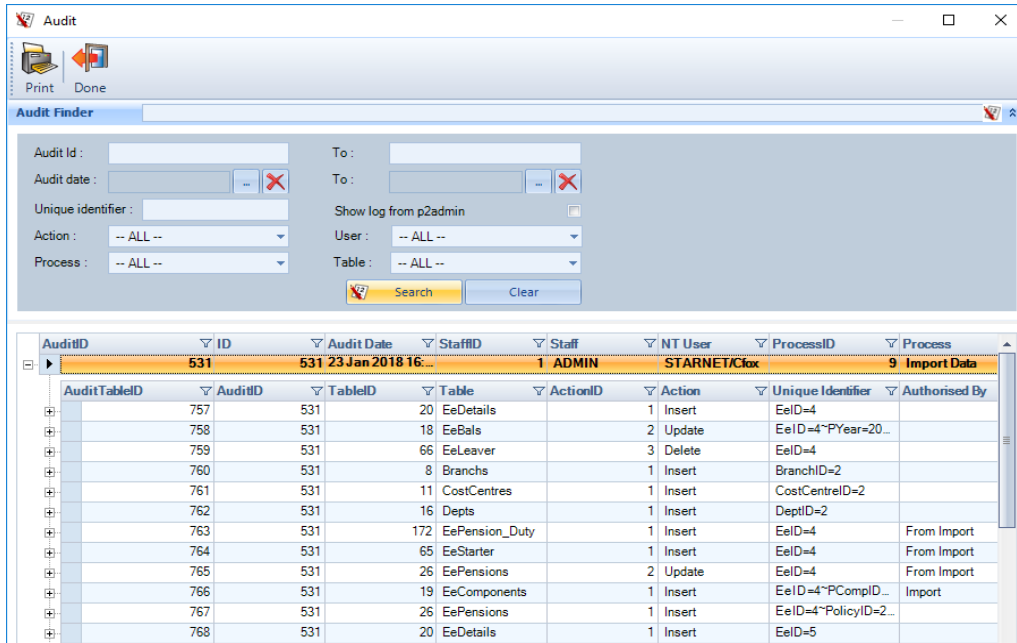
The Audit screen allows for detailed search and export as per the normal functionality.

Portal scheduled maintenance

From time to time myePayWindow will require maintenance updates which are normally conducted outside normal business hours. During periods of maintenance the myePayWindow website will be taken out of service. If a user tries to access functionality in Payroll Professional that depends on the Portal or tries to access the website directly through a web browser the following messages and pages will be displayed:

In Payroll Professional

When attempting to update **Bureau details** (in the example below) or **Employer details**:

When site maintenance is in progress, screens that show status, will show status as 'unknown':

Staff:

Employer users:

Data, secure transfer, Users (Employees):

myePayWindow

During periods of maintenance the myePayWindow website will be taken out of service. If a user tries to access the website directly through a web browser the following message page will be displayed:
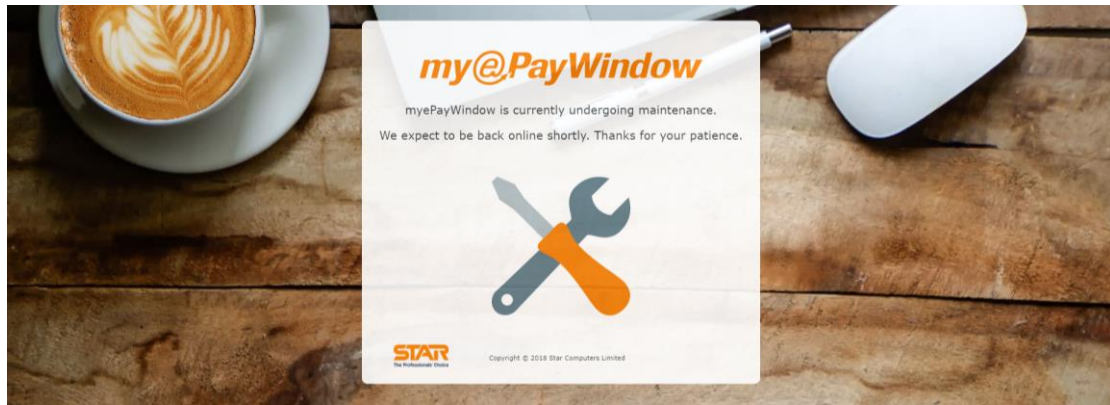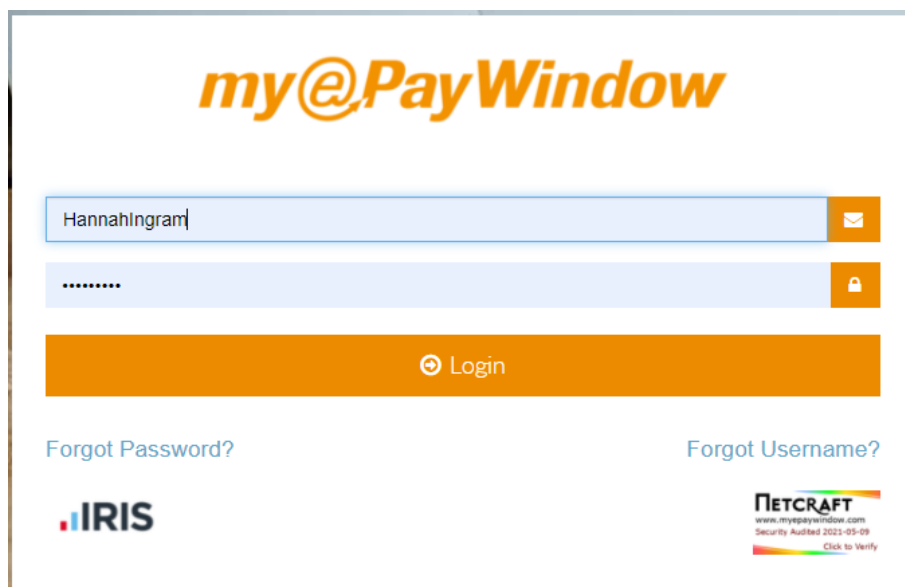
Re-setting Usernames and Passwords

Re-setting usernames and passwords is a fully automated process (i.e. they do not require Payroll Department or Employer user intervention although such resets can be initiated by Payroll department or Employer users if required). The term 'user' applies to any Portal user i.e. Employee, CIS Sub-contractor, Employer or Payroll department user. Any of these 'users' can initiate a reset directly from the Portal login page or once logged in to the portal via My Settings/ My Account options. Resetting Username and Passwords require the user to have access to their registered portal email account.

Automated password reset
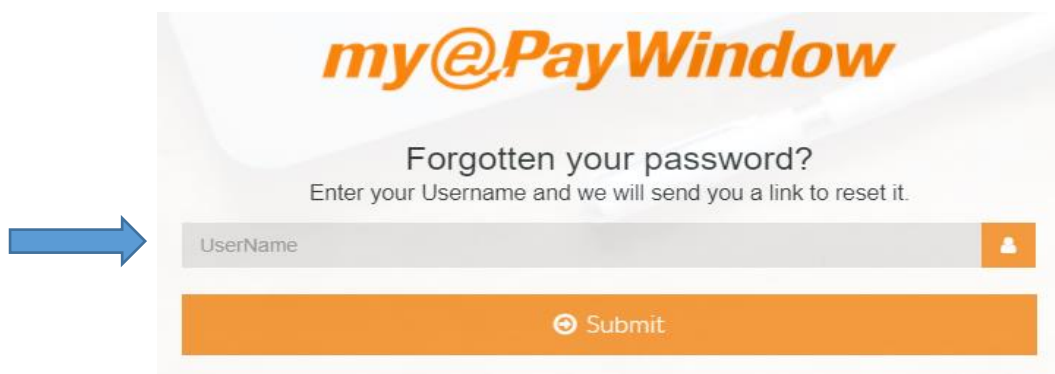
Step 1 – From Portal login page

From the login page the user can click on **Forgot Password?** To start the reset process.
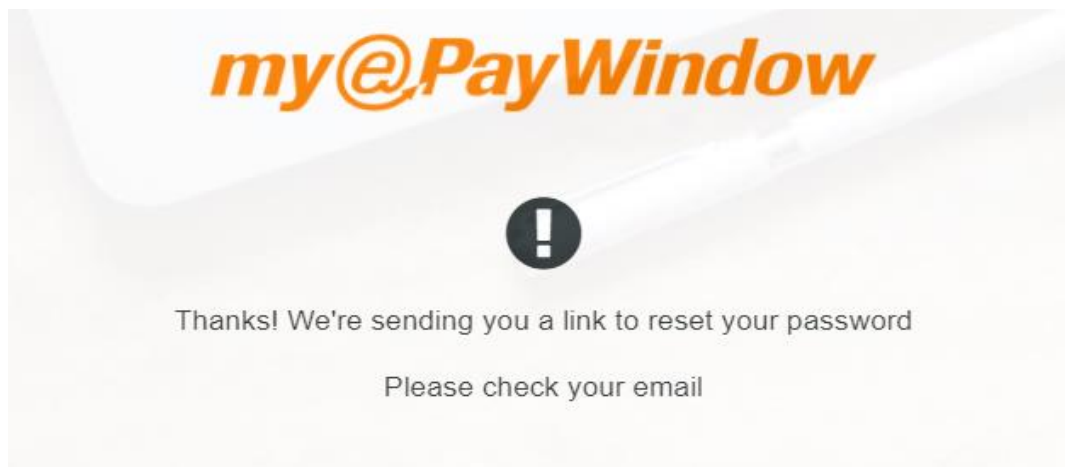

Step 2 – Request link

On clicking Forgot Password a new screen will appear requesting the user to enter the account Username. Enter the username and click **Submit**

Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

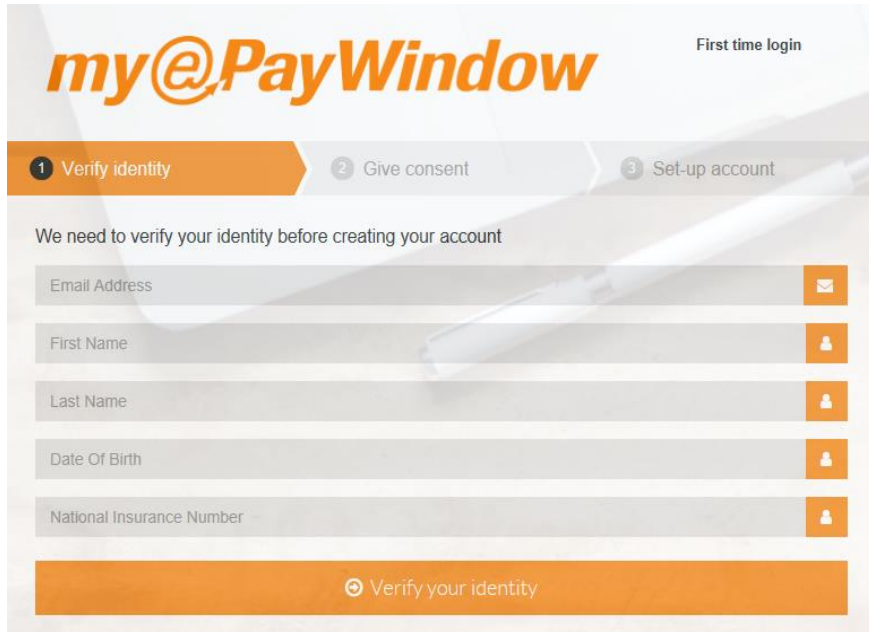

Step 4 – Receive reset email

The user will receive an email (to their payroll registered email address) with a link to complete the password reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.
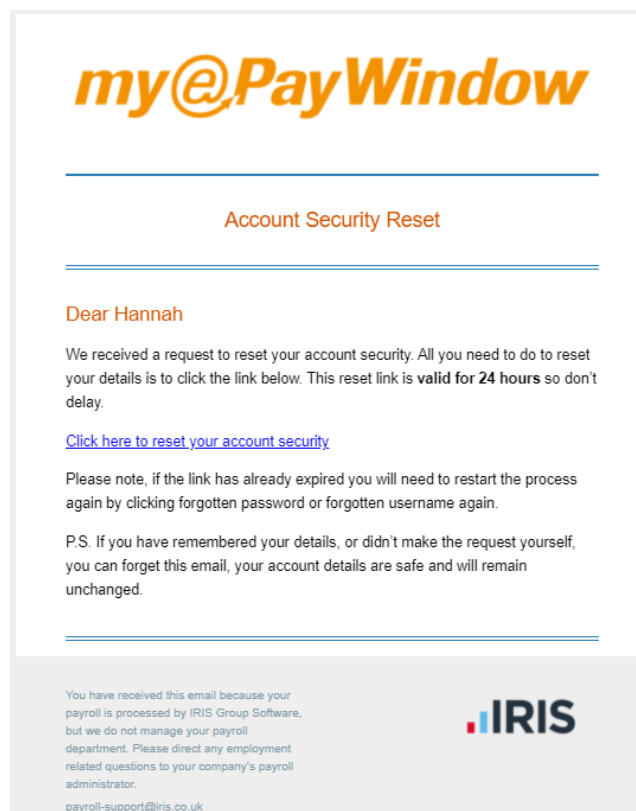
Step 5 – Verify identity

All fields must be completed correctly in order to complete the identity verification and to continue with the reset. The last field in verification will vary for each user persona as follows:

- Payroll department Staff user – Payroll password
- Employer user – secret word agreed with Payroll department
- Employee user – National Insurance number or Passport Number
- For CIS Contractors it is their Passport Number or details in the Passport Number field

Step 5a – Verification failure

After 5 failed attempts at identity verification an error message is displayed and the process will need to be restarted. This message will also be displayed if the reset link has expired.
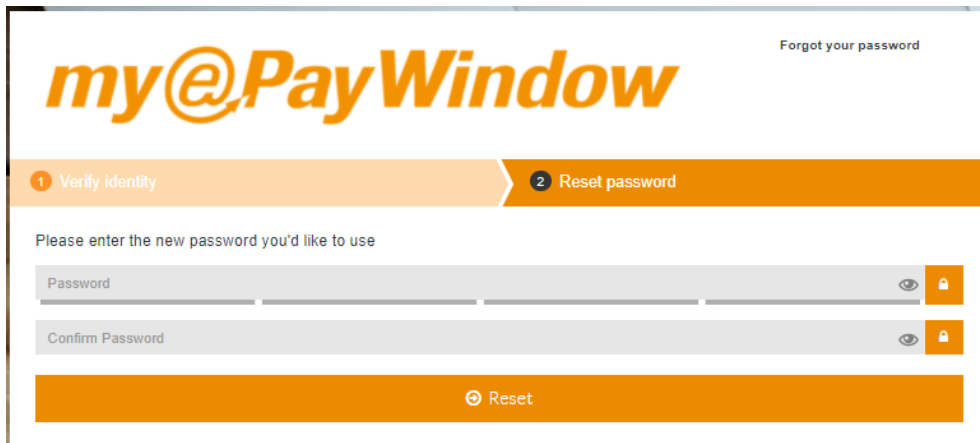
Step 6 – Enter new password

Once the user has verified identity correctly, they will be able to set a new password. The two password entry fields must match, there is no limit on the number of attempts.

Passwords will be validated and need to meet the following complexity rules;

- 1 upper case character
- 1 lower case character
- 1 special character
- 1 numeric character
- Contain between 8-20 characters

Step 7- Change Password confirmation
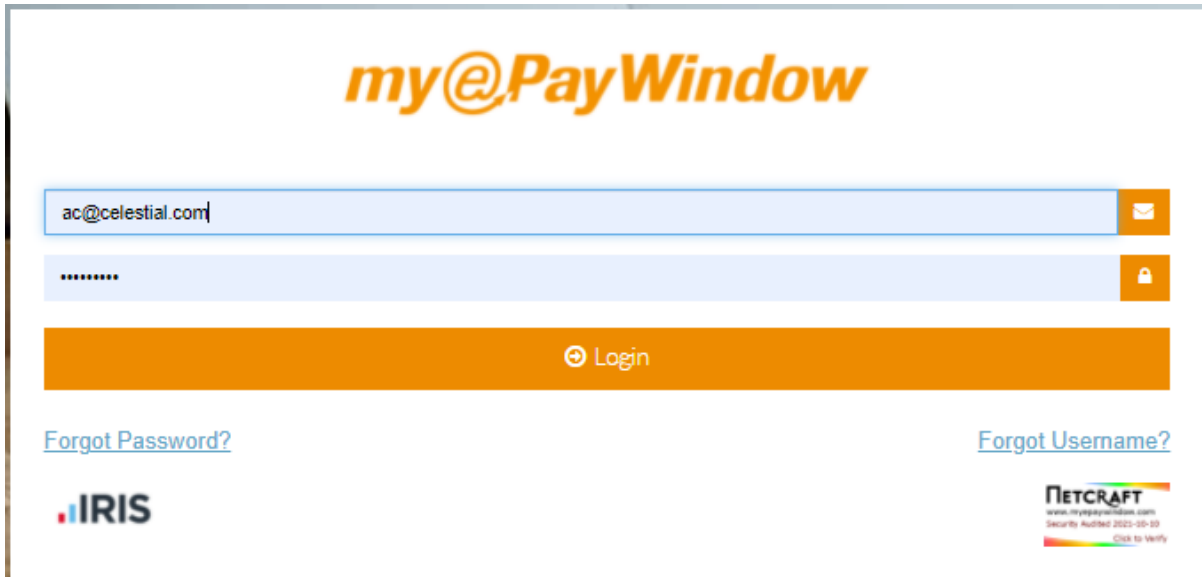
On clicking **Reset** the password change will be confirmed as successful and the user can continue to the login screen by clicking **Go to login**
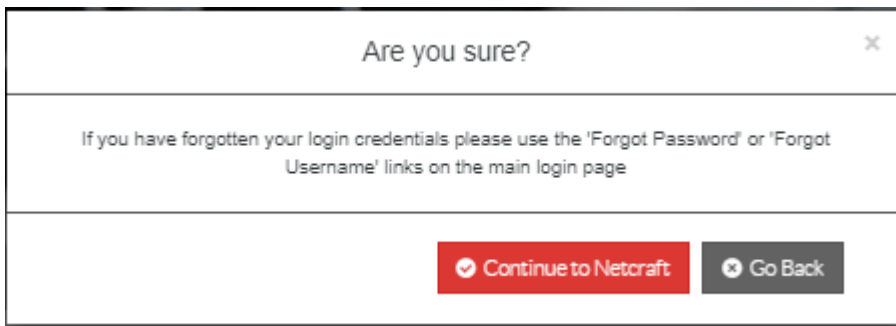
Automated username reset

Step 1 – From login

From the login page the user can click on **Forgot Username?** To start the reset process.

Note: If the Netcraft seal is clicked on the following message will display to prompt the user to click on Forgot Username or Forgot Password. If the user wishes to continue to Netcraft they can from this pop up.


Step 2 – Request link

On clicking Forgot Username a new screen will appear requesting the user to enter the email address associated with account Username. Enter the email address and click **Submit.**

Step 2a – Email address used with multiple Employers

If an email address is used for more than one Employer, for example, when an employee works for two employers and uses the same email address for both, a warning message will be displayed. In such situations the Employee (or Employer or Payroll department user) will be asked to contact the Employer directly for the employment concerned so that an email link to reset can be sent to them (this can be done by the Employer or Payroll department user from the Portal).
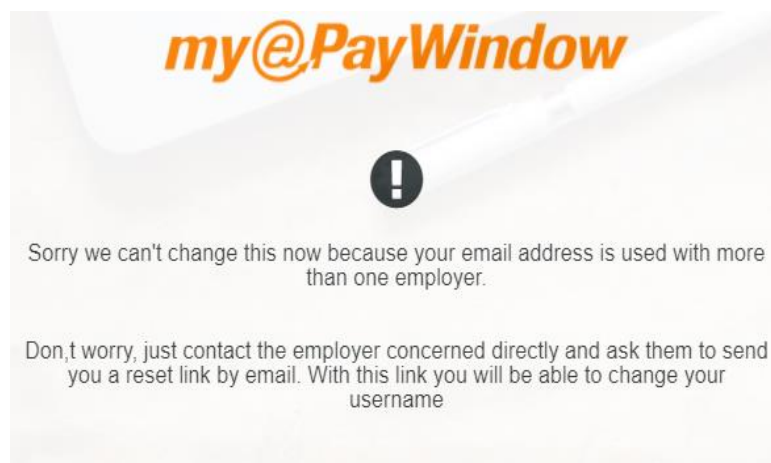
Step 3 – Confirmation of reset

Once the email has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the username reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.
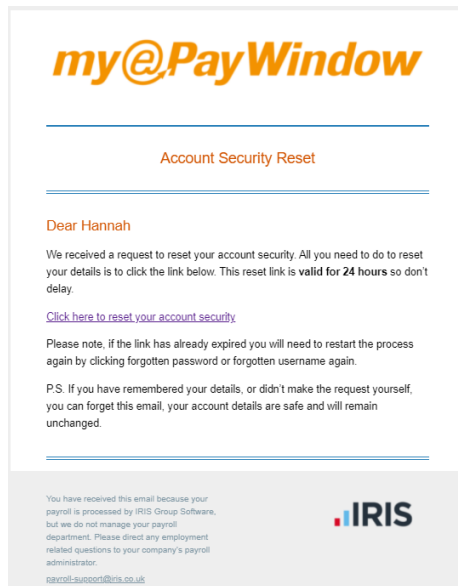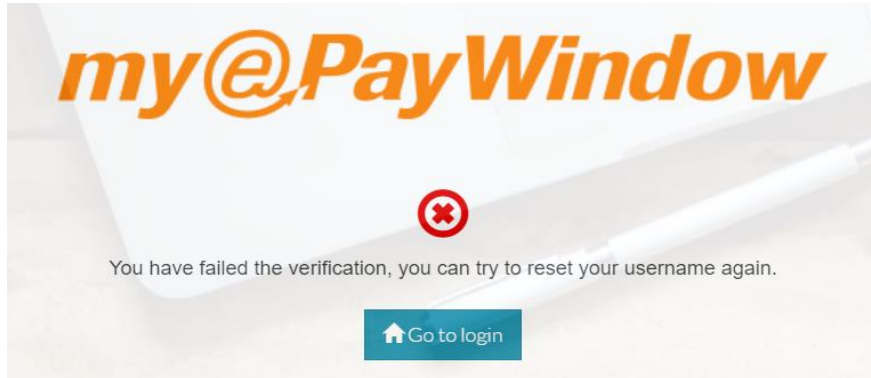

Step 5 – Verify identity

All fields must be completed correctly in order to verify identity and continue with the reset. The last field will vary for each persona as follows

- Payroll department Staff user – Payroll password
- Employer user – secret word
- Employee user – National Insurance number
- CIS Sub-Contractor – National Insurance Number or details in Passport Number field

Step 5a – Verification failure

After 5 failed attempts at verifying identity the user will get a warning page and the process will need to be restarted. This page will also be displayed if the reset link time has expired.

Step 6 – Enter new username

When the user has verified identity correctly they will be presented with a screen to enter a new username. The Username must be at least six characters in length and Users are prompted that an email address can be used as this may be more memorable (note: when an email address is used as a username it may not necessarily be the same as the registered Payroll email address for the user).

Step 7- Change Username confirmation
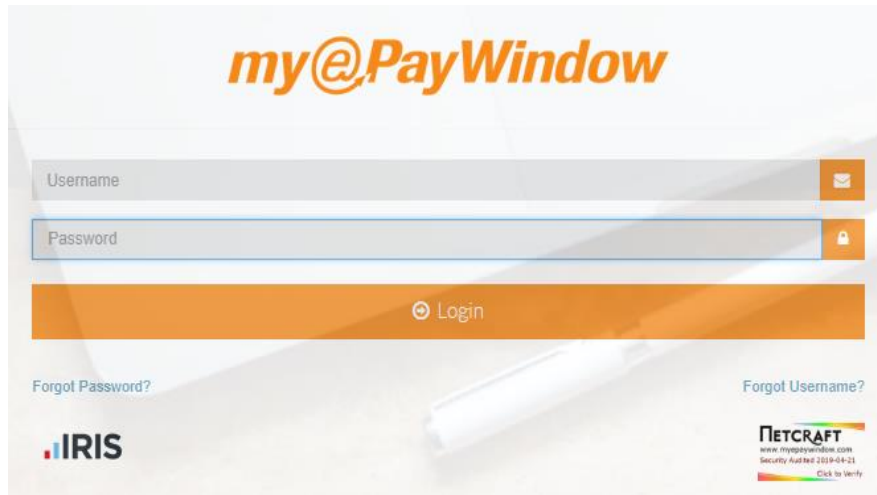
On clicking **Reset** the Username change will be confirmed as successful and the user can continue to the login screen by clicking **Go to login.**

Automated Memorable Word reset

Step 1 – From login page
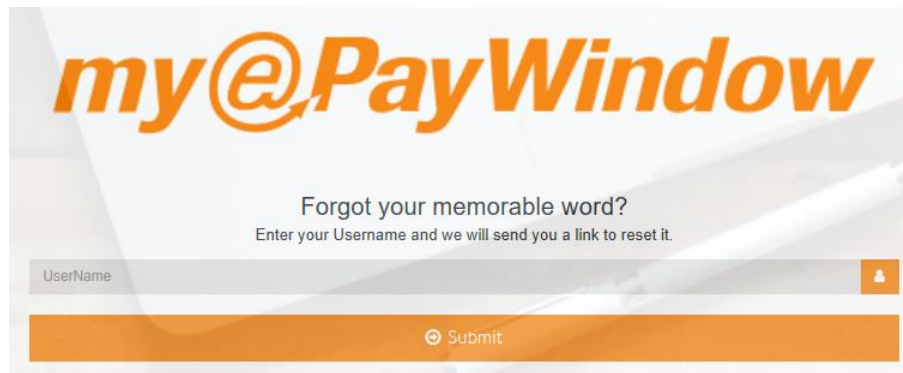
Complete the Username & Password as normal.

On the second page click on **Forgot Memorable Word?** To start the reset process.

Step 2 – Request link

On clicking Forgot Memorable word? a new screen will appear requesting the user to enter the username associated with the account. Enter the username and click **Submit.**

Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.
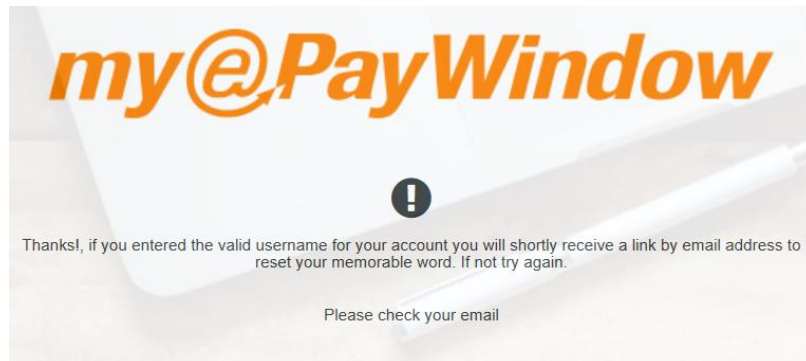
Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the memorable word reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.

Step 5 – Verify identity

All fields must be completed correctly in order to verify identity and continue with the reset.

Step 5a – Verification failure

After 5 failed attempts at verifying identity the user will get a warning page and the process will need to be restarted. This page will also be displayed if the reset link time has expired.
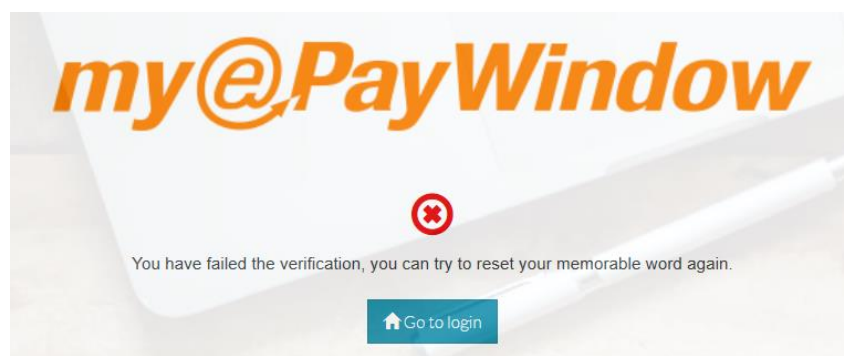
Step 6 – Enter new memorable word

When the user has verified identity correctly they will be presented with a screen to enter a new memorable word. The memorable word must be at least 6 – 12 characters in length.
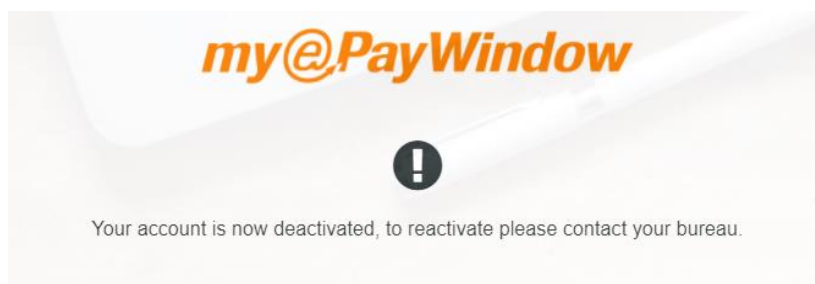
When consent is declined

Step 1 – Consent withdrawn

During Registration (step 2) or after registration, a user can withdraw consent. This means they no longer agree to the Portal Terms and Conditions and privacy. Within the Portal, consent can be withdrawn from **My Settings**, **Privacy and Terms**, by scrolling to the bottom of the page and clicking **'I do not agree'**. A confirmation message is displayed and the user must confirm their required action.
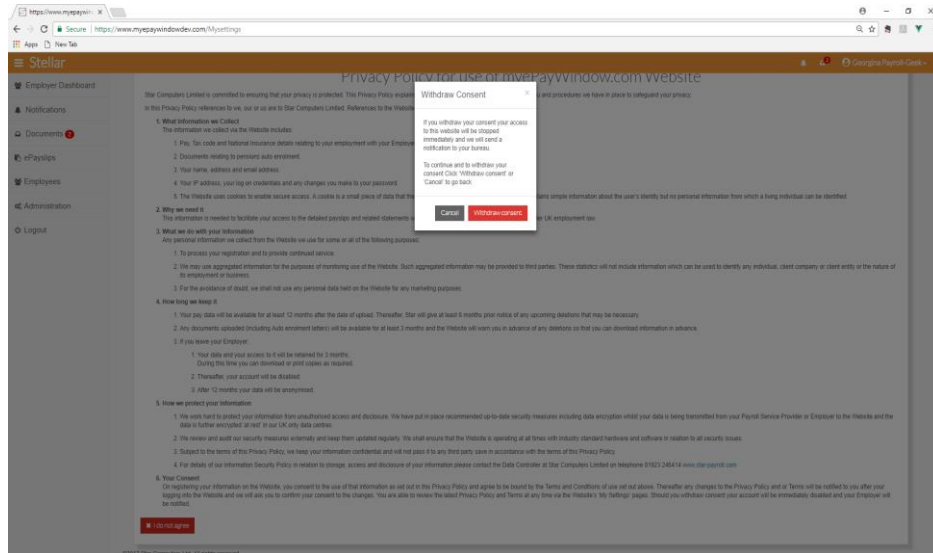
Step 2 – Account deactivation

On withdrawing consent, the Portal account is automatically deactivated and the account is disabled. A notification is sent to the Employer and Payroll department user. To gain access to the account the Employee user will have to contact either Employer or Payroll department to be re-invited.

Step 3 – Attempted Login after consent withdrawal

If the user attempts to login after consent is declined, a message will display stating 'username or password is incorrect'. The ability to reset the password or username will be disabled for the user and the system will not send reset security emails.
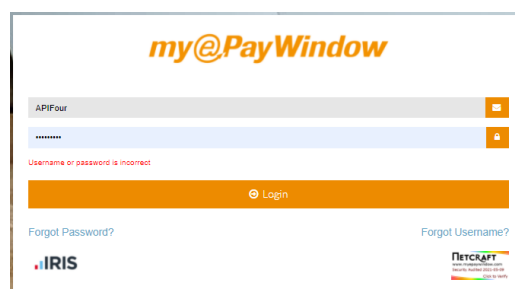
Using the Portal

myePayWindow user interface

The diagram below describes the main elements of the Portal site. The layout and options is essentially the same for all Portal users, the main difference being the options available in the 'Left-menu' and the contents of the home-dashboard page.
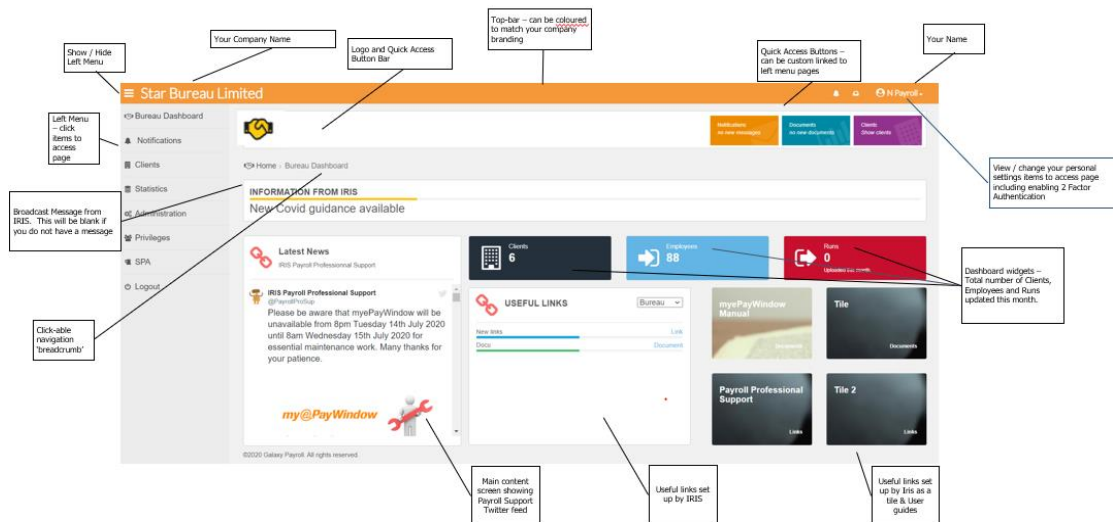
login to the Portal Payroll department 'Staff Users' arrive at their Home-Dashboard page from where they can access various menu options and Portal features:

- *Home-Dashboard* – The home screen for the user, this will be enhanced in later releases for Payroll department users to be able to display various 'dashboard widgets' providing data insights regarding the user's Payroll activity. You will see displayed on the Dashboard the Payroll Support Twitter feed, giving updates from support and any issues with HMRC.

- *Notifications* – a list of various notifications from other Portal users (Employer Users)

- *Documents* – This area is for future use for Payroll department documentation

- *Employers* – This is a list of the Employers showing Employees and key contact.

- *Administration* – This is for Administration of the Portal for the Payroll department and Payroll department users and includes enforcing 2 Step Authentication or 2 Factor Authentication for your Users.

- Privileges – This is where you can create Client Groups to add your employers to, create roles, set custom Privileges and assign Staff Users.

- *My Settings* – This is where the user's personal Portal settings can be viewed and changed. 2SA can be enabled here at a user level if it hasn't been enforced at a higher level through Administration.

Notifications

The Notifications page shows various Notifications that are sent to the individual Payroll department user. These are a result of actions carried out in Payroll Professional or on the Portal. For the Employer and Employees, Notifications are as a result of Payroll Professional processing completed by a Payroll department user.

To manage your notifications, you can mark them individually or collectively as 'read' and remove them from the 'current' view by archiving them. Use the **Current/Archive selector** at the top right-hand side of the notifications list to switch views.

As a Payroll department user you receive individual Notifications after the following events:

- An Employer user has uploaded a document for you
- An Employer user has declined consent to use the Portal either during or after Portal registration
- A Payroll department user has declined consent to use the Portal either during or after Portal registration
- Portal terms and conditions have been updated – myePayWindow usage terms have changed and you will need to confirm your agreement.

As a Payroll department you can optionally choose to receive an email notification to a central Payroll department mail account e.g. Payroll@mybureau.com when any Employer uploads a document to the Portal. This can provide central oversight on all inbound client communication and cater for Staff member absences. See **Administration** - **Details**

As a Payroll department you send the following notifications to your Employer users:

- [1]Payslips/CIS Statements are ready for publishing – when Payslips/Statements are sent to the portal from Payroll with a future publish date. Employees cannot see Payslips/Statements yet but you can review now in advance of the publish date
- [1]Payslips/Statements have been published – On the day when Employers/Employees/CIS sub-contractors are able to access their payslips/statements

- [1] [YearYYYY] P60s have been published for [X] Employees – when P60s are uploaded for X number of Employees from Payroll
- [1] P45s have been published– when P45s are uploaded from Payroll
- You have downloaded a document sent to you by an Employer user
- When a new Payroll report / document /Macro or group report is sent to an Employer user from Payroll
- When you delete a document from the Employer's documents area on the portal – Most likely if you upload a document-report in error or supersede it
- When AE letters have been uploaded for [X] Employees from payroll – where X is the number applicable

Notes:

[1] In the current Portal version, these notifications are only sent to the default Employer User, you or the Employer user can define this user via **Administration - Details**

Archived notifications are automatically deleted by portal housekeeping routines 3 months after their 'due' date' or the 'received date' when there is no notification due date.

You can choose via **My Settings** if you want to receive an email reminder summary for new notifications received in the past hour.

Employer users get an advance warning notification that a document will be auto-deleted by the Portal in 10 days (documents are held for 3 months maximum from the date of upload) this servers as a reminder for them to download a copy if they want to retain a copy
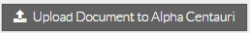
Notifications have the following features:

- A 'Type' – either Pay run data, Starters and leavers, Other, Registration, Information
- Received date – the date the Notification is received
- A 'State' – High (needs attention), Moderate, or Low (most are High by default)
- Due date (Xd) – For documents sent by Employers, the accompanying notification will show the pay date for which the document applies and how many days (Xd) remain between now until this date (this will dynamically update)
- Actions – click anywhere on a notification, or on the '+' button to see the actions available for the individual notification – The notification actions will vary by notification type:
  - Mark as Read/Unread – this decrements/increments the Icon 'badge' 🔴 in the menu and top bar 🔔 and bolds/ un-bolds the entry in the listing
  - Archive / Un-Archive – once read a notification can be moved to the archive list
  - Download – for notifications that relate to documents

- Multi-select Actions – by clicking the select tick-box ☐ you can select multiple notifications and apply actions from the actions shown at the footer of the notifications listing e.g. Archive or Mark as Read

Documents

Payroll Department user can send documents to other users by drilling down to the Employer and selecting an Employer User (via Administration) or Employee User (via Employees) Select the document action from the data gird.
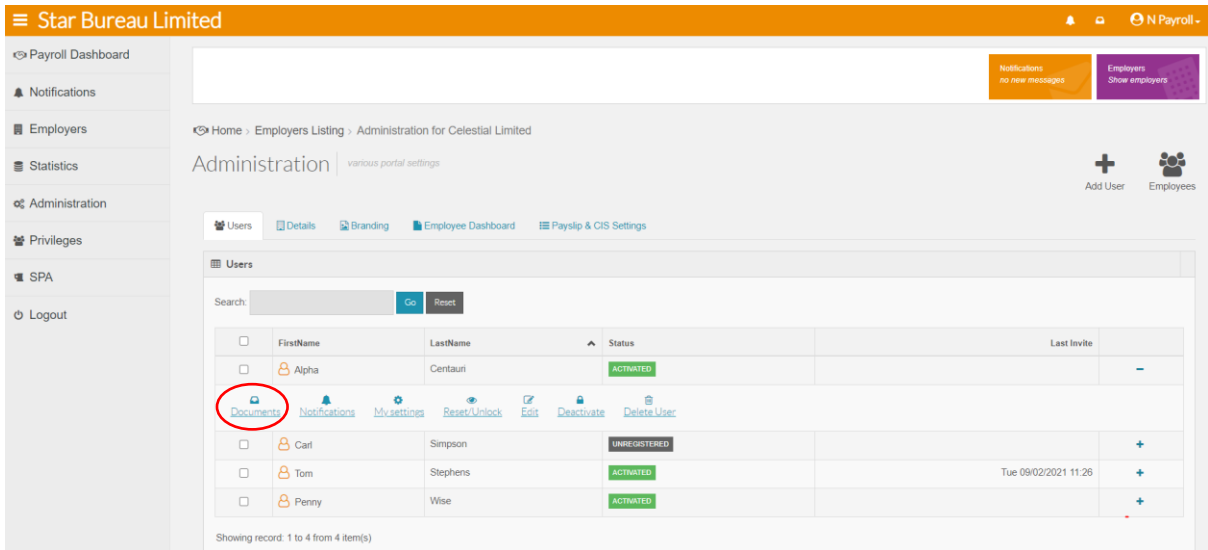
Select ![Upload Document to Alpha Centauri] to upload a document to this user
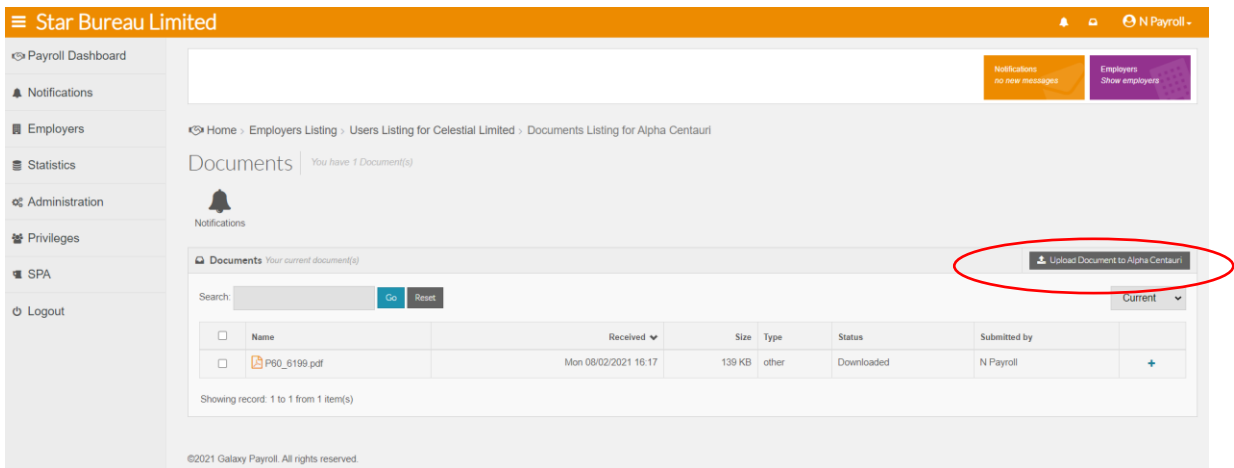
Select the type of report and add a note if necessary and choose the file you wish to upload. **Upload**

The User will receive a notification and see the document under the documents section from the left menu.

Employers

The Employer page shows a list of the Payroll department's Employers added to the Portal. By clicking a Client in the list 'actions' are displayed that will allow you to 'drill' further to see the Employees, ePayslips, CIS Statements and Portal Administration options associated with this Employer. Use these actions to check data uploaded for Employees, CIS Sub-Contractors, see documents, ePayslips & statements uploaded by you to the Employer (and delete if needed) and to Deactivate, or send reset password or reset username emails as required to Employer users and Employee users.

- ▪ Employees – go to the Employees listing for the Employer to view Employee Portal status, view Payslips/ CIS Statements, Delete Employee payslips/statements, Documents, Notifications, My Settings, Invite/Re-invite, reset Password/username, deactivate
- ▪ ePayslips – View Payslips/CIS Statements by Period – Delete Payslips/Statements by Pay Period at Payroll department level
- ▪ Administration – Area contains Employer user listing, Employer Details, Branding; you can now brand the site for an Employer if required and set the online Payslip/CIS Statement Settings. You can also Enforce 2 Step Authentication for your Employer, Employee and CIS users.
- ▪ Privileges – Create Employee Privilege groups based on Branch, Department and Cost Centre (Analysis Groups) within Payroll Professional, Add Roles and assign users to each Employee Group to limit Employer users to areas of the Portal E.g. Administration

Employers - Employees

When you click the Employees action on Client listing you see the Employee listing page below. Click anywhere on an Employee user entry, or on the '+' button to see the actions available for the individual Employee user – the actions available will vary depending upon the user status. Multi-select actions are also available.

Employees that have never activated their account:
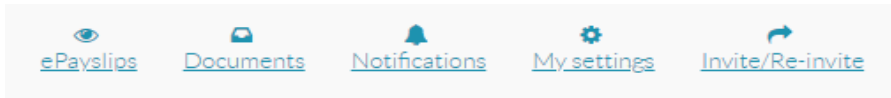
Additional options for Employees that have activated:

Use the right hand side drop down to view leavers or CIS sub-contractors.

Employers - Administration

Notes: Each Employer user for the same Company all will appear in this list.
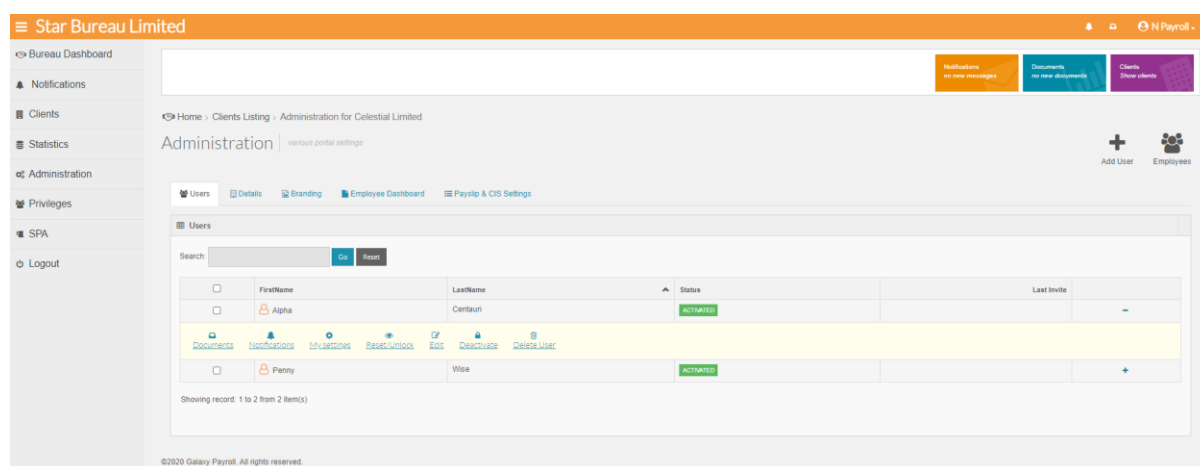
Click anywhere on an Employer user entry, or on the '+' button to see the actions available for the individual Employer user – The actions available will vary depending upon the user status:

- Documents – view the Employer user's Documents and download as required
- Notifications – view the Employer user's Notifications
- My Settings – view individual user settings My Key Info page
- Reset/Unlock – Reset Password or username and send a reset email to the Employer user. If the user has been locked out you can reactivate here.
- Deactivate – Deactivate the Employer user's account

Employers - Administration - Users - Documents

When you click the Documents on an Employer user you see the Employer user's documents page below.
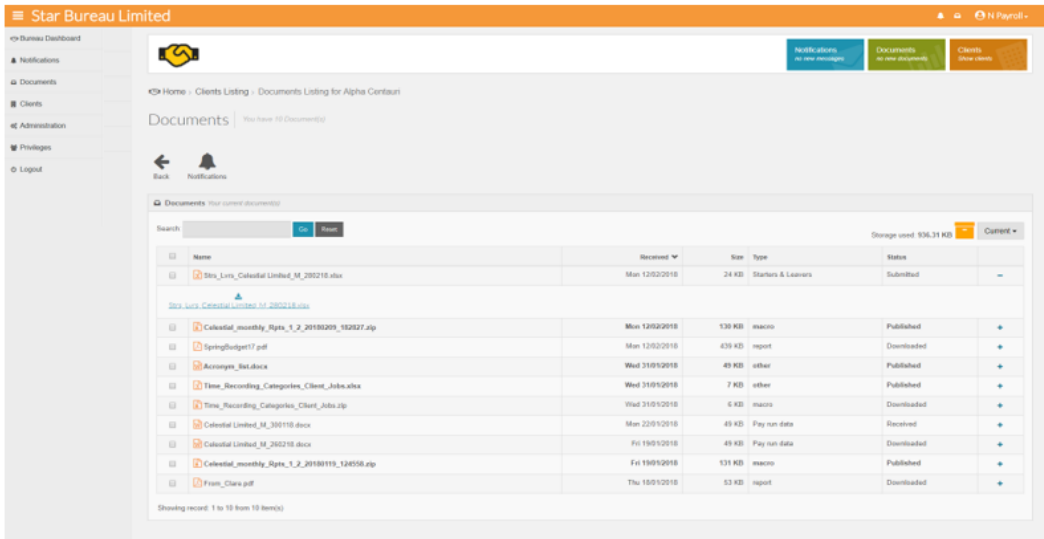
Documents can be deleted or downloaded by the Payroll department user, if a document is deleted the employer user will receive a notification this has been done.

Employers - Administration – Details

The Details tab shows the client details as held in Payroll Professional, the Payroll department information, enforcing 2 Step Authentication for your Employer, Employee and CIS users, Default contact for notifications and In-house Payroll setting.
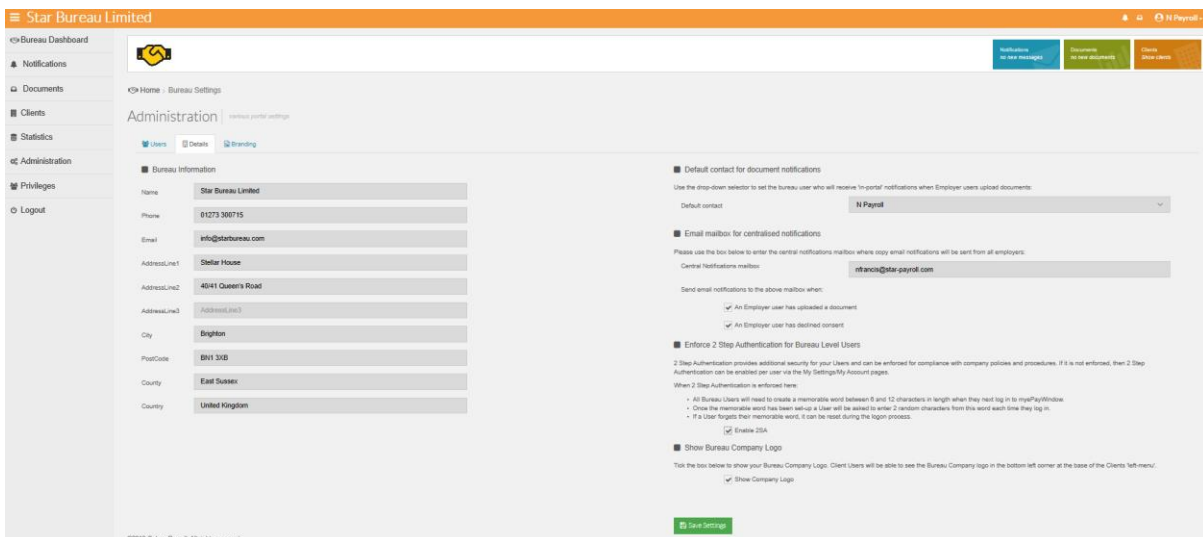
If 2SA is enforced here all Employer, Employee & CIS users will be asked to create a memorable word. See 2 Step Authentication section.

Employers - Administration - Details - Default contact

The Employer User can select from the list of Employer users who should be the default contact for payroll upload and declined consent notifications (see Notifications)

Note: This Drop down shows only activated Employer users.

Employers - Administration - Details – In-house Payroll

For the Payroll department user the In-house Payroll setting allows the Payroll department own 'staff payroll' to be added to the Portal. Using this setting (see below) the 'Payroll department-Employer' is hidden from the client listing for all payroll department staff users.

To administer this staff payroll your main payroll department user needs to set up a specific 'Internal Employer user' account to access this payroll (this will need a separate username, password and ideally email address).

This payroll can now be treated like any other Employer payroll and Employees (Staff users) will need to be invited and create their own 'Employee' user accounts. Note: They will need use a separate username and password for this account. And, they should use a personal email address or a different email address than that used for their Payroll department Staff Portal account.

Un-hiding the payroll
The only way the in-house payroll can be reinstated so that it is visible in the standard Payroll department employer listing is by logging in as the employer user and on the Details tab, unticking the In-house Payroll setting.

Note: The In-house Payroll setting is only available-visible to the 'Internal Employer User' if this setting has been ticked before-hand by a Payroll department User (via their Payroll department Portal access).

Warning: be careful not to use this setting on normal client payrolls as you will not be able to unhide the payroll without the Employer's help.

Please refer to the Privileges section to see how it is also possible to restrict access to a specific Payroll using Privileges. Privileges have no impact on the 'In house' payroll procedure described above.

Employers - Administration - Branding

Payroll department staff can view or set Company Logo and Colour Theme for employers in the Branding tab.
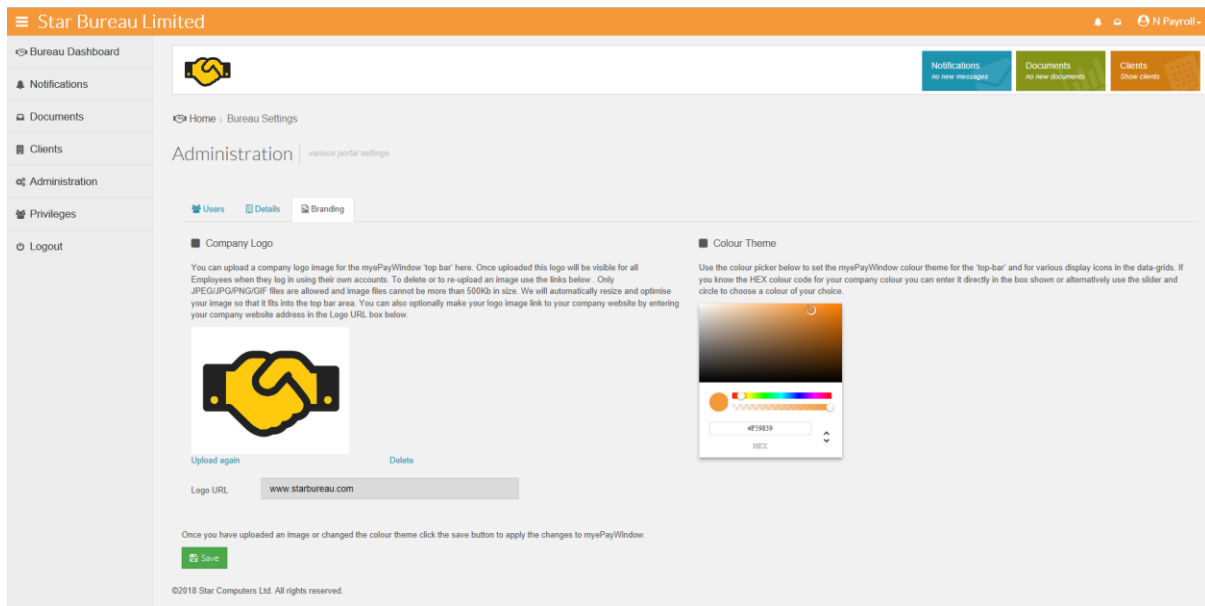
Note: See **Administration/Details** – Show Payroll department Logo above for setting the Payroll department Logo on their Employers Left Menu.

Employers - Administration – Employee Dashboard

How to set up an Employer-to-Employee Broadcast Message (Employer User)

Navigate to **Administration/Employee Dashboard**. Use the date picker to pick a date that you would like the message to show from and enter the message. Click save.   This broadcast message will show on all employee dashboards. One message is available at a time. If you wish to remove the message you will need to click on clear and the message will no longer appear on the Employee dashboard.
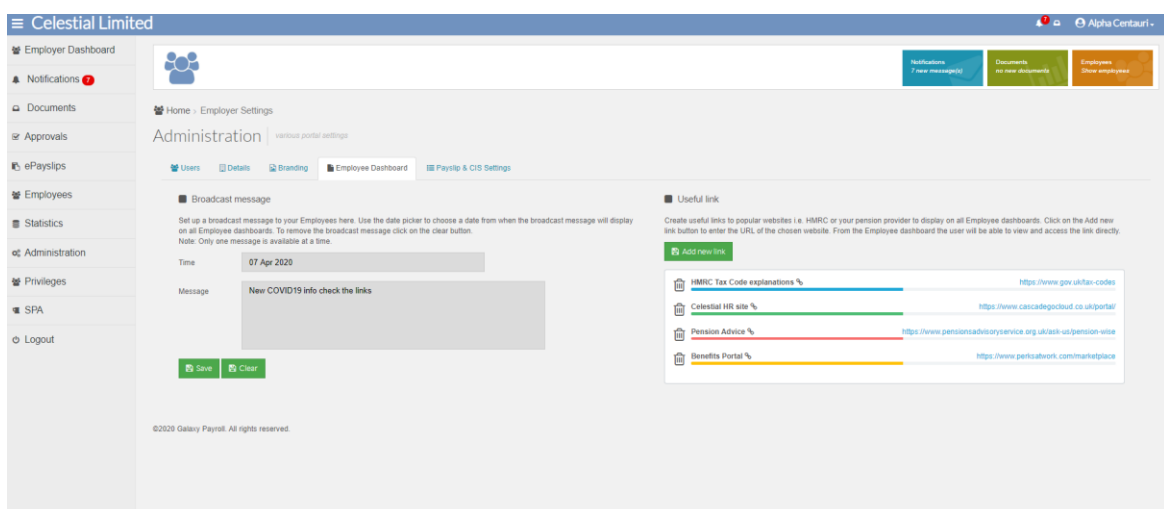
The broadcast message will display as below on the Employee Dashboard:-
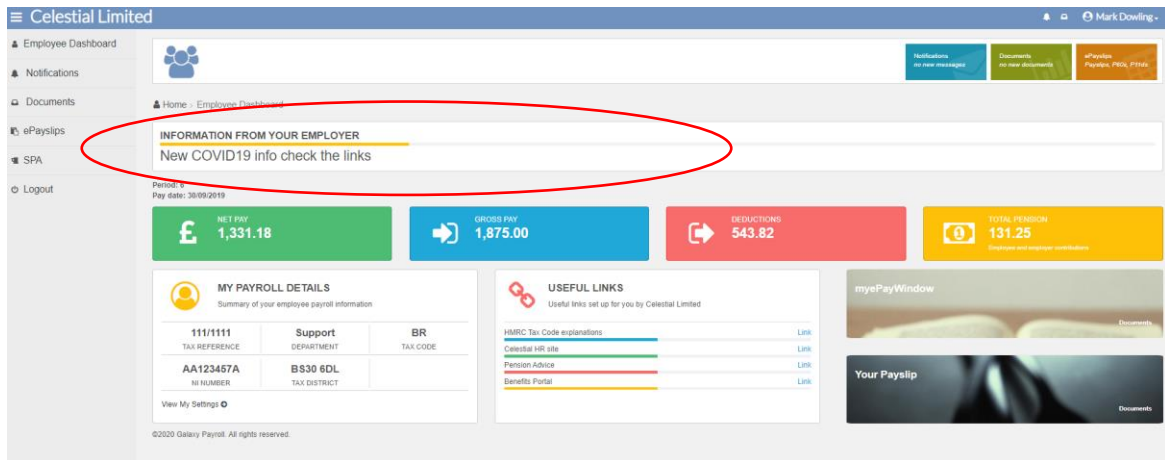
How to set up Employer-to-Employee Useful Links (Employer User)

Navigate to **Administration/Employee Dashboard.** Click on the add new link button

1. Enter the Title of the useful link e.g. HMRC
2. Enter the URL of the website or Document
3. Choose whether you would like the website shown as a link or a tile on the dashboard

Click on Save new link

The useful link has been created on the Employee dashboard. You can create as many useful links as you like, however we recommend that create 5-8 Useful links and two tiles on the dashboard.
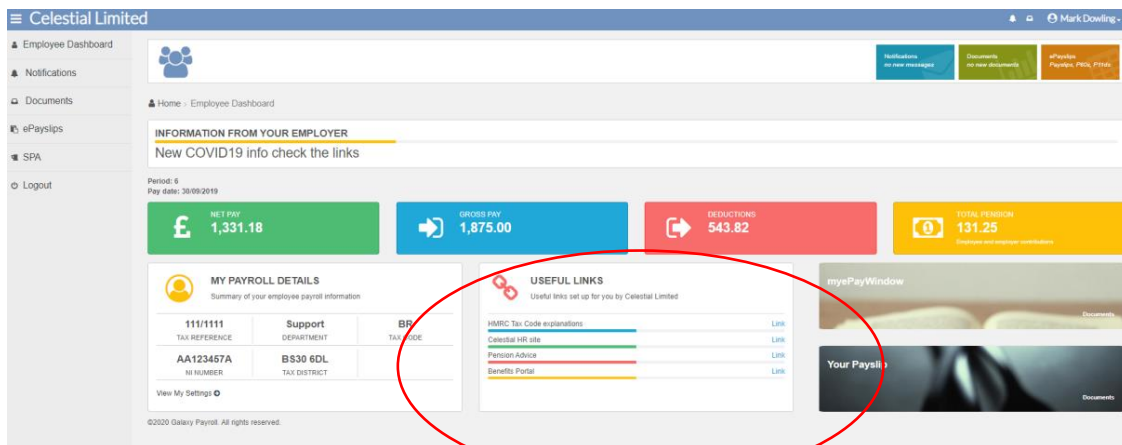
Below shows an example of a useful link as a tile.
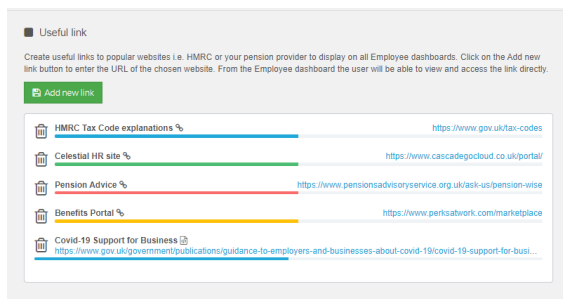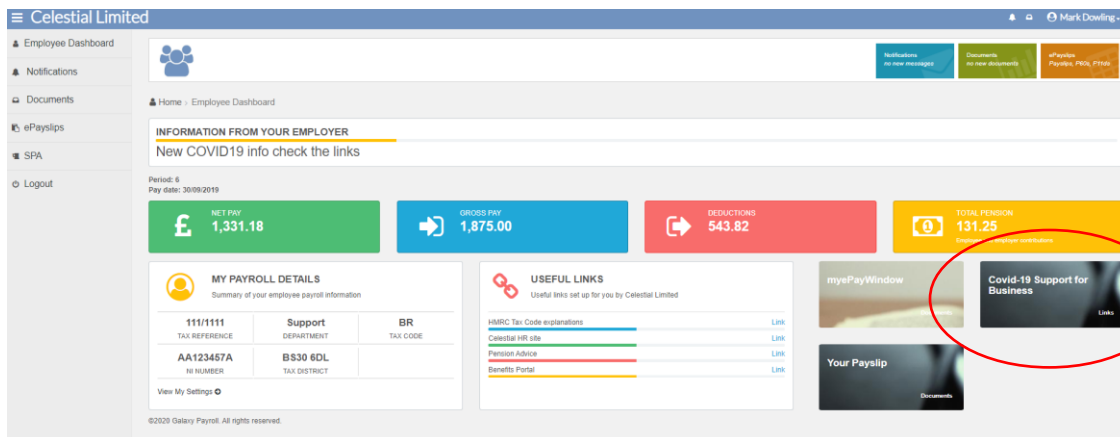
To delete a useful link, navigate to **Administration/Employee Dashboard** and click on the bin icon. This will remove the link from the Employee dashboard.

How to switch the Useful links view from Employer to Employee
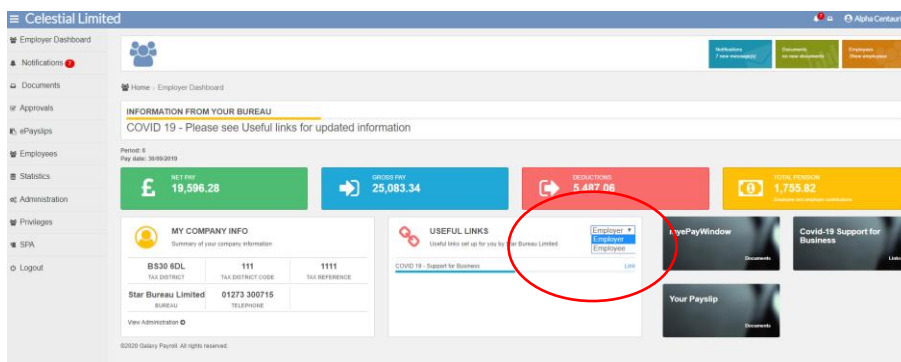
From the **Employer dashboard** you can switch the view from your Employer Useful links (set up by the Payroll department) and the view from the Employee useful links (set up by the employer). Use the dropdown box to choose the view.

Employers - Administration - Payslip Settings

Payroll department staff can view or set the Payslip Logo, Payslip on-line layout template (2 templates are available) and Payslip data elements for employers.

CIS Statement data can be set to include a pay component breakdown on page 2 of the CIS statement.

≡ Celestial Limited

- 👥 Employer Dashboard
- 🔔 Notifications ②
- 🖶 Documents
- ⮕ ePayslips
- 👥 Employees
- ⚙ Administration
- 👥 Privileges
- ⏻ Logout

Administration | *various portal settings*

👥 Users   🗏 Details   🖼 Branding   ☰ Payslip & CIS Settings

■ Payslip Logo

Please select the layout of the myePayWindow payslip that you would like to use for your employees, and upload a logo for use in the stationary.

Payslips template:

| template 2 ▼ |

Upload images:

Upload again   Delete

■ Payslip Data

Now indicate which data attributes should be shown in the payslip.

✔ Show Pound Sign	✔ Show Company name
✔ Show TaxCode	☐ Show Address
✔ Show NI Letter	☐ Show Holiday Pay
✔ Show NI Number	☐ Show Holiday Days
✔ Show Tax District	☐ Show Prev Emp
✔ Show Tax Reference	☐ Show Dept
✔ Show Pay By	☐ Show Branch
✔ Show Er NITP	☐ Show CostCentre
✔ Show Er NIYTD	☐ Show Run Group
✔ Show Er PensionTP	☐ Show PayGrade
✔ Show Er PensionYTD	☐ Show Annual Salary
✔ Show Total Taxable PayTD	☐ Show Standard Hours

■ CIS Statement Data

Now indicate which data attributes should be shown in the CIS Statement.

✔ Show Pay Component

🖫 Save

Employers – Privileges (Employer User Level)

The Privileges page provides access to the following Employer functions:

- Employee Groups tab - Create New Employee Group(s) and add Employees based on the Analysis group in Payroll Professional (Branch, Cost Centre or Department).
- Roles-privileges tab - set-up new access Role(s) with appropriate privileges
- Groups-Roles-Users tab - add the required Role(s) to each Employee Group(s) and add the Employer Users to each Role (remove them from the Full Access Role as required).

Notes: Depending on the Role an Employer User belongs to, access to the Privileges page may be restricted or unavailable.
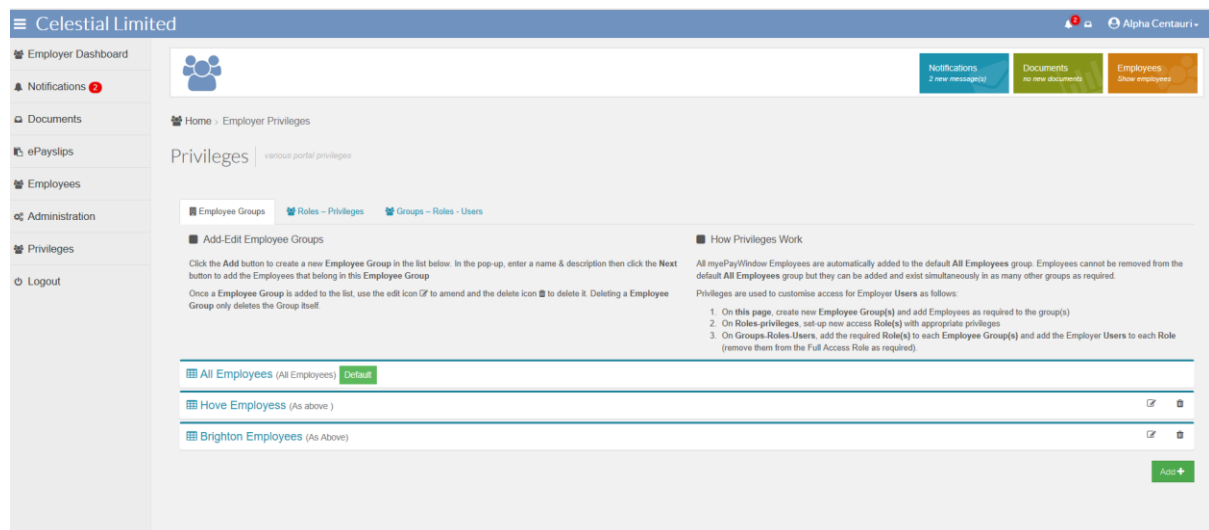
Employer Level Privileges can also be accessed/set through the Employer User Portal.

You do not need to use Employer Privileges but please read this section carefully to ensure how Privileges impact myePayWindow operation.
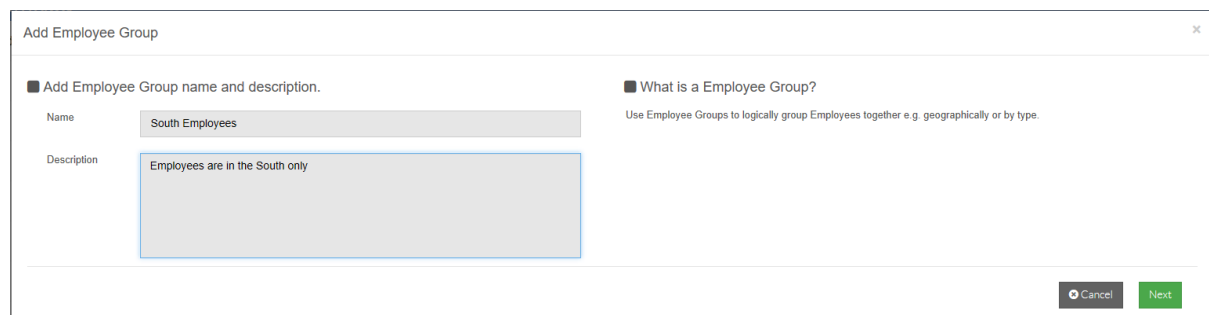
Step 1 Add Employee Group

From the Privileges - Employee Groups page, you can create a logical Employee group and add Employees to it.

Note: All myePayWindow Employees are automatically added to the default All Employees group. Employees cannot be removed from the default All Employees group but they can be added and exist simultaneously in as many other groups as required.

Click the Add button at the bottom of the Employee Group listing to Add a **Group** (to edit or delete a Group use the Icons per Group in the listing).

You must enter an Employee Group Name (100 Characters) and provide a description (500 Characters).

Add Employees (by analysis group) to the Employee Group(s)

Use the alpha/numeric filters or use the search box, then click the Branch, Cost Centre or Department name(s) (to highlight in green) to add to the Employee group. You can Click the 'Yes' button in the select All Data section to add All Employees to the group.

Note: When you choose 'Select All Data' a group entry called 'All Data' is automatically included in the Employee Members section and not individual Employees names.

To remove individual Employees from the Group, click the waste-bin Icon in the Employee Members section of the screen.

When you have chosen all the Employees for this Group, Click Save to apply.

Step 2 Create Roles – Privileges

On the Privileges - Role–privileges page create a **Role** and add **Privileges** to it:
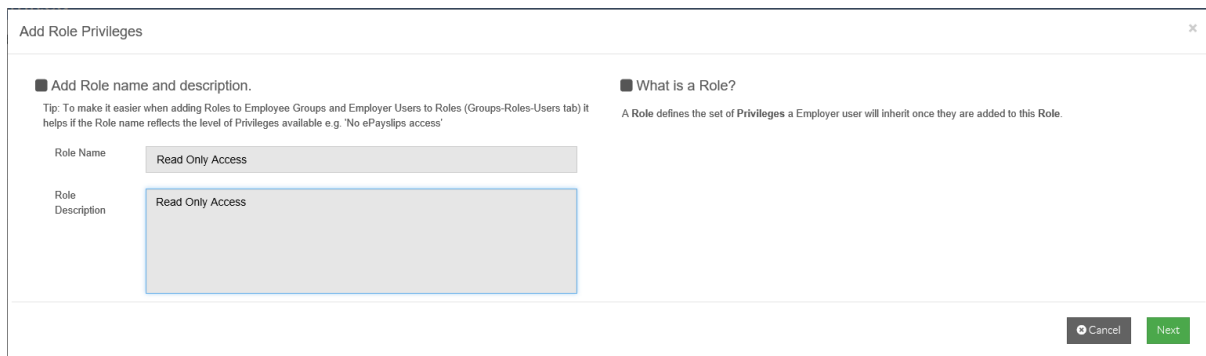
Notes: Existing Employer Users are automatically added to the default Full Access Role that has full access privileges to the default All Employees group.

When you add new Employer Users they will have no access until they are added to one or more Roles as defined here.

You can only delete a Role if it is not added to an Employee Group.

Click the Add button at the bottom of the Roles listing to Add a **Role** (to edit or delete a role use the Icons per Role in the listing).

You must enter a Role Name (100 Characters) and provide a description (500 Characters).

Click next to Add Role Privileges...

Add Role **Privileges**

Role Privileges allow different levels of access to myePayWindow menus and the actions available within them. A main menu item can be **Allowed** or alternatively **Custom** access can be used to further refine access **(Full Access, No Access, Read only)**. For example, using the selectors on the left, a **Role** can be set up to **Allow** access to the Employees menu but with **Read only** access to the Employees 'action' but with '**No access**' to the ePayslips action. Note: setting the ePayslips action to '**No access**' will override any higher level '**Full Access**' which would otherwise allow Employees payslips to be viewed.

Choose the access levels using the selectors below, click save to apply.

Step 3 – Add Roles and users to Employee Groups

The final step is to add **Roles** to **Employee Groups** and Employer **Users** to the Roles as required.

Notes: A Employer User must be added to one or more Roles in each Employee Group they need access to.

When you add a new Employer User they will have no access until they are added to one or more Roles in the Employee Groups.

Existing Employer Users are automatically added to the default Full Access Role for the Default All Employees group. Remember to remove Employer Users from this Default Role as this will override any other Role and Privileges to which they are added.

For the required Employee Group in the listing click the Add Role button.
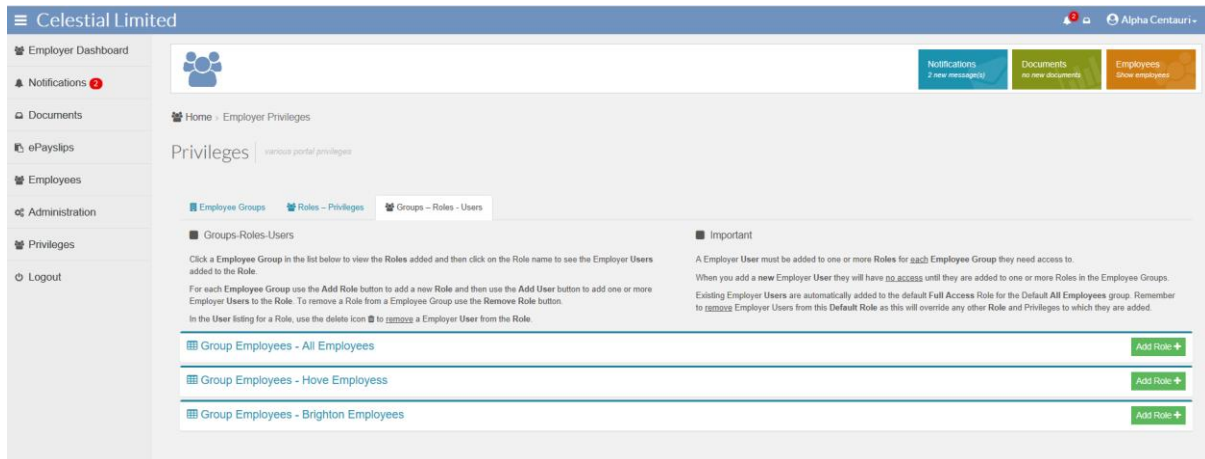
Select the roles you would like to add to the Employee Group. Click on Add.
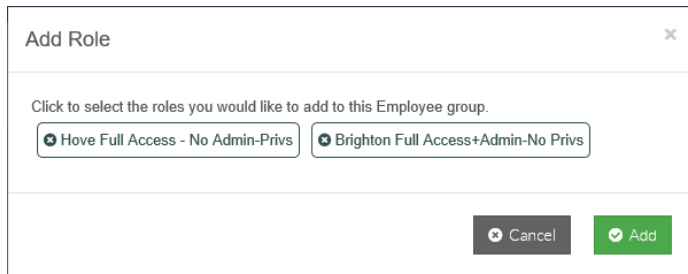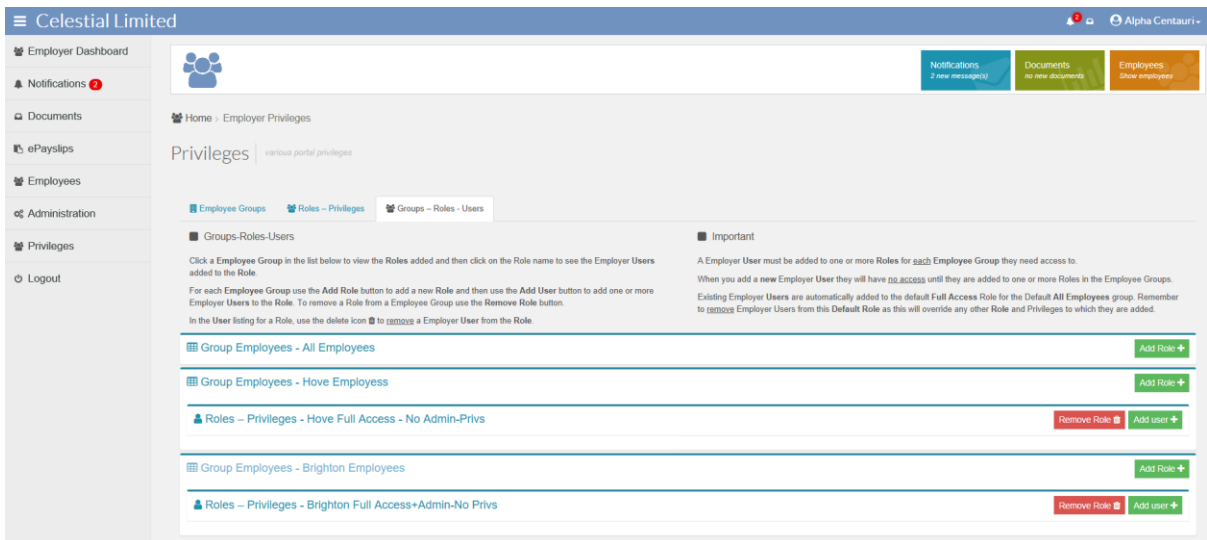
Click on the Add User button or the Remove Role Button to delete the Role.

Select the users you would like to add to the Role. Click on Add.
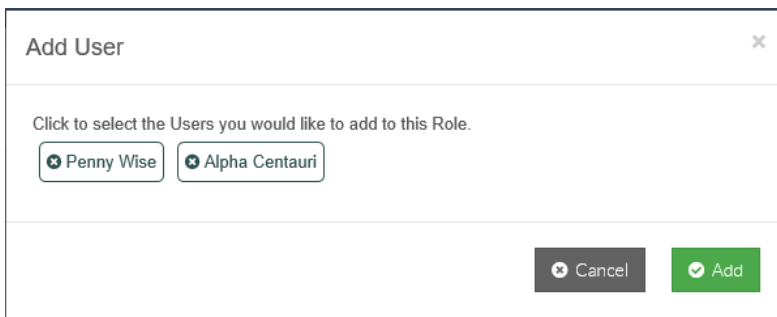
Use the waste-bin icon to delete users from the role.
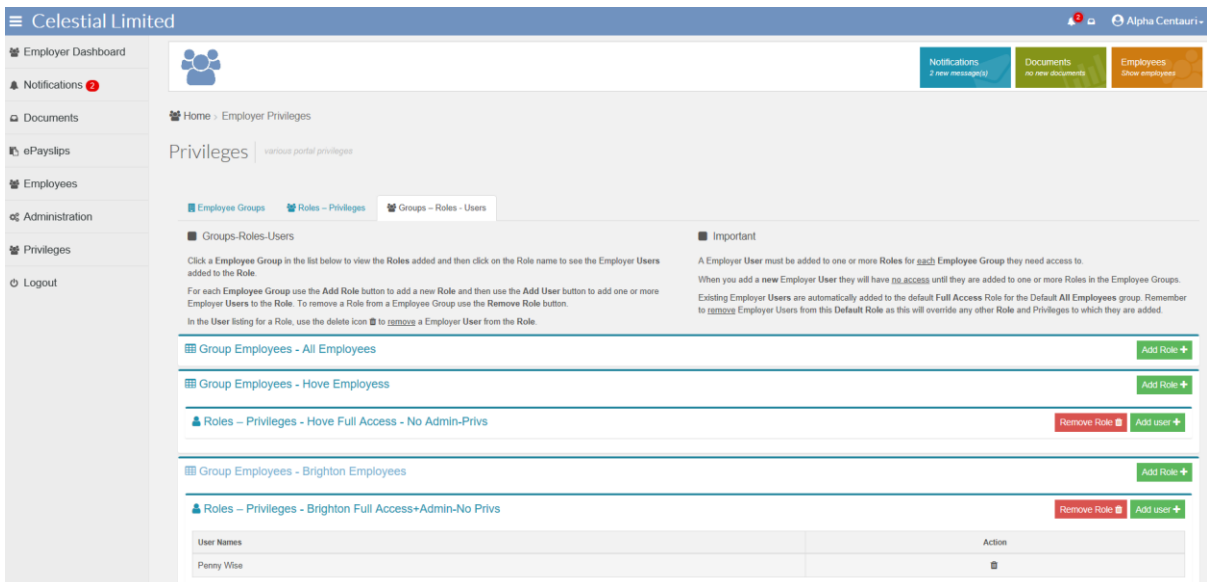
Privileges - Best practice

Once you start using Privileges to restrict access to one or more Employee Groups it is good practice to:

1. Create an alternative 'All Employees - Unrestricted' Employee Group and add all Employees to this by Analysis Group (not as 'All Data).
2. Create an alternative 'Employer Full Access' Role without Administration and Privileges access.
3. Add the 'Employer Full Access' Role to the 'All Employees - Unrestricted' Employee Group and add the majority of Employer Users to this role (see 4 below).
4. Leave your Employer Administrator in the default Full access role and default 'All Employees Group' and remove all other Employer Users – so your 'Super' or 'Admin' user retains Full access to everything.

Step-by-step:

Step 1 – Add 'All Employees – Unrestricted' Employee Group.

Step 2 – Add 'Employer Full Access' Role-Privilege.

Step 3 – Add Employer 'Full Access Role' to 'All Employees Unrestricted' and Add Employer Users.
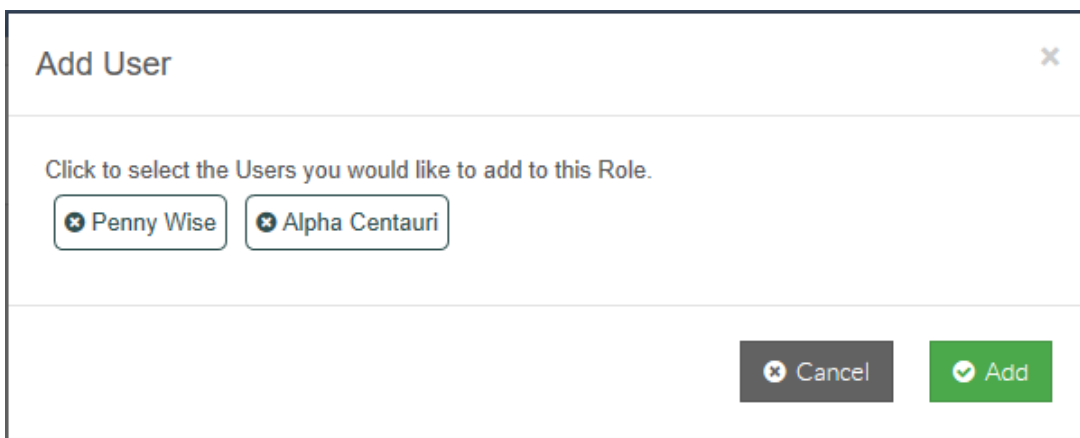
Step 4 – Remove all other Employer Users from Default All Employees Group – leave 'Super' User in Default Full Access Role.

Administration

The Administration page provides access to the following Payroll department administration functions:

- **Users tab** - A list of all the payroll department 'Staff' users and their Portal status. These users can be Deactivated, and be sent reset password or username emails as required.

- **Details tab** - The Payroll department address details, and the ability to set the default 'notification recipient' contact for the Payroll department user for Employer document uploads. 2 Step Authentication can be enforced here for your Payroll department Users. Set your Payroll department logo on your Employers Left menu.

- **Branding tab** – from here the Portal's Payroll department colour theme and a company logo can be defined

- **Employer Dashboard** – Create useful links that appear on your Employer dashboard, Create Broadcasts to show on all your Employers dashboards.

Notes: Employer Portal Users have a similar 'Administration' page with access to the same (very similar) functionality above to set up the Portal for their Employees

Access to the Administration pages can be restricted or denied to Payroll department Staff Users via myePayWindow Privileges. Refer to the Privileges section on how to do this.

Administration-Users

This page shows the Payroll Department Staff Users connected to the Portal together with their Portal Status.

Click anywhere on a Staff user entry, or on the '+' button to see the actions available for the individual Staff user – The actions available will vary depending upon the user status:

- Deactivate – Deactivate the Staff user's account
- Reset memorable word – Send a memorable word reset email to the Employer user
- Reset/Unlock – Reset password/username – Send a Password/username reset email to the Employer user. If the user is locked you can reactivate here.
- Delete – Delete user, this is only possible if the User status is 'Unregistered' or 'Invited'

Administration-Details

This page shows the Payroll department address and contact information as held in the in **Payroll Professional** details set up in Payroll that have been uploaded to the Portal. Any update required to this data will need to be made from '**Bureau Details'** in **Payroll Professional**.

On this page the Payroll department must choose (see Note) the default contact for all Employer 'document upload' notifications.

Note: By default the first 'activated' staff user in the list will be set. You can change this as required. If the payroll department does not want to use a single contact for all inbound document notifications, then they should instruct their Employers to pick the recipient for the document upload notification from the Employer Document **Upload** available via Employer **Documents** page

To choose the default contact, pick the user from the drop-down selector and click **Save Settings**

The payroll department has the option to set a centralised email for notifications. When an email is set for 'Email mailbox for centralised notifications' whenever an individual notification is sent to a payroll department user the centralised email will also be sent a message with the details of this. For example, when a client uploads a document to a payroll department user the centralised email will receive the following:

Subject: Celestial Limited has just uploaded a document to bureau user Holly Daypay

2 Step Authentication can be enforced here for all your Payroll department users. If 2SA is enforced here all Payroll department users will be prompted to create a memorable word when they next log in or register with myePayWindow. Click on Enable 2SA and Save Settings. See **2 Step Authentication – Payroll Department User Level** for more information

Payroll departments' can select the option to show their Payroll department logo on their Employers left menu.

Under **Administration/Details** tick the box show Payroll Department Company Logo and save settings.

By ticking this box, the Payroll department logo will show in the bottom left hand corner of the left-menu.

Administration-Branding

From this page the colour of the Portal's 'Top-bar' and the icons in the Notifications, Documents, and Employers listings can be set to match with the company branding. A Logo and a Logo URL can also be added. The Logo URL will allow a link to the URL when clicking on the Logo for example to the company's website (or another site of your choice).
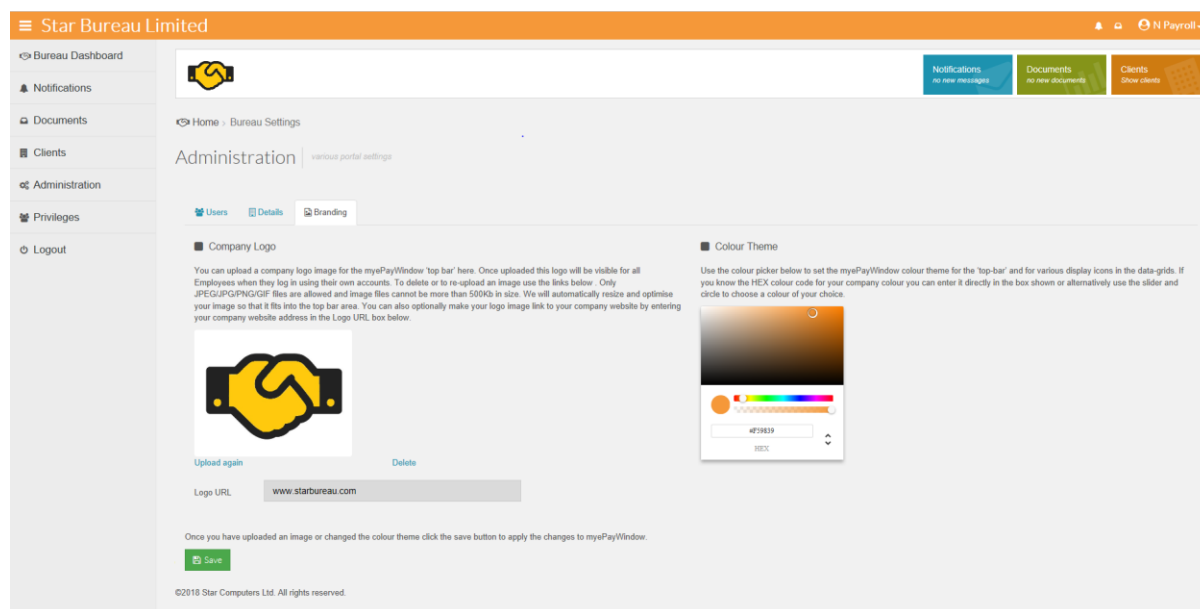
Company Logo – drag or click in the blue area to upload a logo image to the Portal, images cannot be larger than 500kb in size and will automatically be resized. Click upload again to replace an existing logo image.

Colour theme – use the slider or colour pane or enter a HEX / RGB / HSL colour code.

Note: Depending on the web browser you are using; you may be able to add a browser tool that will allow you to find out the colour code used on an existing website page element. If you do this, you will be able to match exactly the Portal with colour of your own website.

Click **Save**, to apply the Logo to the Portal and your chosen colour setting.

Administration-Employer Dashboard

From V8 Update 1 2020 some new features have added to myePayWindow which we believe will be helpful in supporting important client communications and employee engagement during these challenging 'working from home' times. The following new features have been added in this regard:

- The ability for a Payroll department user to broadcast a message to all their employers that will be visible on a user's homepage when they login.
- The ability for an Employer user to broadcast a message to all their employees that will be visible on the employee's homepage when they login.
- A Payroll department user can create useful hyperlinks to direct users to relevant websites for example latest Employer information for example regarding Covid-19 guidance and support
- An Employer user (or a Payroll department user on their behalf) can create useful hyperlinks to direct users to relevant websites for example latest Employee information regarding Covid-19, Furlough arrangements etc.

How to set up a **Payroll department -to-Employer Broadcast Message (Payroll department User)**

Navigate to **Administration/Employer Dashboard**. Use the date picker to pick the date from when you would like the message to display and enter the message text (a maximum of 500 characters). Click save.   This broadcast message will show on all your employers 'Employer' dashboards. Only one message can be displayed at a time. A message remains on display until it is replaced or removed. If you wish to remove the message you will need to click on clear and then 'save' and the message will be removed from the Employer dashboard.

The broadcast message will display as follows on the Employers Dashboard:-

How to set up **Payroll department -to-Employer Useful Links (Payroll department User)**
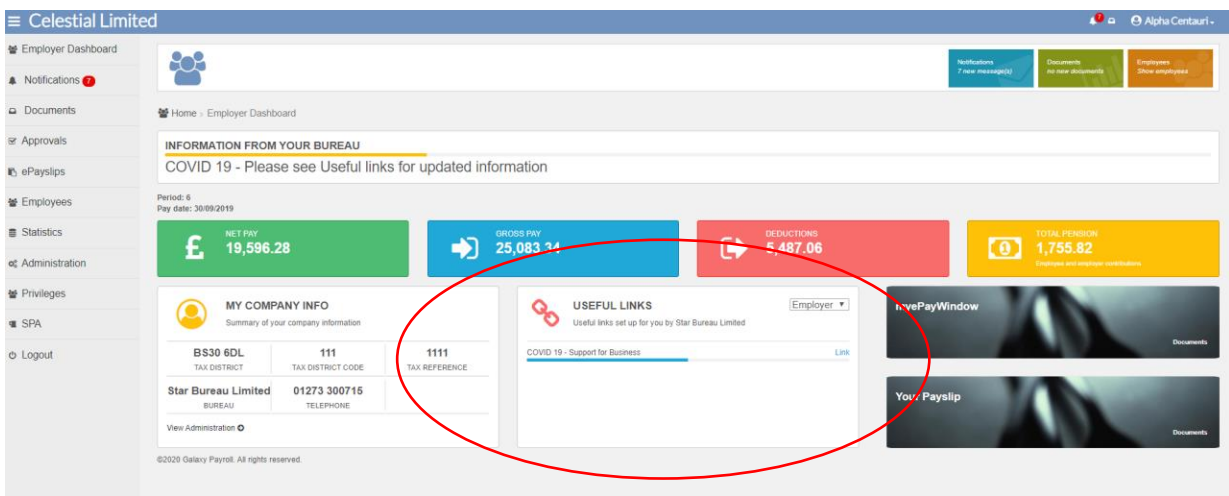
Navigate to **Administration/Employer Dashboard.** Click on the add new link button
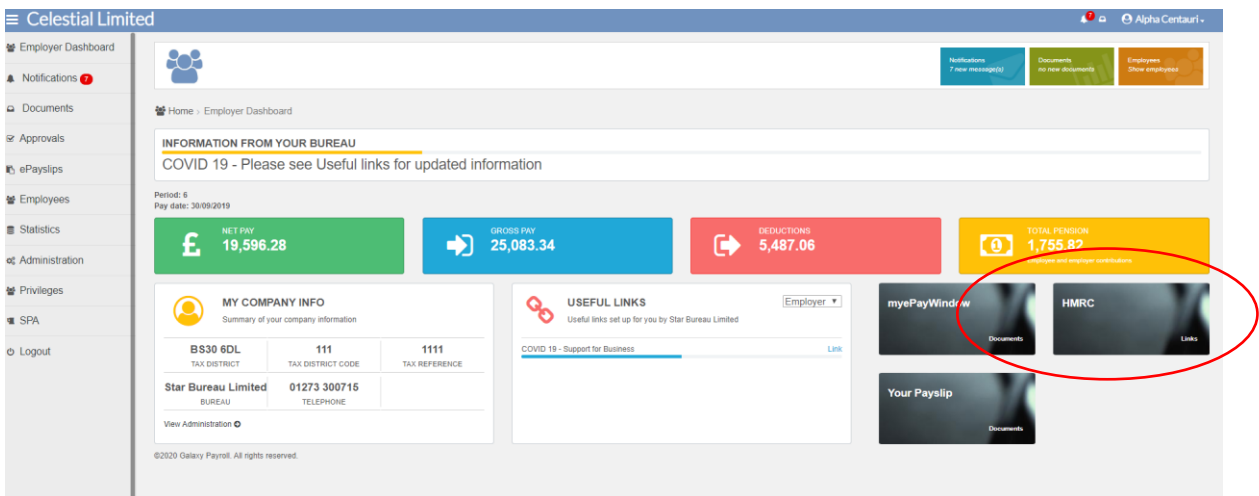
1. Enter the Title of the useful link e.g. Covid-19 Support for Business
2. Enter the URL of the website or Document
3. Choose whether you would like the website shown as a link or a tile on the dashboard
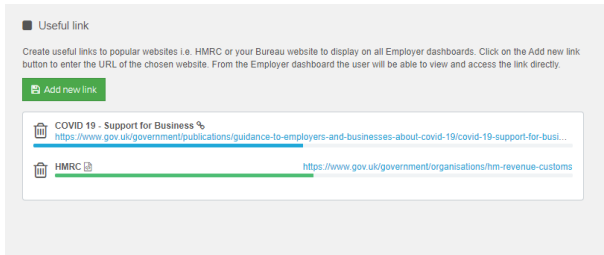
Click on Save new link

The useful link has been created on the Employer dashboard. You can create as many useful links as you like, however we recommend that create 5-8 Useful links and two tiles on the dashboard.
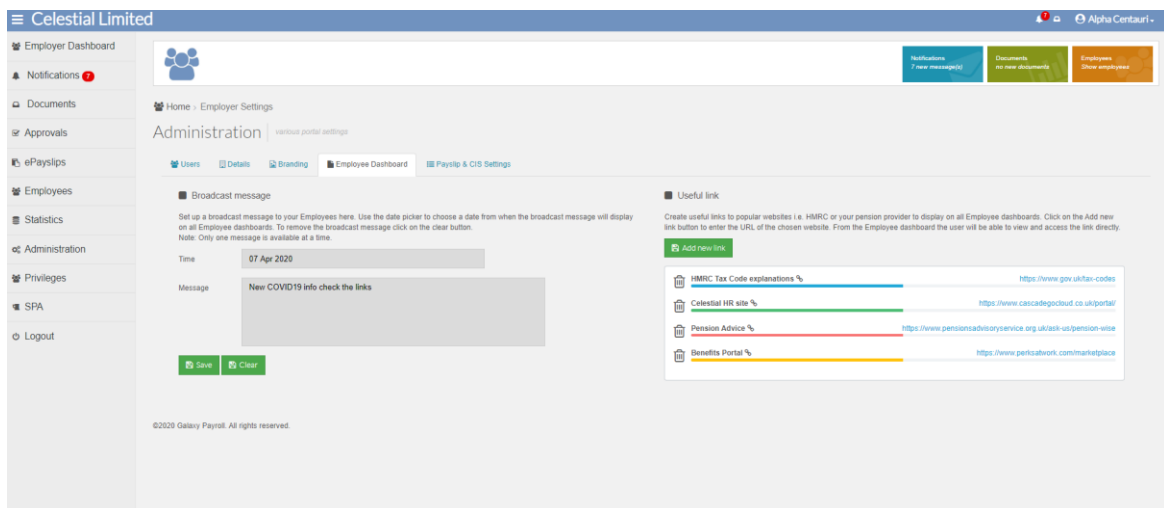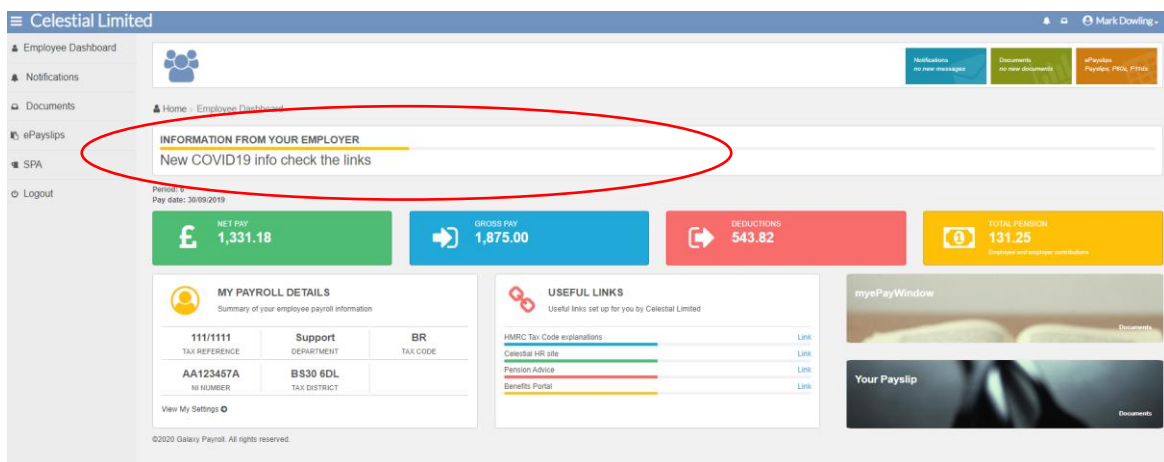

Below shows an example of a useful link as a tile.

To delete a useful link, navigate to **Administration/Employer Dashboard** and click on the bin icon. This will remove the link from the Employer dashboard.

How to set up an Employer-to-Employee Broadcast Message (Employer User)

Navigate to **Administration/Employee Dashboard**. Use the date picker to pick a date that you would like the message to show from and enter the message. Click save. This broadcast message will show on all employee dashboards. One message is available at a time. If you wish to remove the message you will need to click on clear and the message will no longer appear on the Employee dashboard.

The broadcast message will display as below on the Employee Dashboard:-

Privileges – Payroll department Level

The Privileges page provides access to the following Payroll department functions:

- Client Groups tab - Create new Client Group(s) and add Employers as required to the group(s)
- Roles-privileges tab - set-up new access Role(s) with appropriate privileges
- Groups-Roles-Users tab - add the required Role(s) to each Client Group(s) and add the Staff Users to each Role (remove them from the Full Access Role as required).
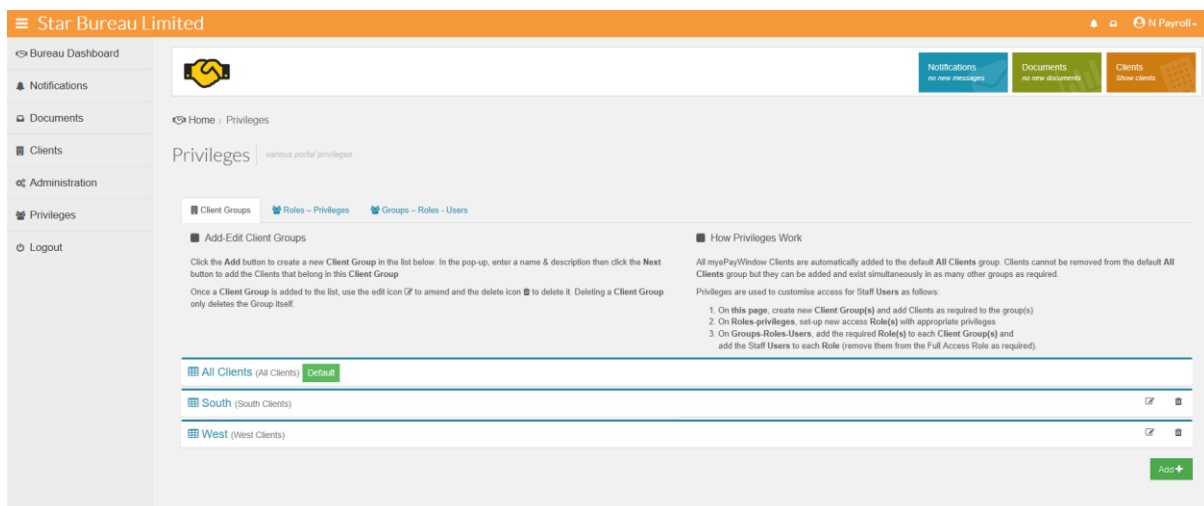
Notes: Depending on the Role a staff User belongs to, access to the Privileges page may be restricted or unavailable.

You do not need to use Payroll department Privileges but please read this section carefully to ensure how Privileges impact myePayWindow operation.

Step 1 - Add Client Group
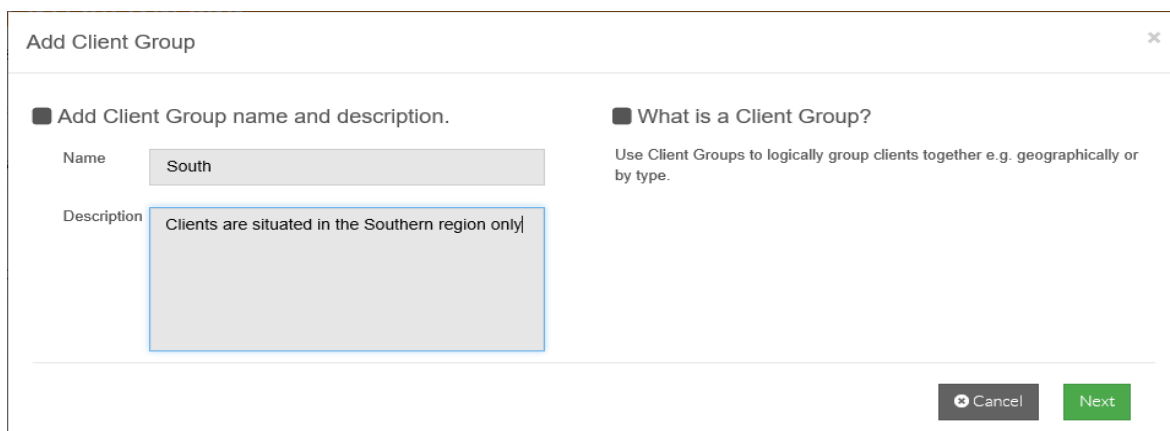
From the Privileges - Client Groups page, you can create a logical Client group and add employers to it.

Note: All myePayWindow Employers are automatically added to the default All Employer group. Employers cannot be removed from the default All Employers group but they can be added and exist simultaneously in as many other groups as required.

Click the Add button at the bottom of the Client Group listing to Add a **Group** (to edit or delete a Group use the Icons per Group in the listing).

You must enter a Client Group Name (100 Characters) and provide a description (500 Characters).

Add Employers to the Employer Group (s)

Use the alpha/numeric filters or use the search box, then click the client name(s) (to highlight in green) to add to the Client group. You can Click the 'Yes' button in the select All Data section to add All Employers to the group.

Note: When you choose 'Select All Data' a group entry called 'All Data' is automatically included in the Client Members section and not individual Client names.

To remove individual Employers from the Group, click the waste-bin Icon in the Client Members section of the screen.

When you have chosen all the Employers for this Group, Click Save to apply.

Step 2 - Create Roles – Privileges

On the Privileges - Role–privileges page create a **Role** and add **Privileges** to it:

Notes: Existing Staff Users are automatically added to the default Full Access Role that has full access privileges to the default All Employers group.

When you add new Staff Users they will have no access until they are added to one or more Roles as defined here.

You can only delete a Role if it is not added to a Client Group.

Click the Add button at the bottom of the Roles listing to Add a **Role** (to edit or delete a role use the Icons per Role in the listing).

You must enter a Role Name (100 Characters) and provide a description (500 Characters).

Click next to Add Role Privileges…

Add Role **Privileges**

Role **Privileges** allow different levels of access to myePayWindow menus and the actions available within them. A main menu item can be **Allowed** or alternatively **Custom** access can be used to further refine access **(Full Access, No Access, Read only)**. For example, in the screen image below, using the drop-down selectors, a **Role** can be set up to **Custom** access to the Employers menu but with **Read only** access to the Employees 'action' but with '**No access**' to the ePayslips action. Note: setting the ePayslips action to '**No access**' will override any higher level 'Full Access' which would otherwise allow Employees payslips to be viewed.

Choose the access levels using the selectors below, click save to apply.

## Step 3 – Add Roles and users to Client Groups

The final step is to add **Roles** to **Client Groups** and Staff **Users** to the Roles as required.

Notes: A Staff User must be added to one or more Roles in each Client Group they need access to.

When you add a new Staff User they will have no access until they are added to one or more Roles in the Client Groups.

Existing Staff Users are automatically added to the default Full Access Role for the Default All Employers group. Remember to remove Staff Users from this Default Role as this will override any other Role and Privileges to which they are added.
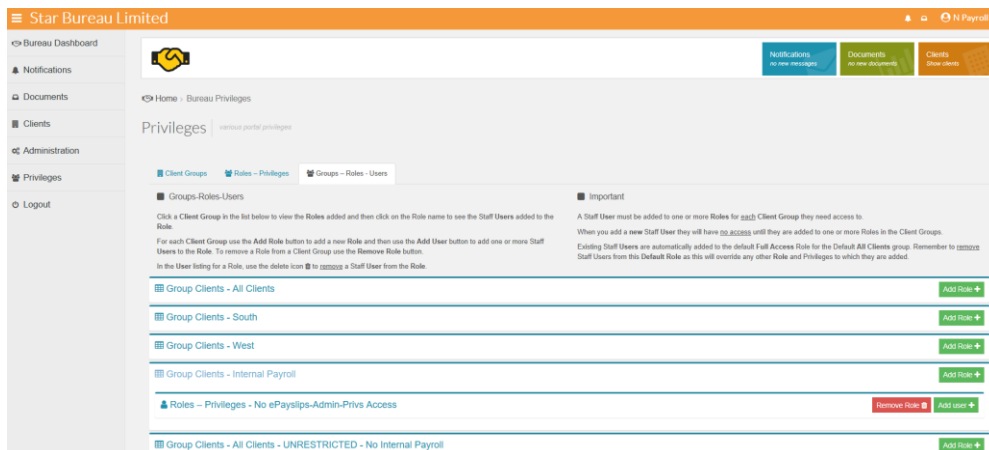
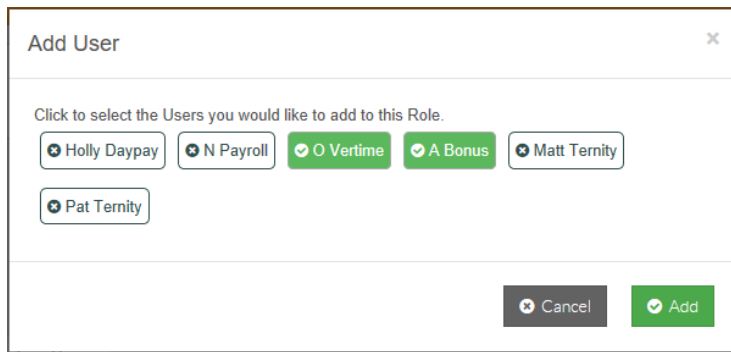For the required Client Group in the listing click the Add Role button.
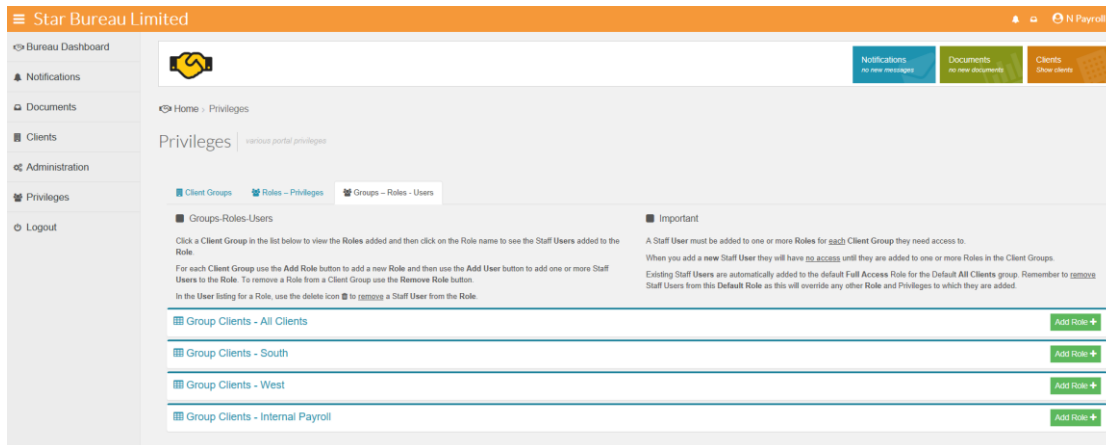
Select the roles you would like to add to the Client group. Click on Add.
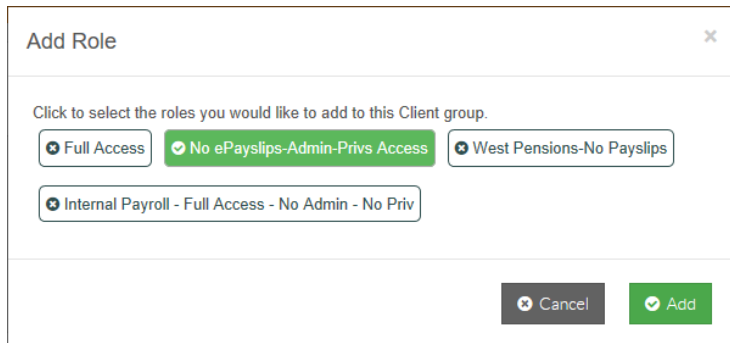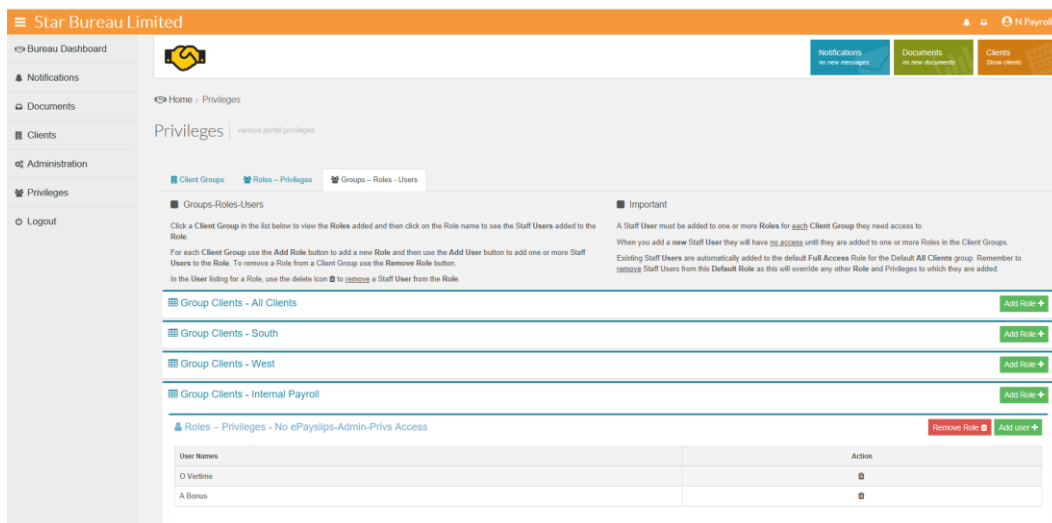

Click on the Add User button or the Remove Role Button to delete the Role.

Select the users you would like to add to the Role. Click on Add.

Use the waste-bin icon to delete users from the role.

Privileges - Best practice

Once you start using Privileges to restrict access to one or more client payrolls it is good practice to:

5. Create an alternative 'All Employers - Unrestricted' Employer Group and add all employers to this by name (not as 'All Data).
6. Create an alternative 'Payroll department Full Access' Role without Payroll department Administration and Privileges access.
7. Add the 'Payroll department Full Access' Role to the 'All Employers - Unrestricted' Client Group and add the majority of staff to this role (see 4 below).
8. Leave your Payroll department Administrator in the default Full access role and default 'All Employers Group' and remove all other Staff Users – so your 'Super' or 'Admin' user retains Full access to everything.

Step-by-step:

Step 1 – Add 'All Employers – Unrestricted' Employer Group.

Step 2 – Add 'Employer Full Access' Role-Privilege.

Step 3 – Add Employer 'Full Access Role' to 'All Employers Unrestricted' and Add Staff Users.
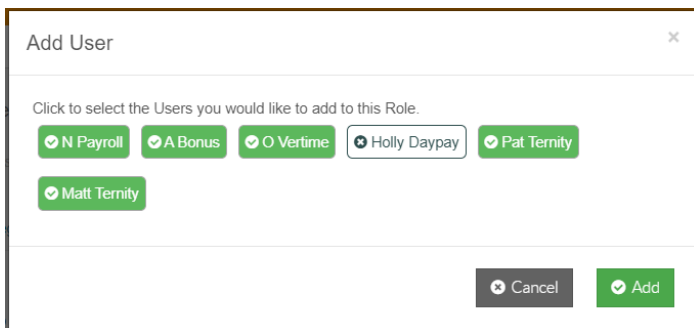
Step 4 – Remove all other Staff Users from Default All Employers Group – leave 'Super' User in Default Full Access Role.
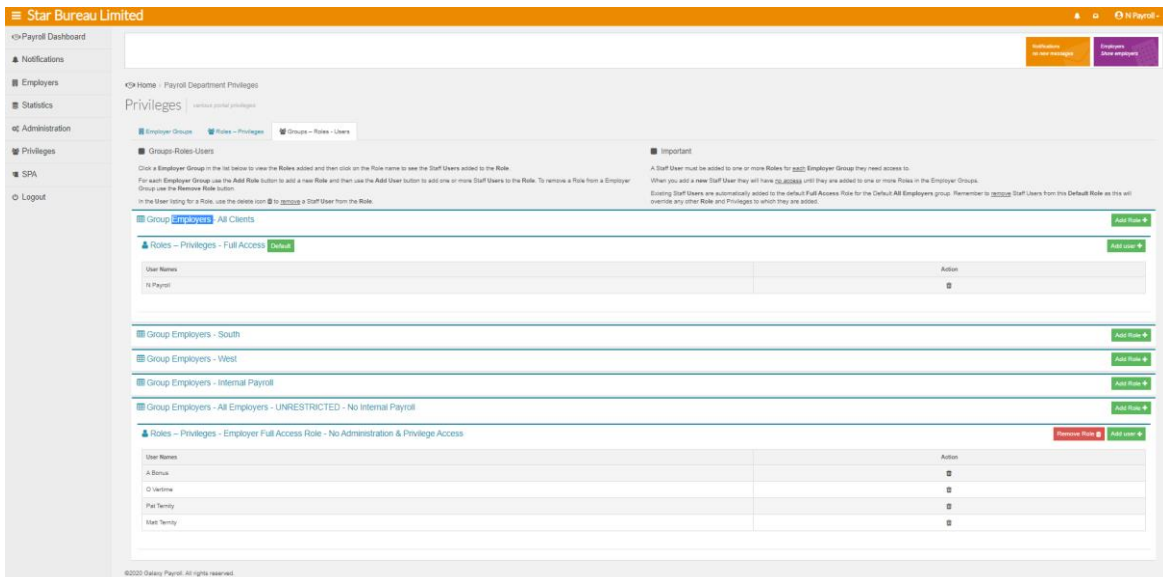

Note: All Users will be able to see all employers apart from the Internal payroll. Please remember any new Staff Users will have no privileges assigned by default so you will need to add them to a Role for them to have access to any Employers.

For further information on Employer level privileges please refer to the Employer user guide
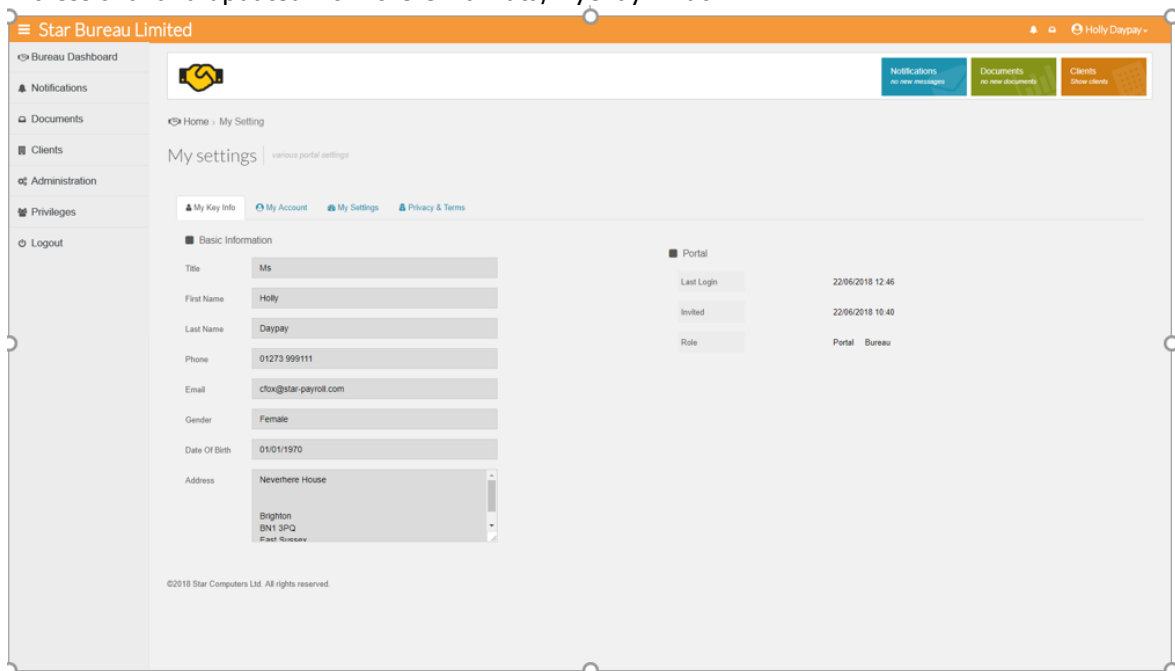
My Settings

My Settings contains the individual Portal user's settings and details. Various personal preferences can be set here for the Payroll Department user and these features will be extended in future releases:
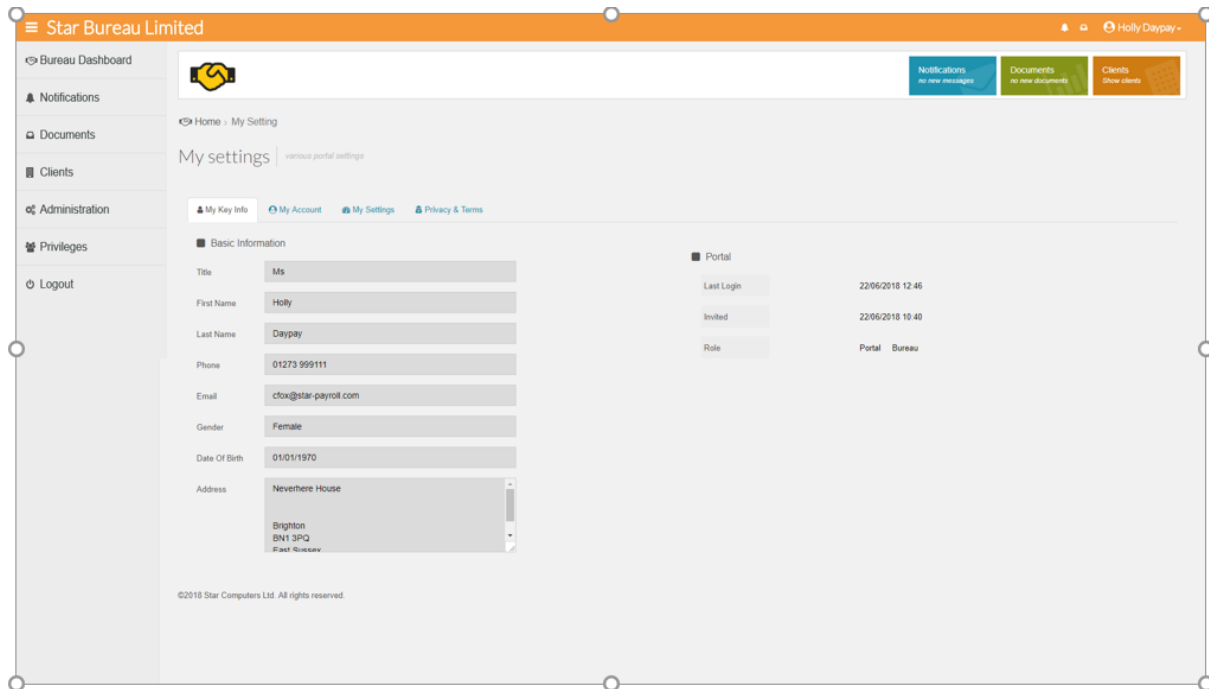

My Settings - My Key Info

■ My Key Info – The Staff user's details as held in Payroll Professional and their last Portal login date, the date they were invited and their Portal 'role'.

Note: You are unable to edit these fields. Any Data changes required here must be made in Payroll Professional and updated from there via Data/myePaywindow.

My Settings - My Account

- My Account – Reset password / username as required (The reset process will log the user out of the Portal). Click **Change password or Change username**, to start the reset process.
- Enable/Remove 2 Step Authentication on your account provided that it isn't enforced via Administration at Employer/Payroll Department Level.
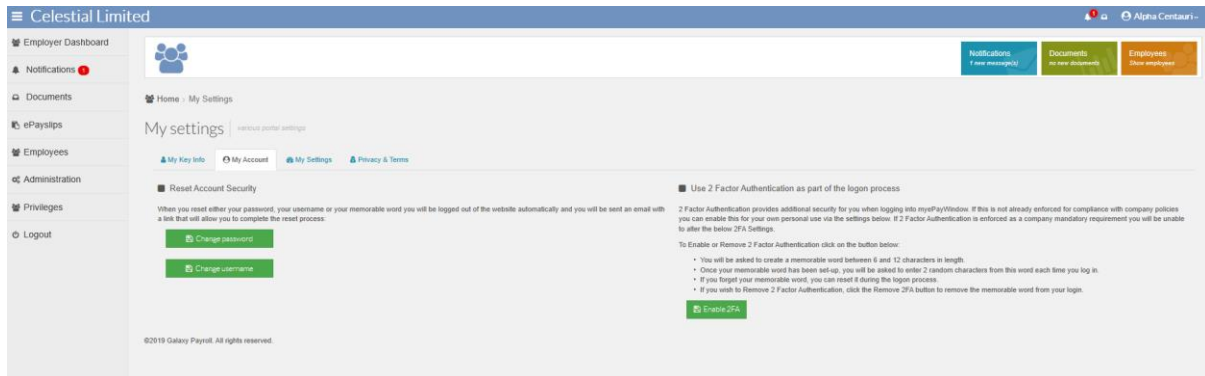
Click on **Enable 2SA** and **confirm**.

Click on **Confirm** to set-up your memorable word.
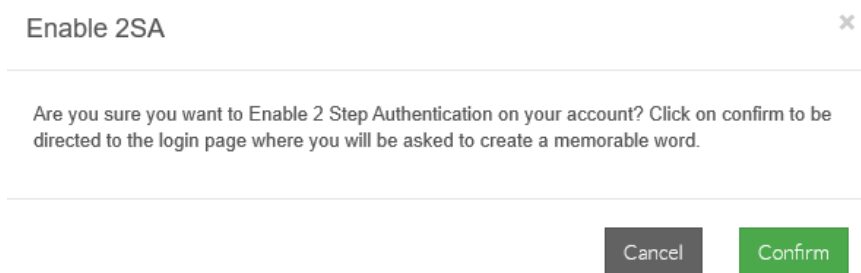
After entering their username & password, the user can 'Set-up' their memorable word. The memorable word can be a mixture of letters and digits and must be between 6 & 12 characters in length.
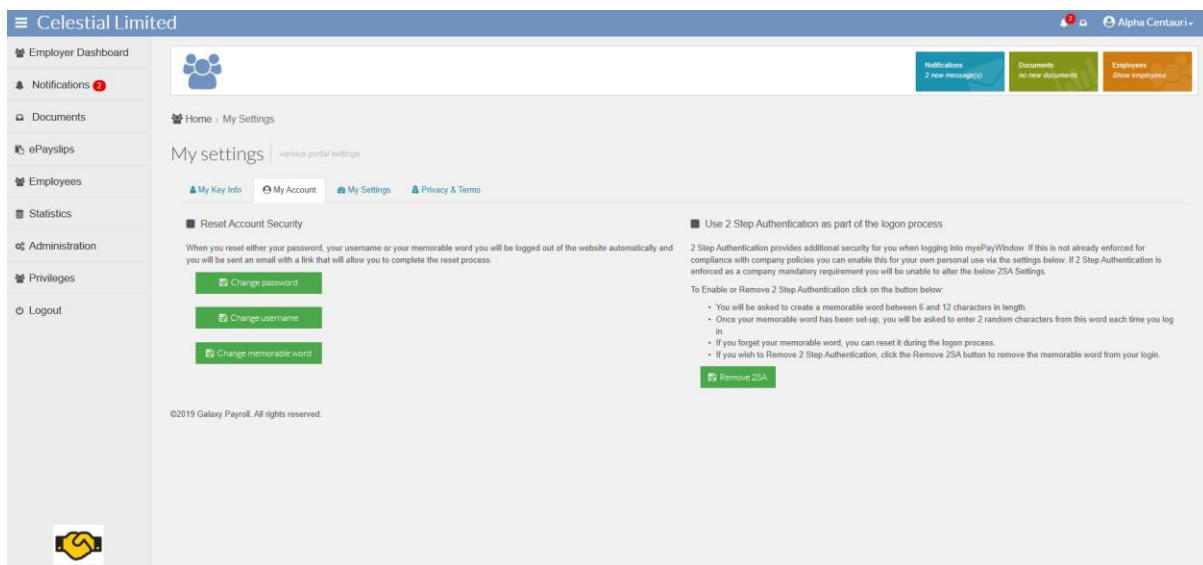
Once a username & password is entered a second page is displayed where the user can enter two random characters from their memorable word.

A message is displayed if incorrect characters are entered.

If 2SA is not enforced, a user can Remove 2SA from their account, via My Settings, My Account and the Remove 2SA button. You can also change the memorable word here.
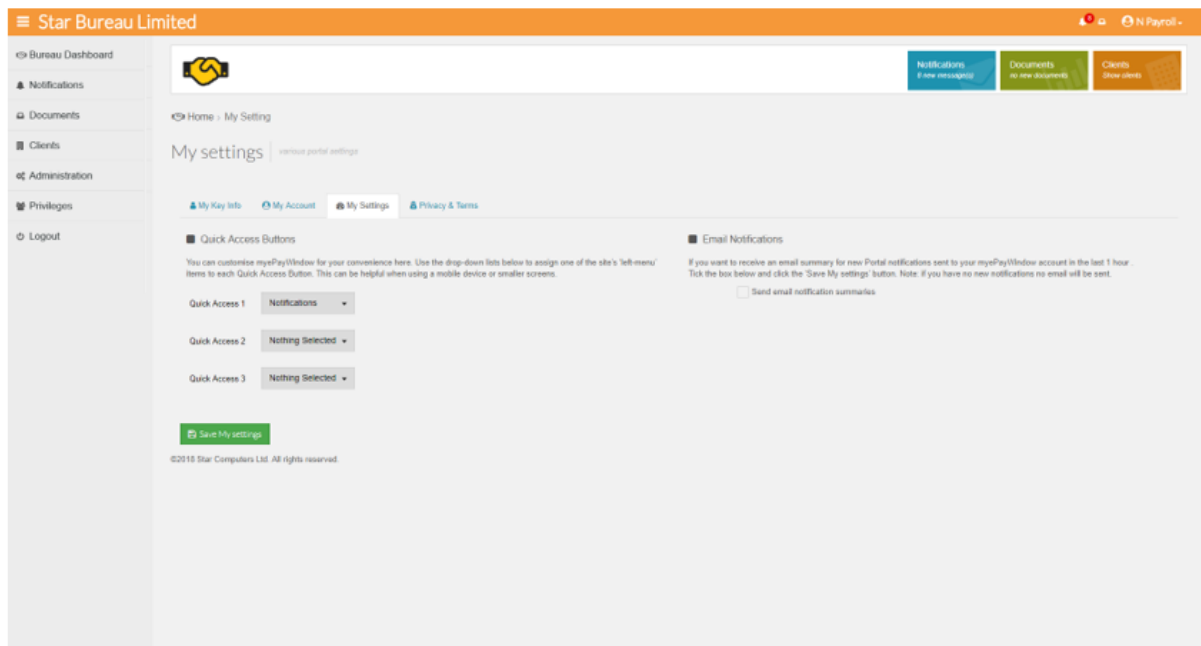
Click on Remove 2SA to confirm.

The User will be re-directed to the login screen to enter their credentials to confirm the Remove 2SA action.

My Settings - My Settings

The My Settings tab allows you to personalise the Portal as follows:

- 🔹 Quick Access Buttons – for easier user access via a smartphone or small tablet

Use the drop-down selectors to assign a left-menu item to **Quick access button 1, 2, 3** click **Save Dashboard** to save changes and apply.

Note: The Quick access buttons are for convenience when accessing the Portal on a mobile device. (You can set your favourite menu item to the Quick access button (3) that will be closest to your thumb on a smartphone!)
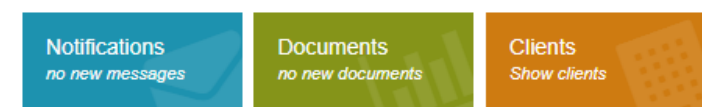
- Email Notifications – to opt to receive email notification summary to your registered Portal account email address

Use this tick box to opt to receive an an email summary for new Notifications. An email summary will be sent to your registered account email addrees (see My Key Info) <u>if you have new, unread notifications in the last 1 hour.</u>
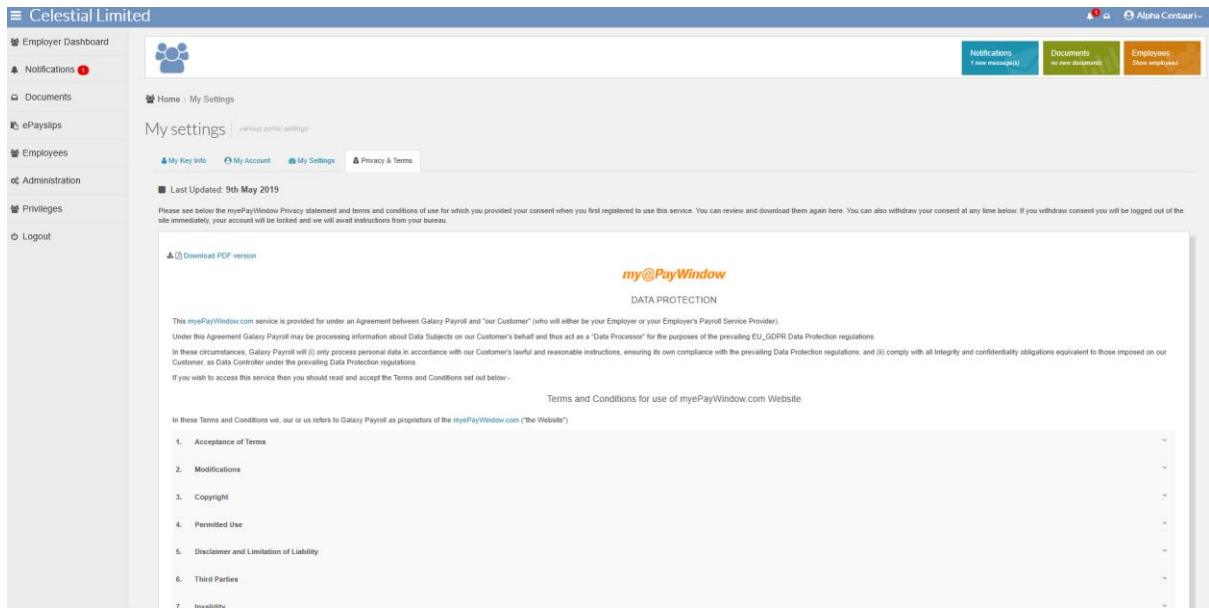

By opting to receive an email notification, you will be notified on the email associated with your account, that a new notifiacation has been received. These will be sent hourly if there has been no activity on your Portal account.
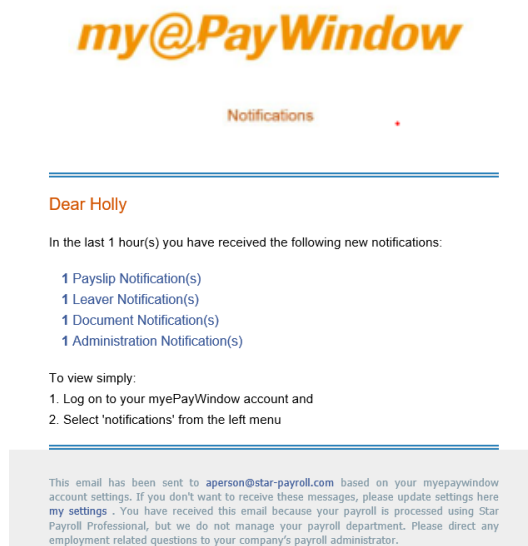

My Settings - Privacy & Terms

- Privacy and Terms – View / download myePayWindow terms and privacy and access Consent option

Every Portal user must provide consent on registration. If they wish to withdraw consent after registration they can scroll to the base of this screen and click '**I do not agree**' button. This action will deactivate the user immediately and set their status to Declined, notifications will be sent to the Employer and Payroll department user.
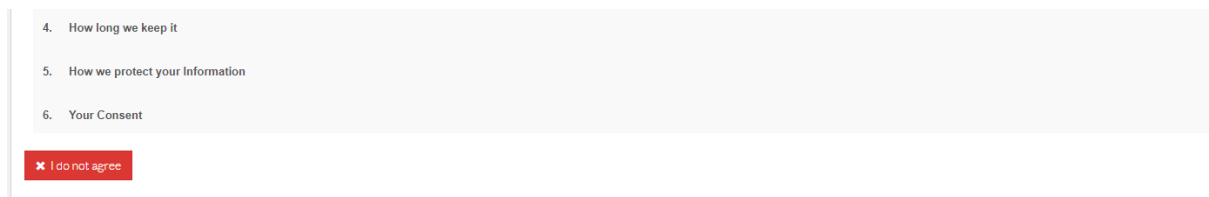
Any user that declines consent will need to be re-invited if they subsequently decide they want to use the Portal.