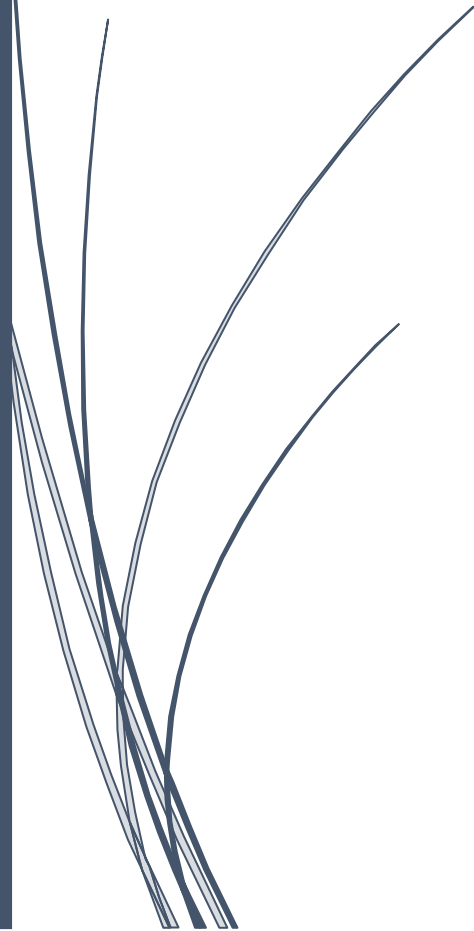




# Employee Migration User Guidelines



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# Migrating your employees to Able

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

Our application supports 2 methods of employee migration:

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

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

## Points to remember:

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

# How to import?

## 1. Employee migration process for different Able applications

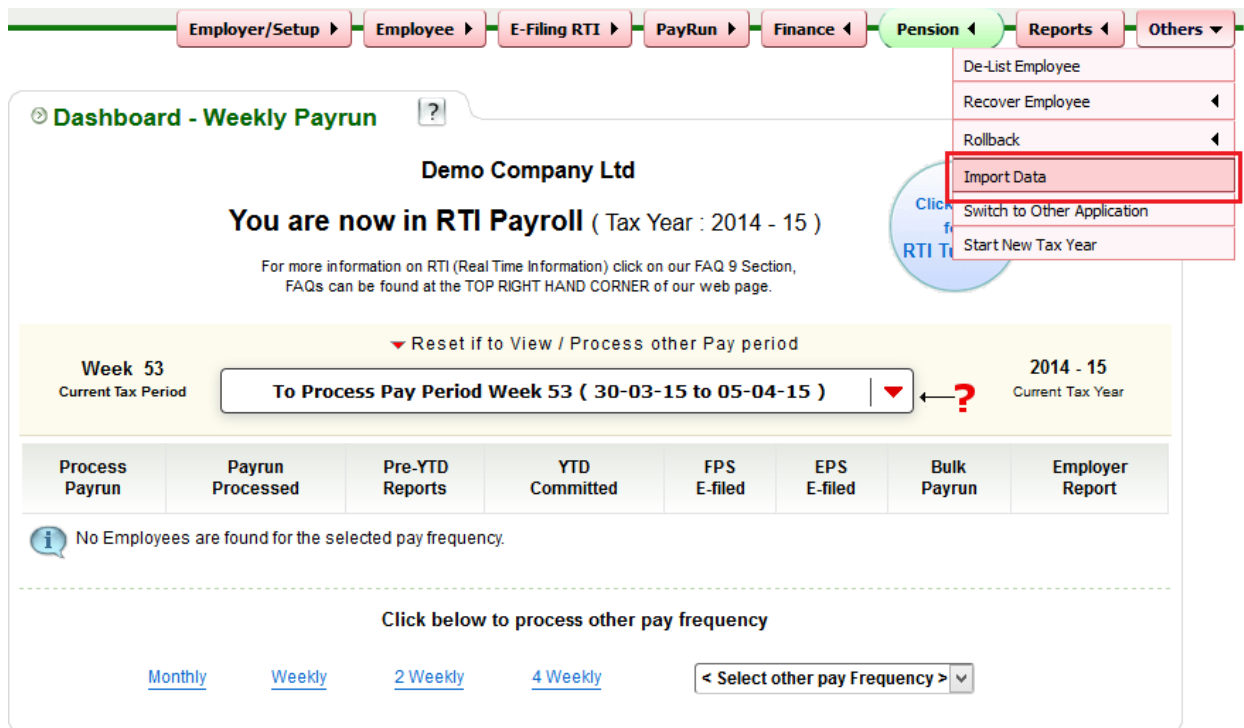
We now look into how to import employee details to the three different applications of Able. There isn't any much difference in the procedure, only some variation in the initial steps that you need to follow for the three applications (Standard Able Internet Payroll, Able PayBureau and Able Multisites).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

### 1.1 Standard Able Internet Payroll

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

**Road Map:**

**Others->Import Data**



**Fig 1.1.1 Standard Able Import data**

## 1.2 Able Pay Bureau

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

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

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

### Road Map:

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

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

Fig 1.2.1 Bureau Main Page 1

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

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

Fig 1.2.2 Bureau Import Data Option 1

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

**Road Map:**

Client Details->Others->Import

**Bureau Main Page** ?

**Demo Bureau Limited**

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

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

[Click here for RTI Tutorial](#)

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

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

Fig 1.2.3 Bureau Main Page 2

**Dashboard - Weekly Payrun** ?

**Demo Company Ltd**

You are now in RTI Payroll ( Tax Year : 2014 - 15 )

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

Reset if to View / Process other Pay period

Week 52 Current Tax Period To Process Pay Period Week 52 ( 23-03-15 to 29-03-15 ) 2014 - 15 Current Tax Year

Process Payrun	Payrun Processed	Pre-YTD Reports	YTD Committed	FPS E-filed	EPS E-filed	Bulk Payrun	Employer Report
No Employees are found for the selected pay frequency.							

Click below to process other pay frequency

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

Fig 1.2.4 Bureau Import Data Option 2

### 1.3 Able Multisites

From the Multisites application you can import the employee details of various branches of a single company at the same time. Click on 'Head Office details' in the Multisite main page. Then click on 'Import Data' under the 'Others' option from the tasking zone.

**Road Map:**

Head Office Details->Others->Import data

The screenshot shows a navigation bar with three buttons: 'Head Office Details' (highlighted with a red box), 'Add New Branch Office', and 'Admin Payrun'. Below the navigation bar is a table titled 'Branch Office Details' with the following data:

Row No.	Branch Office Name	Branch Office Details	Current Employees	Status	Process	Process	Remove Branch Office	P11D Tax Year	PAYE Tax Year
1	Tescom Center	<a href="#">Enter</a>	21	Active	<a href="#">P11D</a>	<a href="#">TimeClaim</a>		2014 - 15	2014 - 15
2	Tescom 1 - London	<a href="#">Enter</a>	65	Active	<a href="#">P11D</a>	<a href="#">TimeClaim</a>	<a href="#">Remove</a>	2014 - 15	2014 - 15

**Fig 1.3.1 Head Office details**

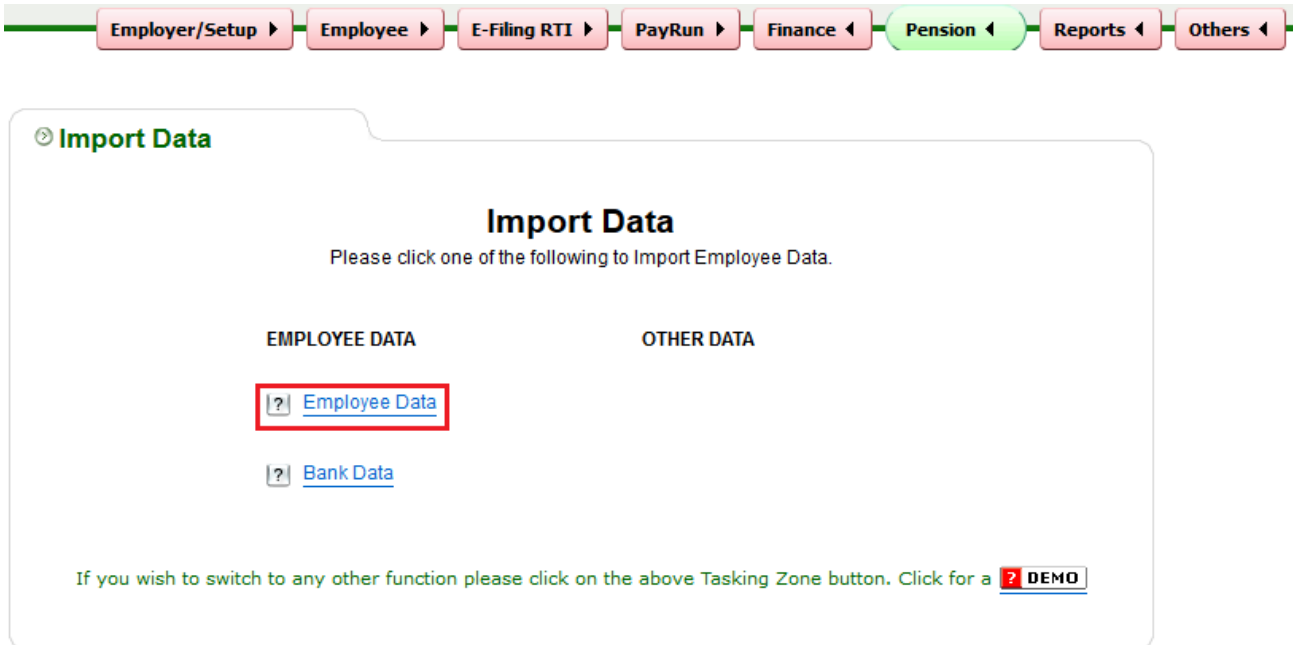
The screenshot shows the 'Head Office Details' page for 'Demo Company Ltd'. The page includes a navigation bar with tabs: Employer/Setup, Employee, E-Filing RTI, PayRun, Finance, Pension, Reports, and Others. The 'Others' dropdown menu is open, and 'Import Data' is highlighted with a red box. The main content area displays company information for 'Demo Company Ltd' (12, LC5 3FT, United Kingdom) and various configuration options with 'View / Edit' buttons, such as 'Head Office Contact Details', 'Head Office Bank Details', 'Head Office System Administrator Details', 'Former Branch Offices', 'Support Request', 'PayRun & BACS Customisation', 'E-Filing Setup', 'Head Office System User Internet Account', and 'Branch Office System User Internet Account'. The 'Accounts Office Ref.' is 111PA1234567X.

**Fig 1.3.2 Multisites Import Data**

## 2. Download spreadsheet procedure for employee migration

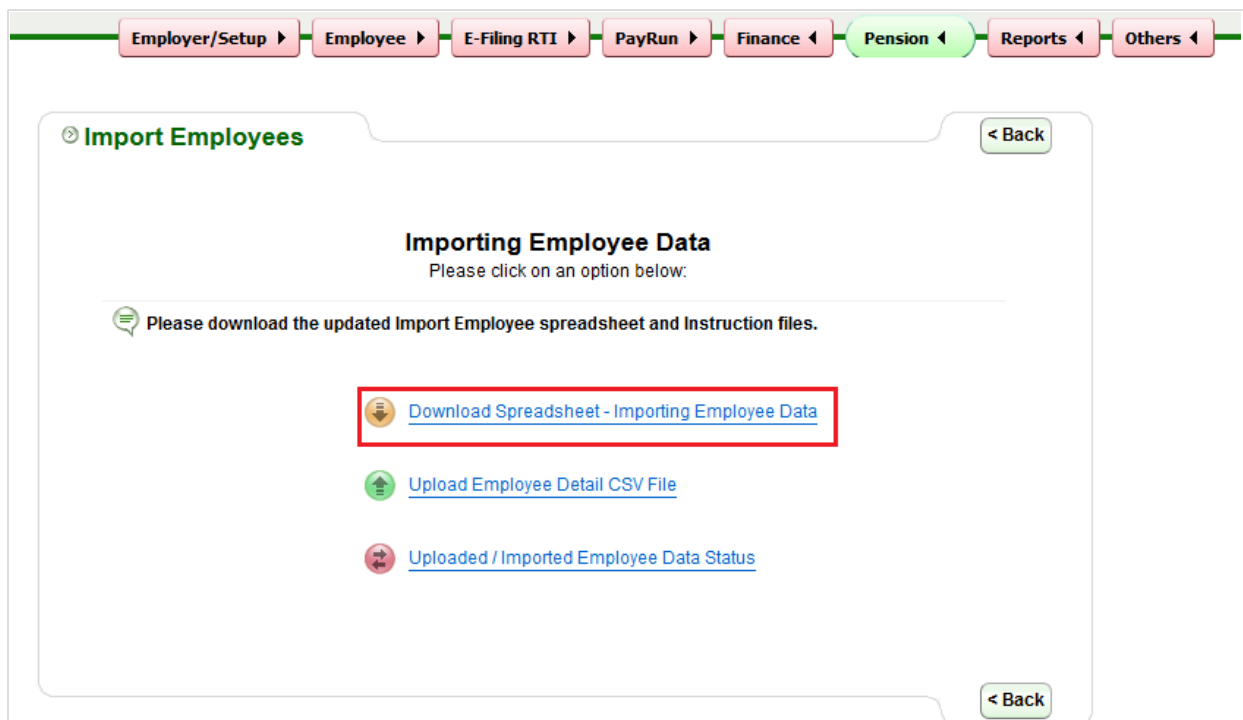
All the procedures hereafter are the same for all the three applications of Able. Follow the instructions below for any application.

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



*Fig 2.1 Import data*

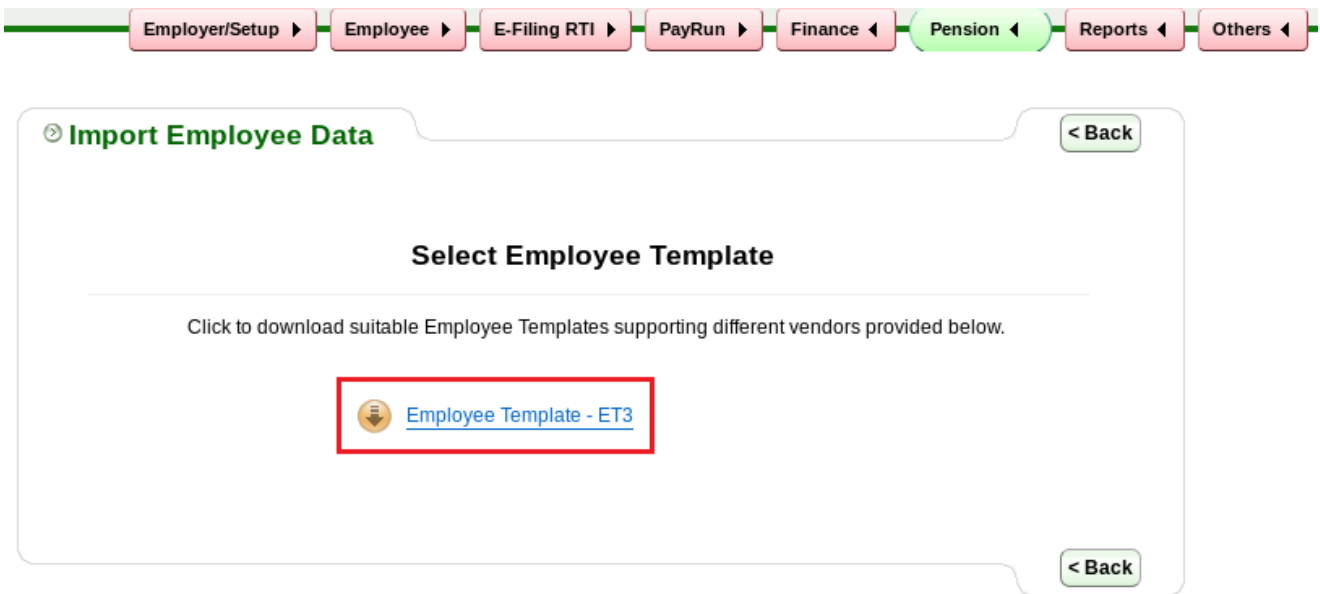
**Step 2:** Please thoroughly read all the data importing instructions before you proceed to download the template and then click on the 'Click To Continue' button. Now click on 'Download Spreadsheet-Importing Employee Data'



*Fig 2.2 Importing Employee Data*

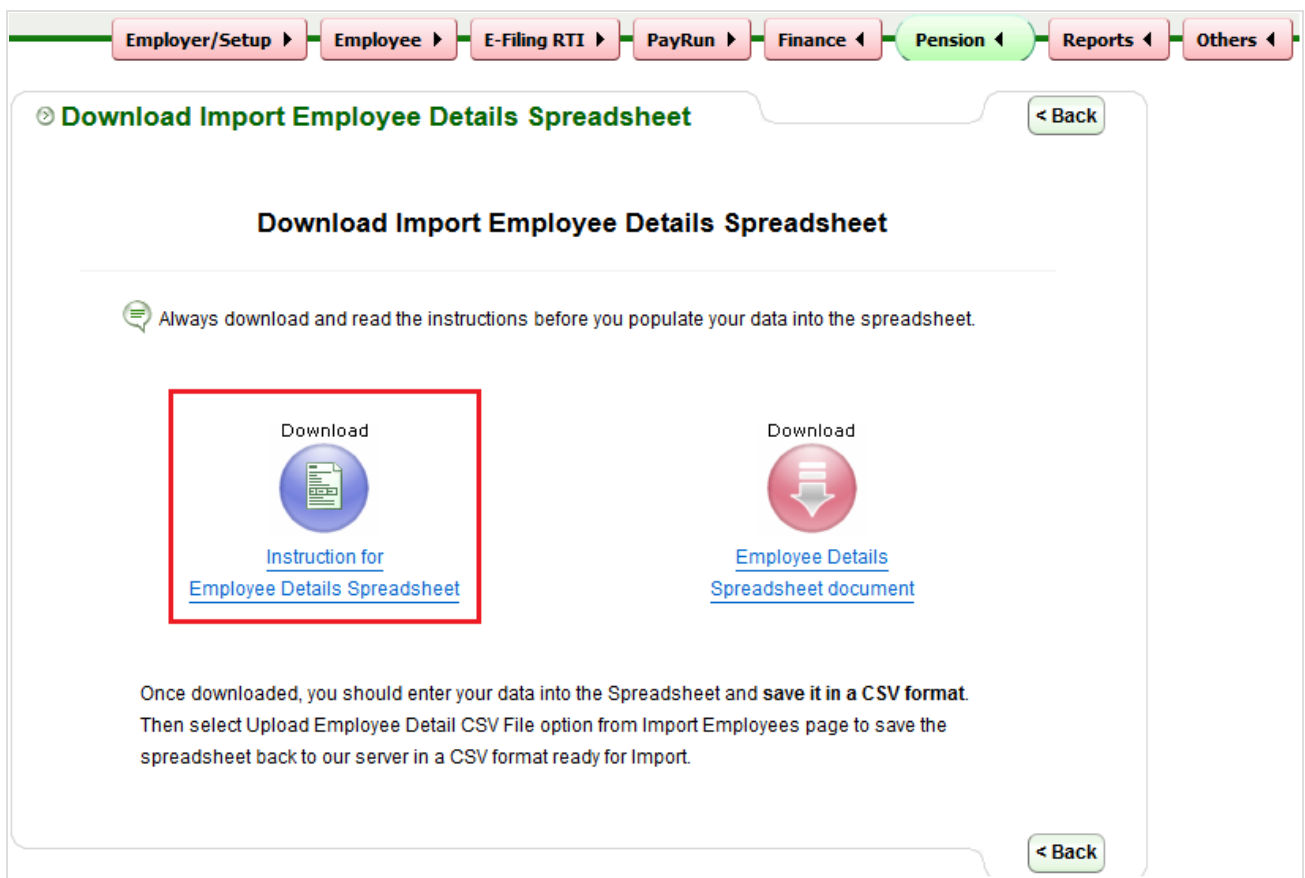


**Step 4:** Select the employee template.



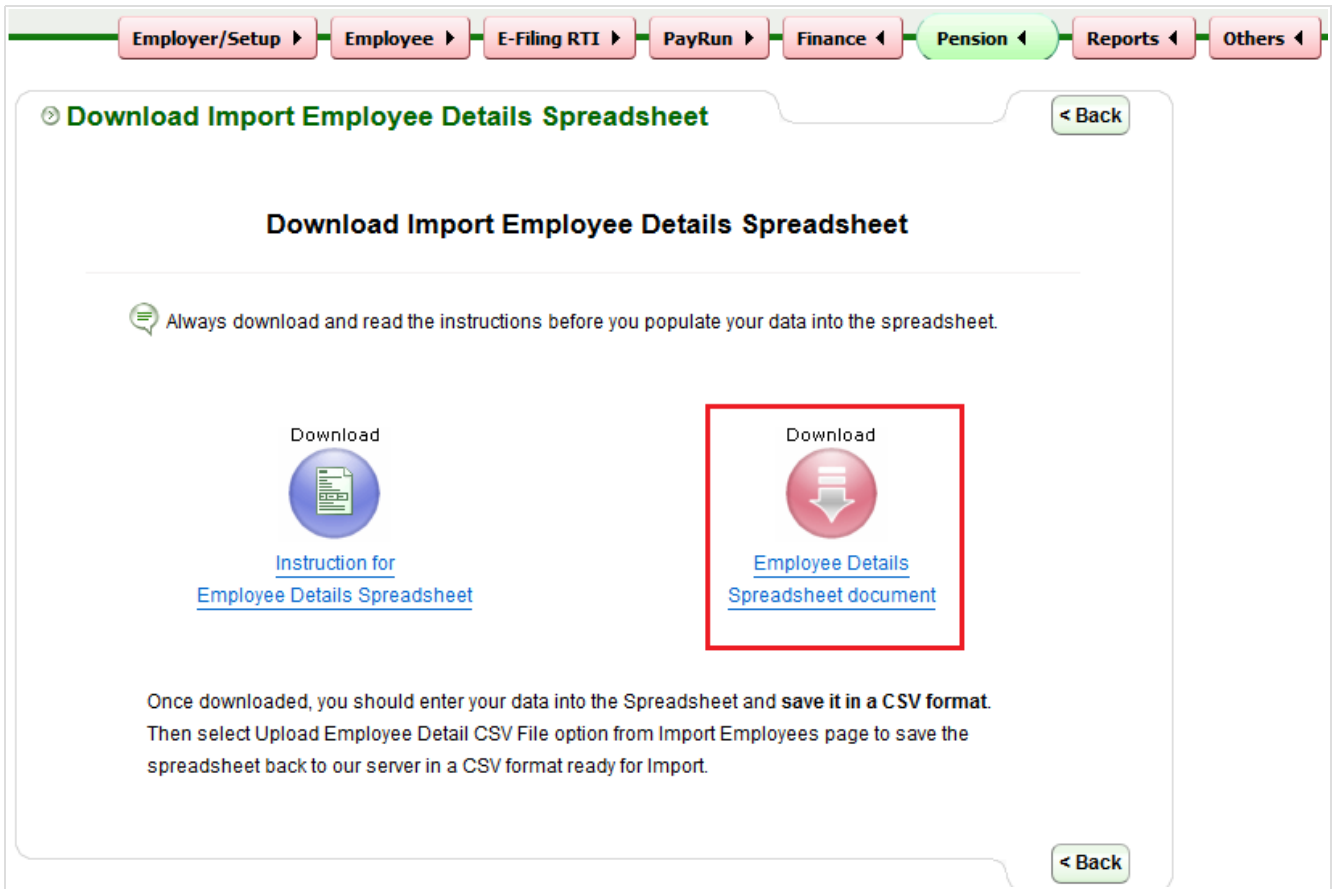
**Fig 2.3 Employee Template**

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



**Fig 2.4 Download Instruction**

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



**Fig 2.5 Download Spreadsheet**

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

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

**Fig 2.6 Employee Migration Spreadsheet**

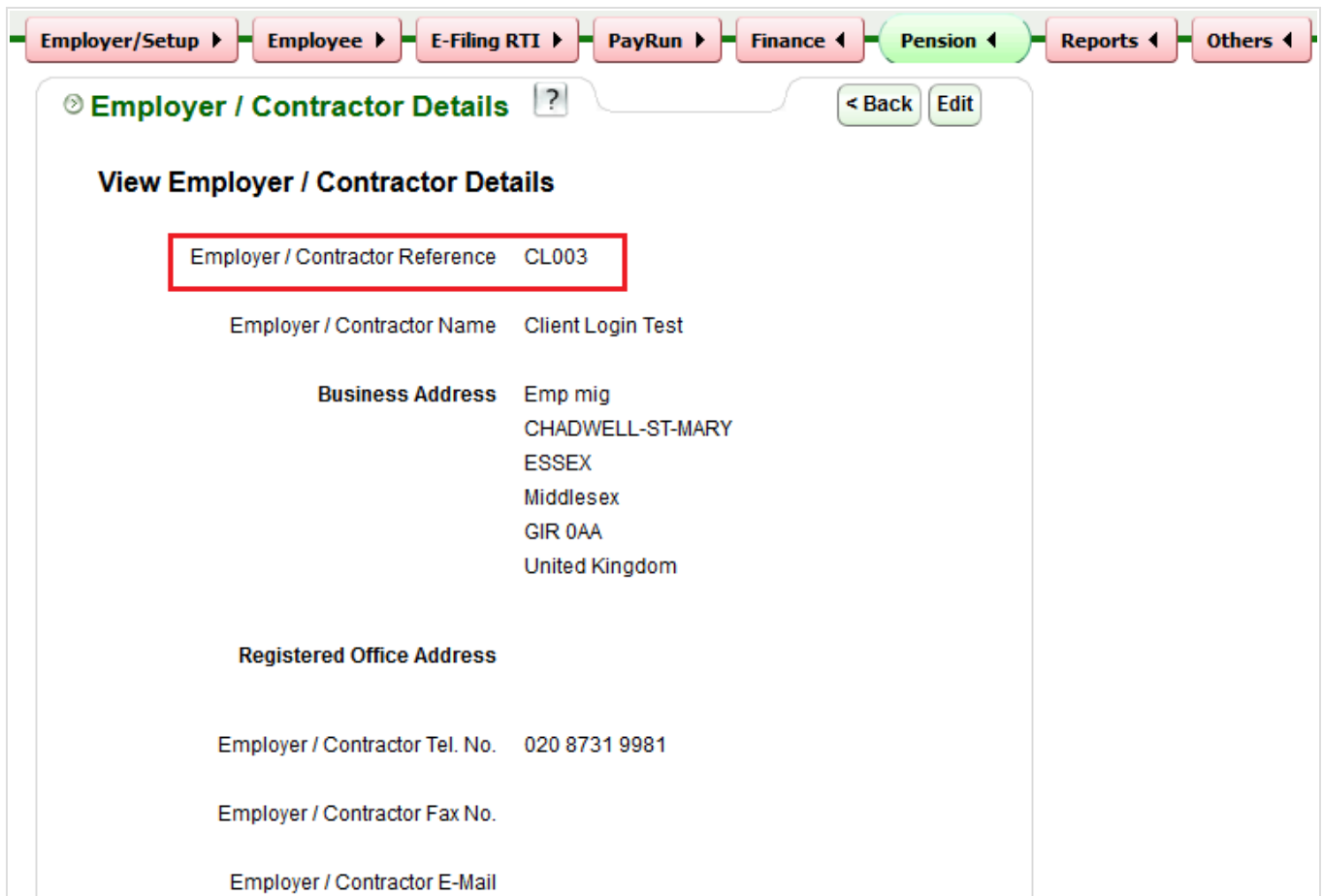
**Please note:**

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

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

**Road Map:**

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



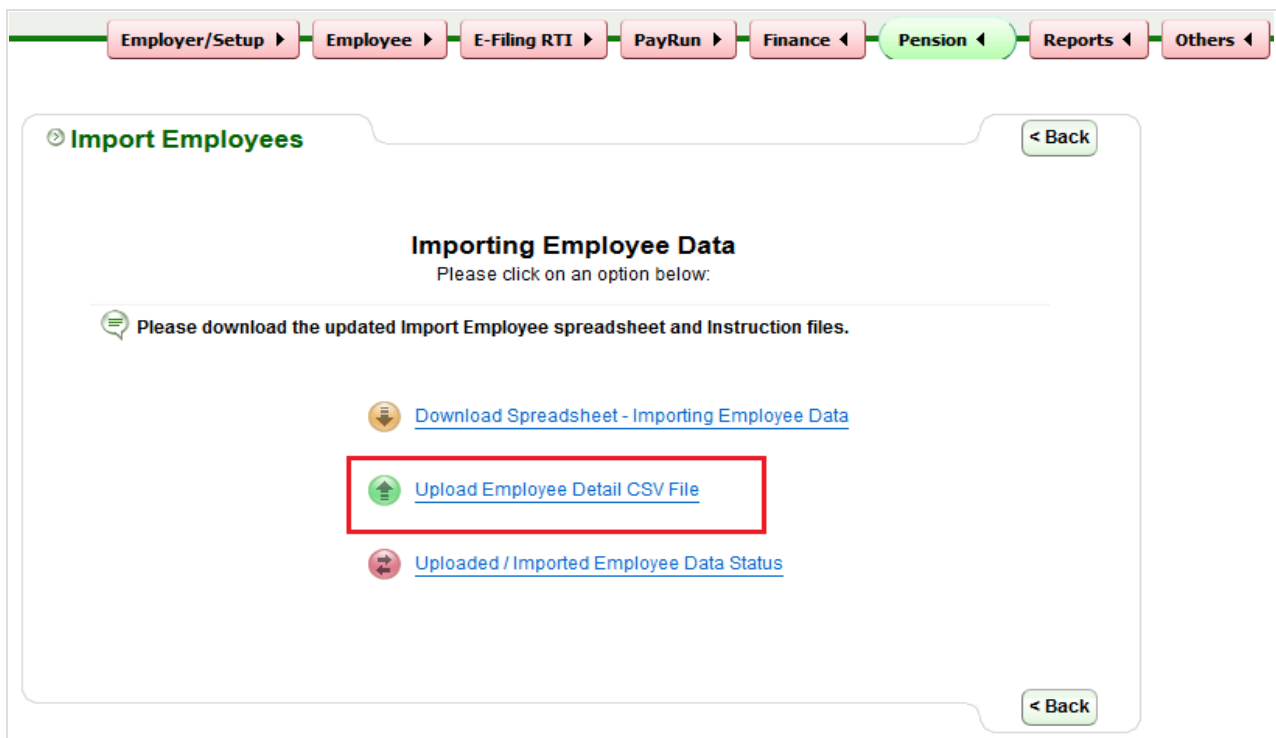
**Fig 2.7 Employer / Contractor Reference**

### 3. Uploading Employee Data CSV File

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

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

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



**Fig 3.1 Upload employee detail CSV File**

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

**Fig 3.2: Upload CSV File**

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

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

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

**Fig 3.3 Employee Data Status**

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

**Confirm Importing Employee Data**

**NOTE:** Before you proceed, please ensure that the Employee Details that you are importing is correct. To confirm enter your password and click on the Confirm button to proceed

Enter User Sign In Password\*  ?

[Click here to Import](#)

**Fig 3.4 Confirm Importing**

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

**Importing Employee Data**

**Importing Employee Data - Successful**

Your uploaded list of employees has been successfully imported.

**Follow the instructions below to check the imported Employee details.**

- Click on Employee on the Tasking Zone
- Click on the View / Edit Employee Details menu item.
- Click on the Individual Employee View / Edit Link to check.

[< Back to List](#)

**Fig 3.5 Successful Importing**

## Employee Login Demo

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

**Please click on the below link to view the demo:**

<https://youtu.be/CksJ53D6byc>

## To Know More:

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

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