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

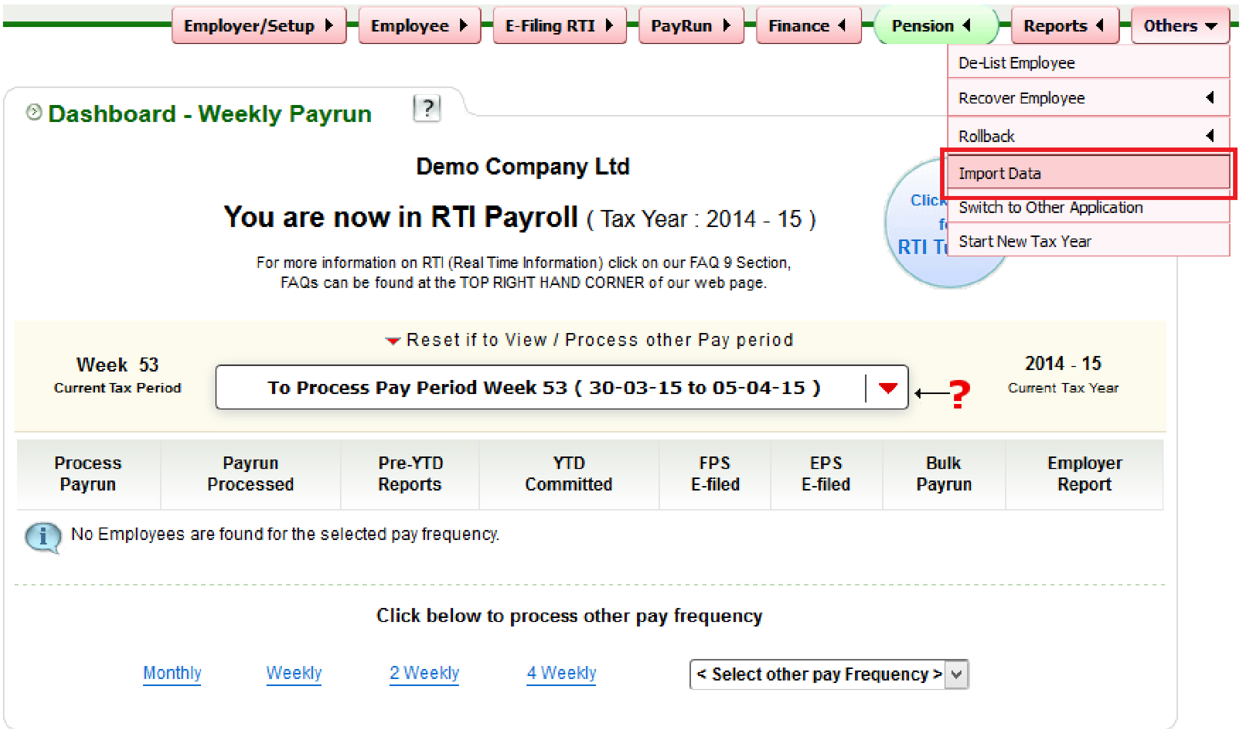
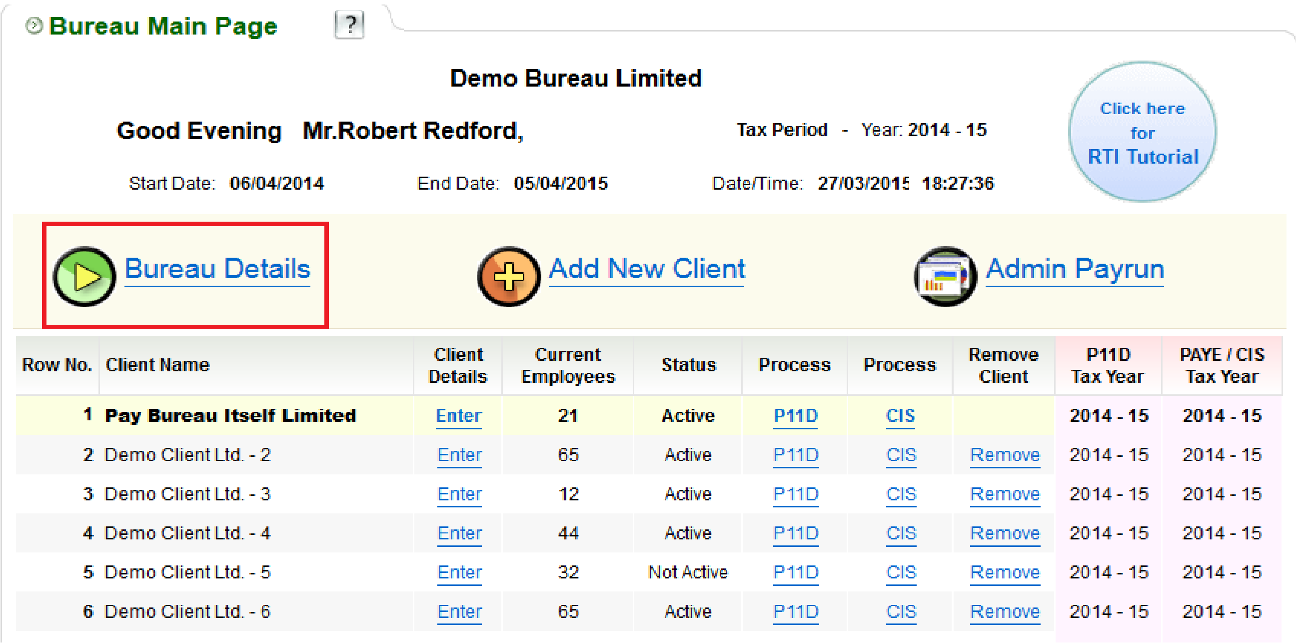


Fig 1.1.1 Standard Able Import data

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**	Enter	21	Active	P11D	CIS		2014 - 15	2014 - 15
2	Demo Client Ltd. - 2	Enter	65	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
3	Demo Client Ltd. - 3	Enter	12	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
4	Demo Client Ltd. - 4	Enter	44	Active	P11D	CIS	Remove	2014 - 15	2014 - 15
5	Demo Client Ltd. - 5	Enter	32	Not Active	P11D	CIS	Remove	2014 - 15	2014 - 15
6	Demo Client Ltd. - 6	Enter	65	Active	P11D	CIS	Remove	2014 - 15	2014 - 15

Fig 1.2.1 Bureau Main Page 1

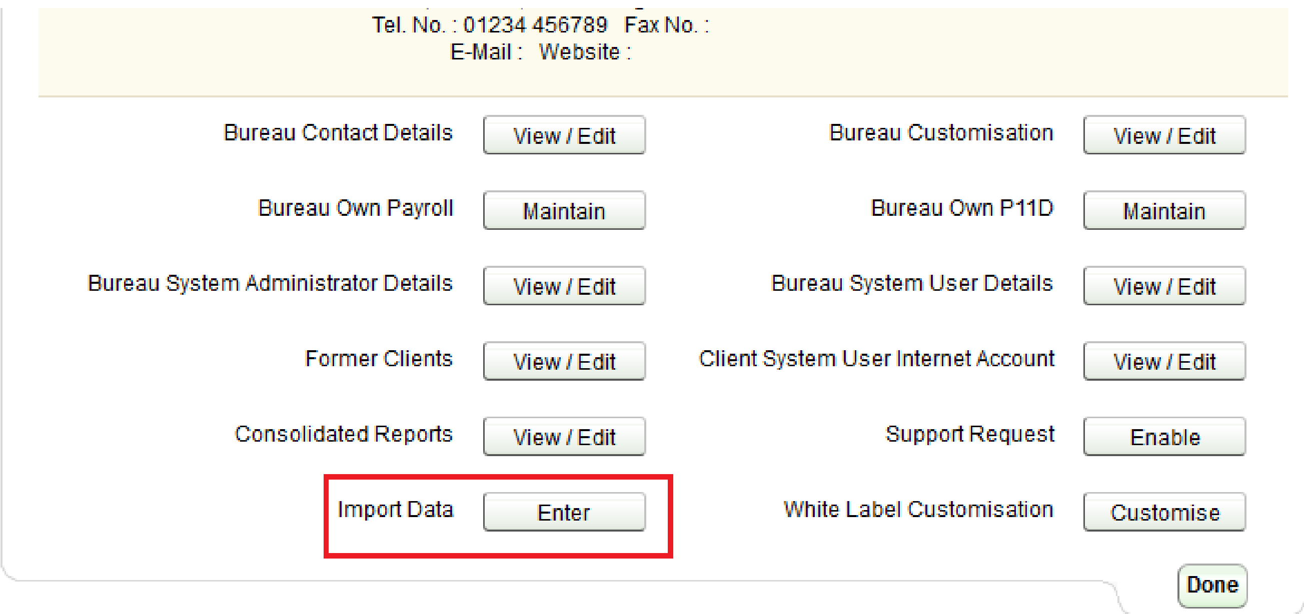


Fig 1.2.2 Bureau Import Data Option 1

(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

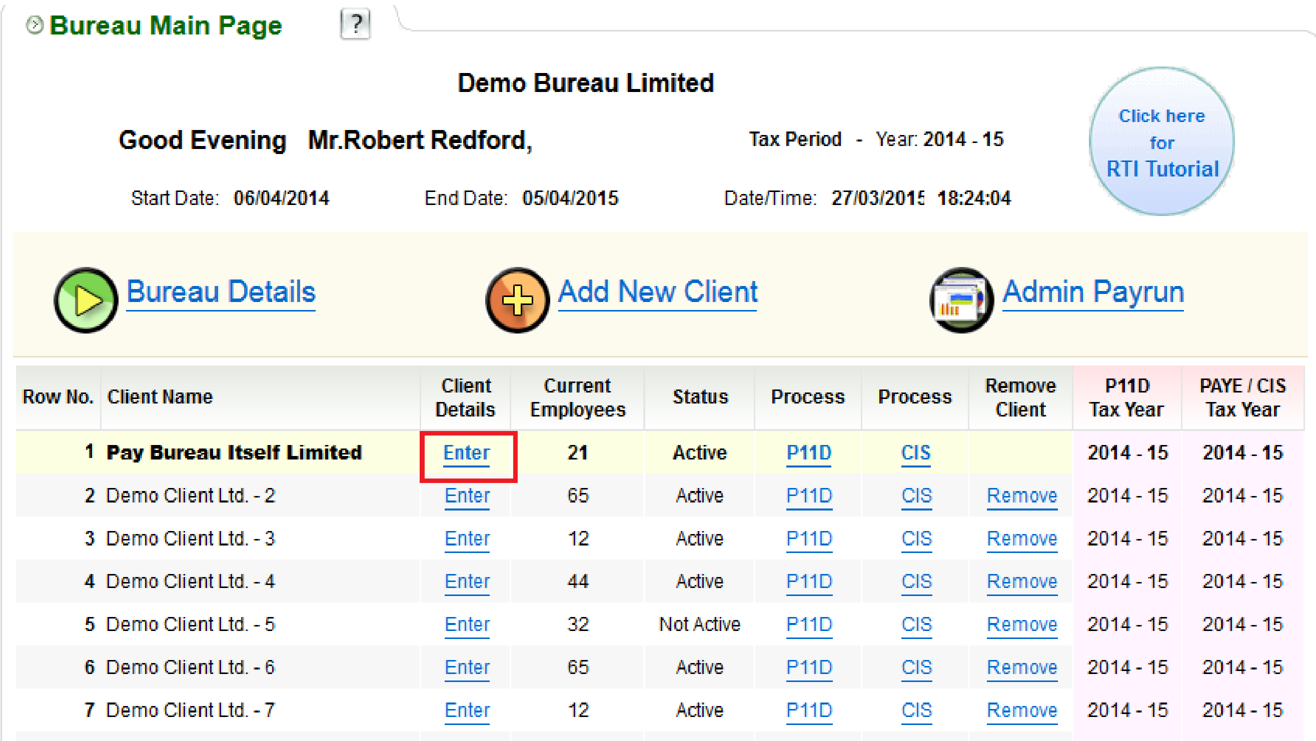


Fig 1.2.3 Bureau Main Page 2

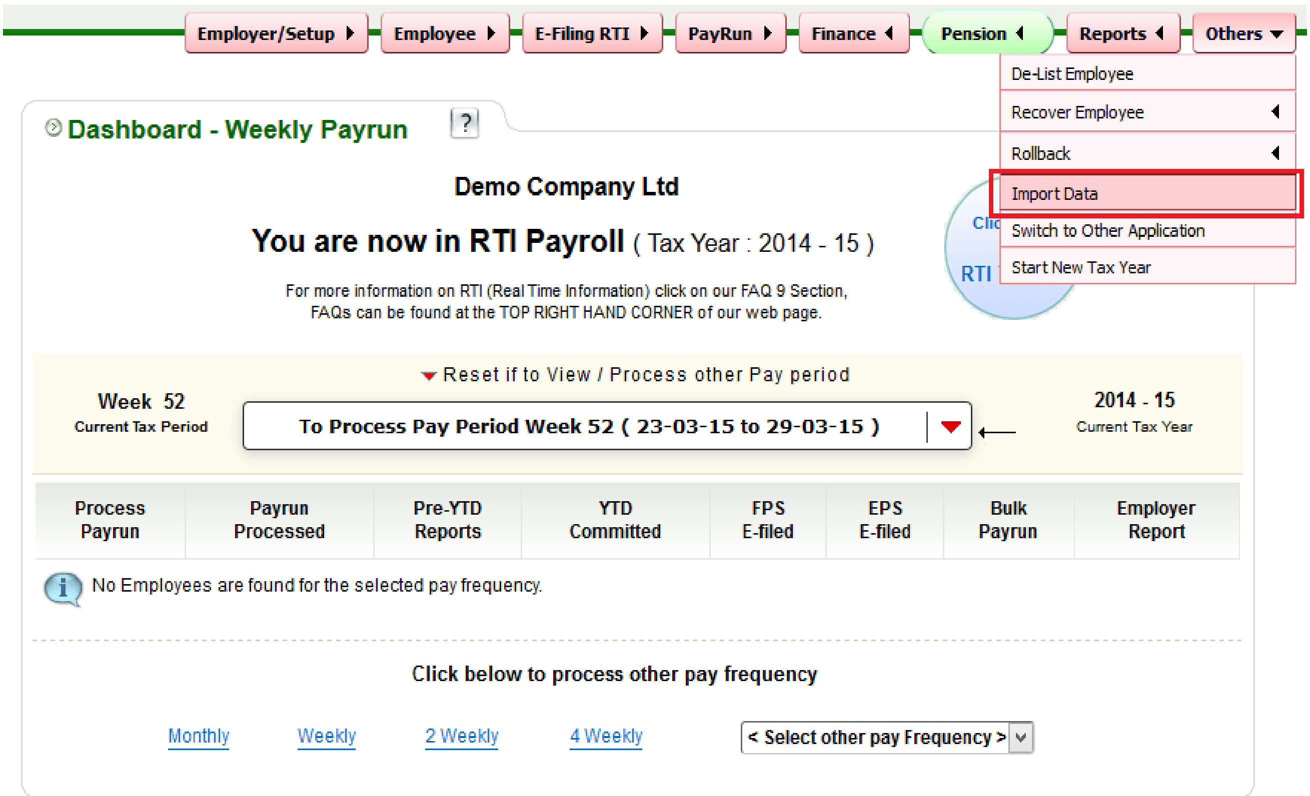


Fig 1.2.4 Bureau Import Data Option 2

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

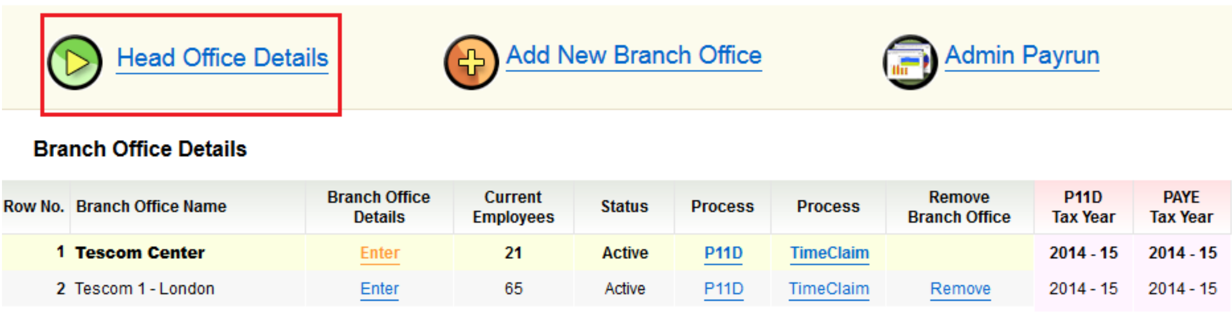


Fig 1.3.1 Head Office details

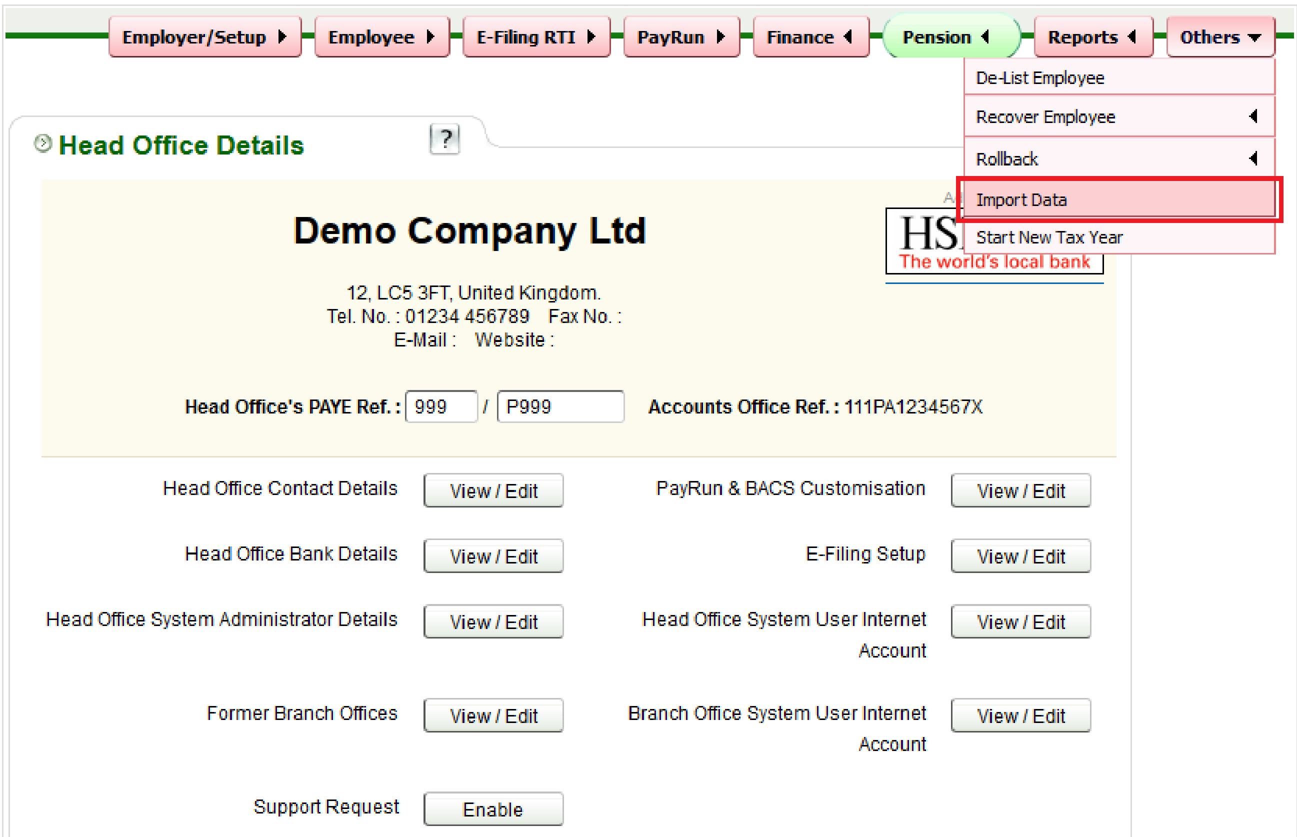


Fig 1.3.2 Multisites Import Data

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

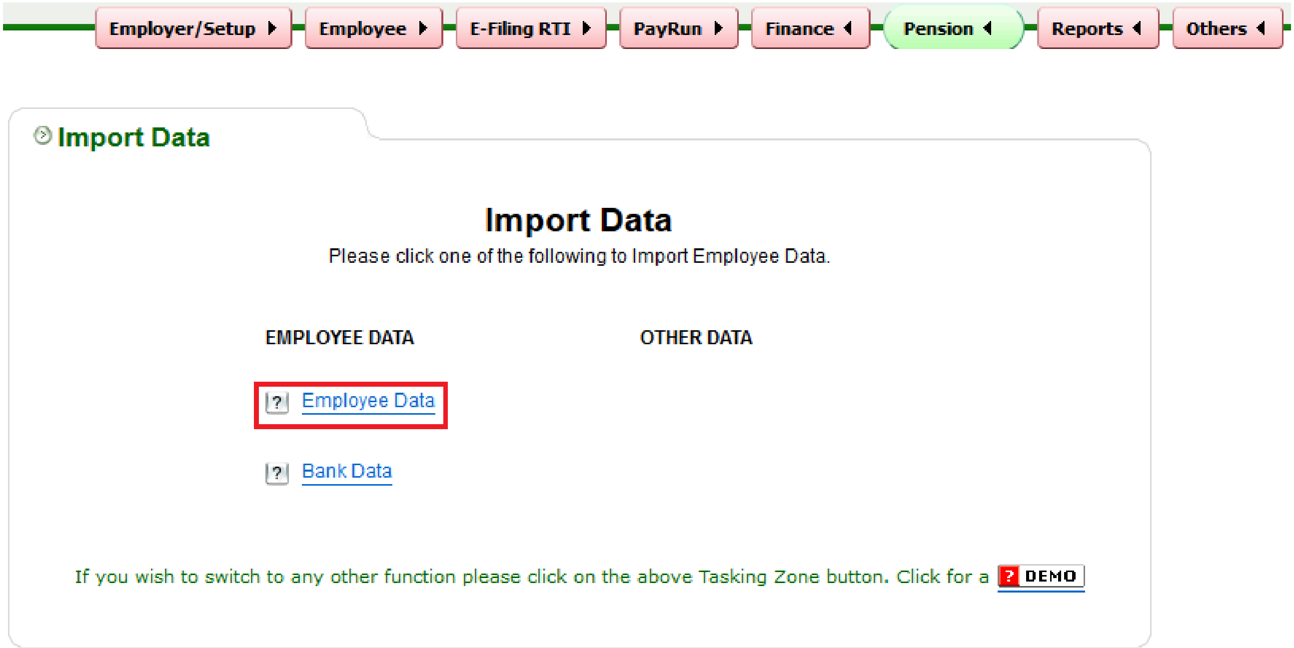


Fig 2.1 Import data

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**'

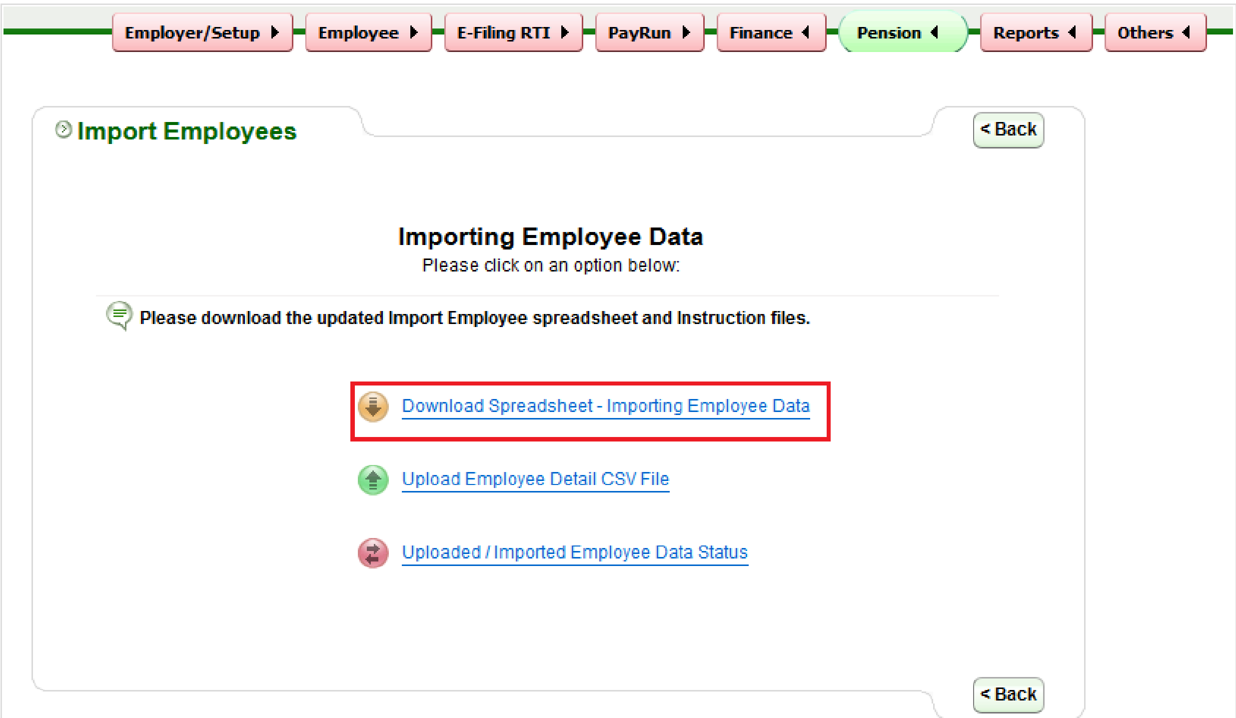


Fig 2.2 Importing Employee Data

Step 4: Select the employee template.

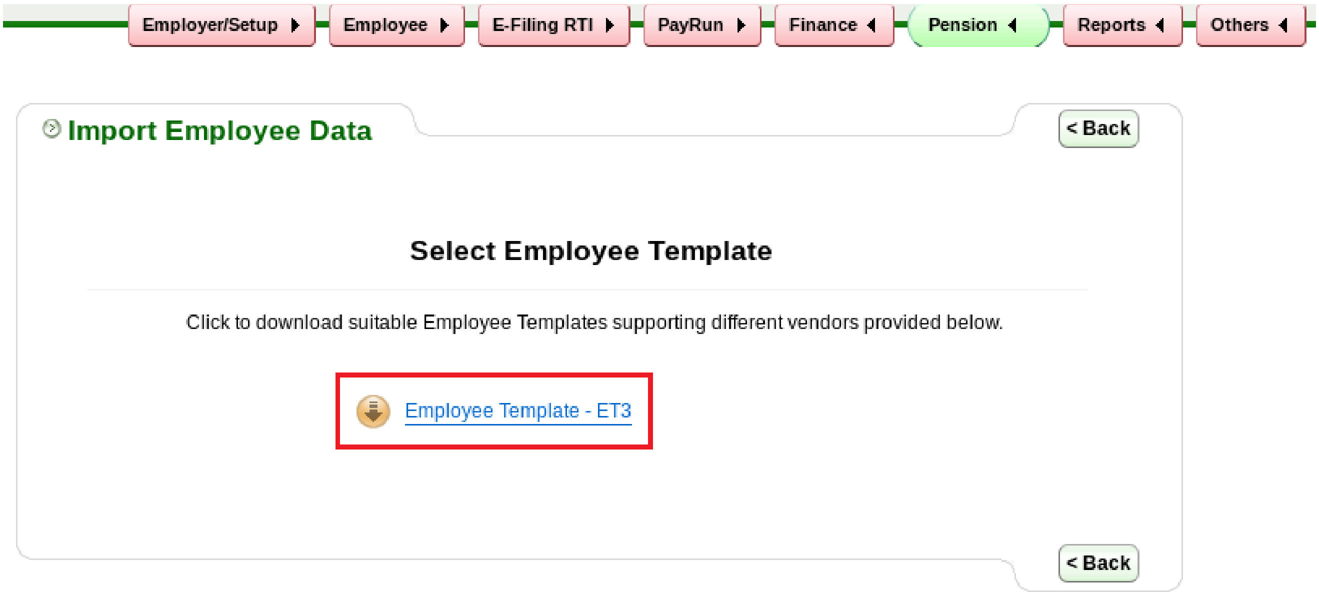


Fig 2.3 Employee Template

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.

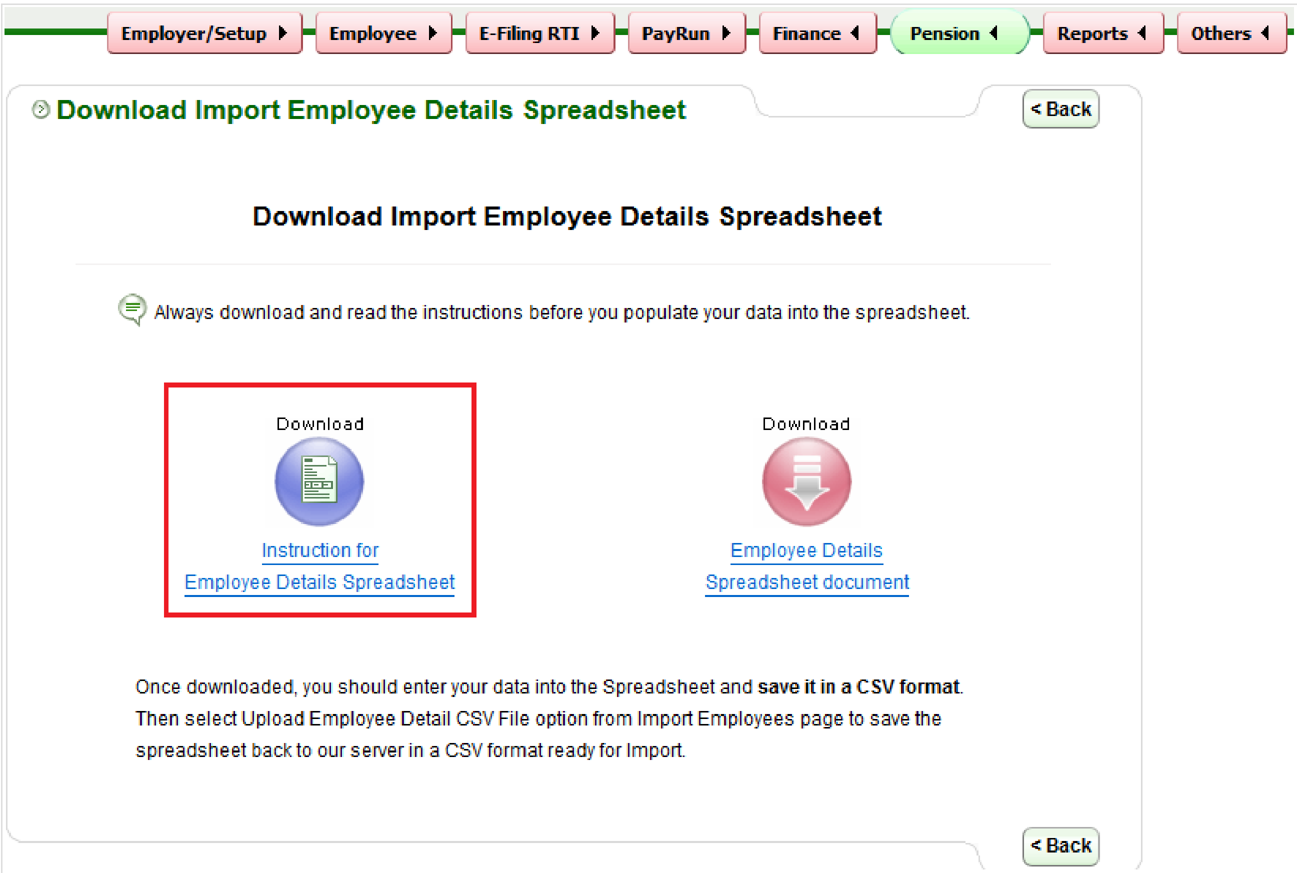


Fig 2.4 Download Instruction

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

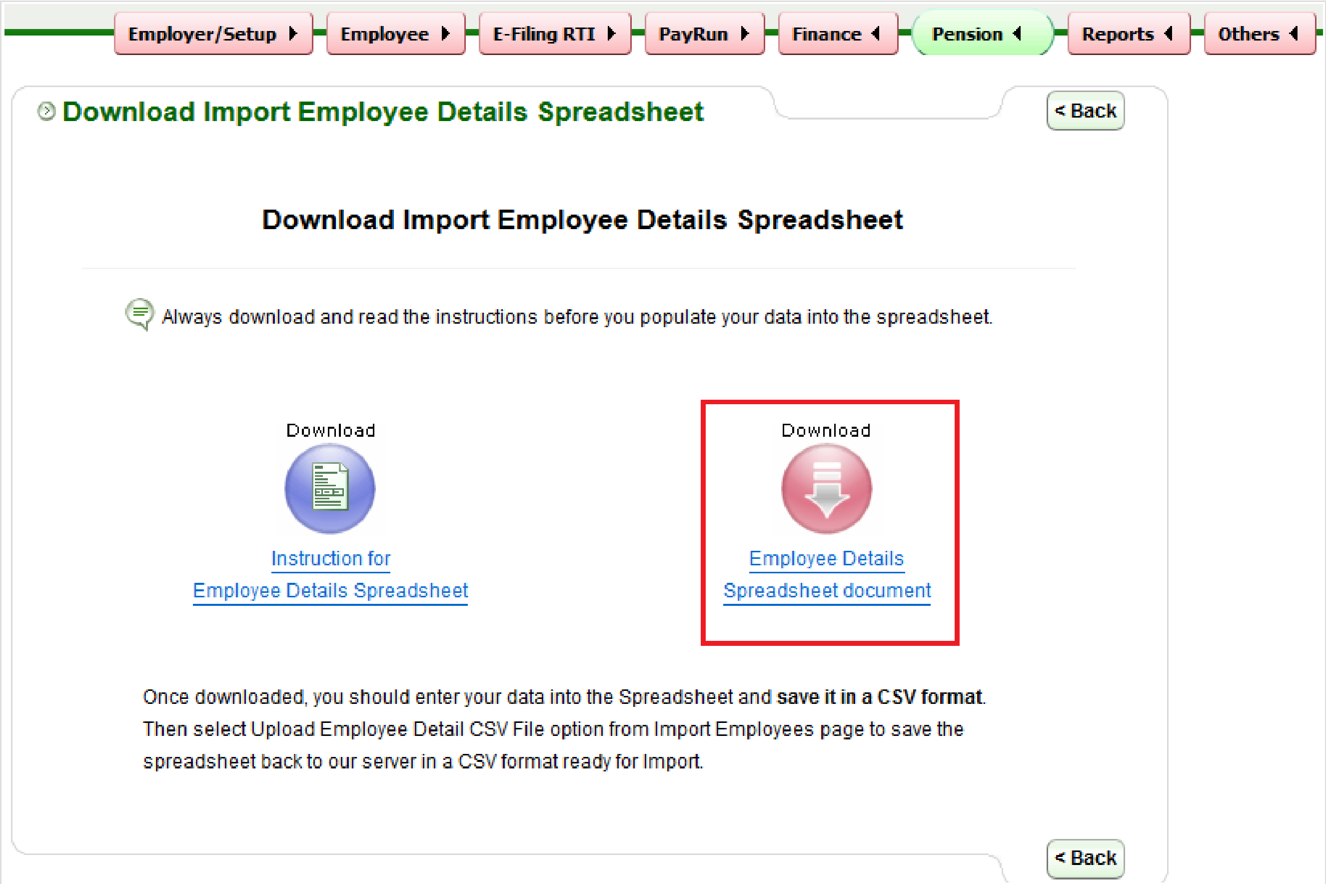
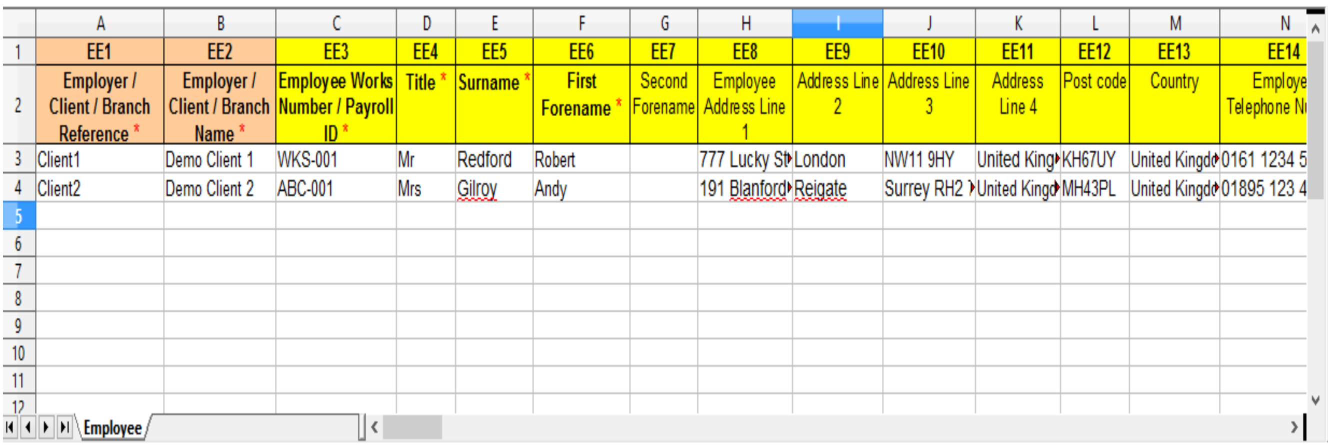


Fig 2.5 Download Spreadsheet

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	Employe Telephone N
3	Client1	Demo Client 1	WKS-001	Mr	Redford	Robert		777 Lucky St	London	NW11 9HY	United King	KH67UY	United Kingdo	0161 1234 5
4	Client2	Demo Client 2	ABC-001	Mrs	Gilroy	Andy		191 Blanford	Reigate	Surrey RH2	United King	MH43PL	United Kingdo	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

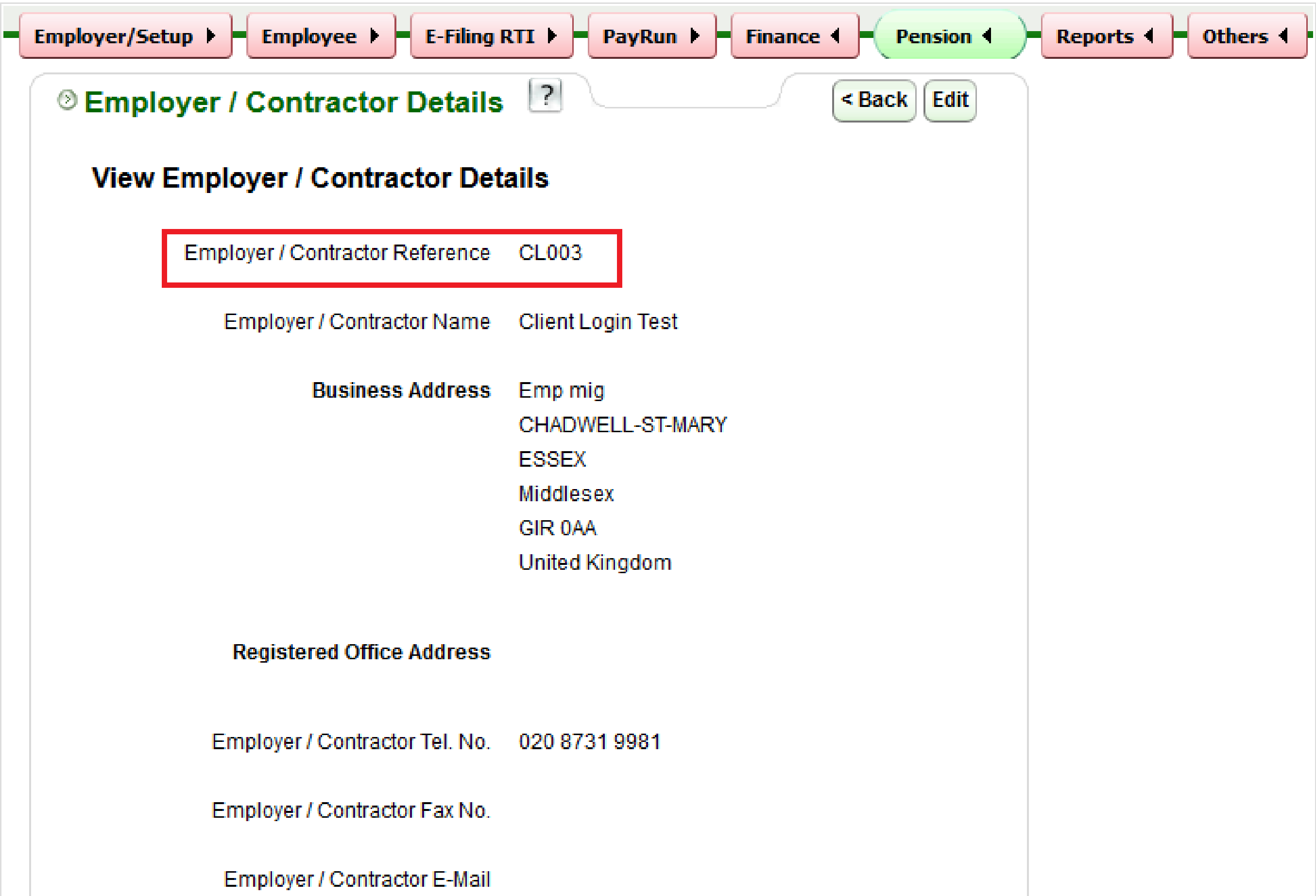


Fig 2.7 Employer / Contractor Reference

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'**.

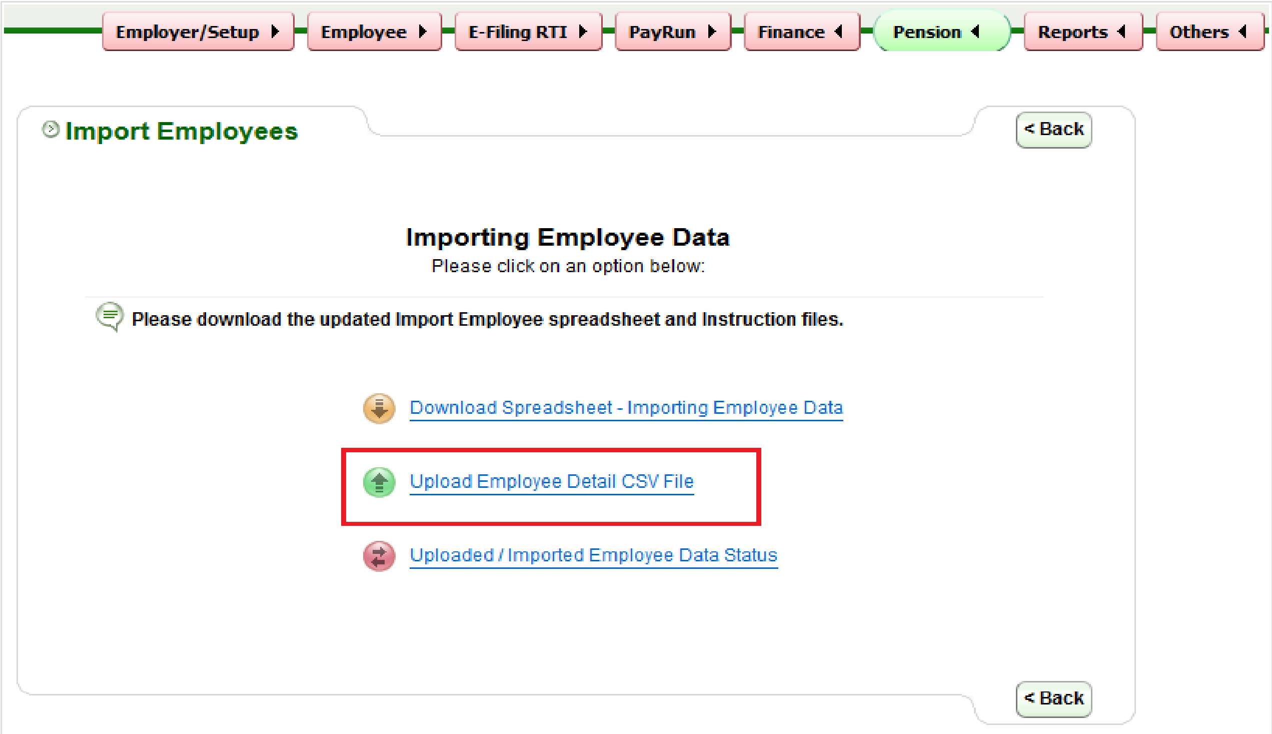


Fig 3.1 Upload employee detail CSV File

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.

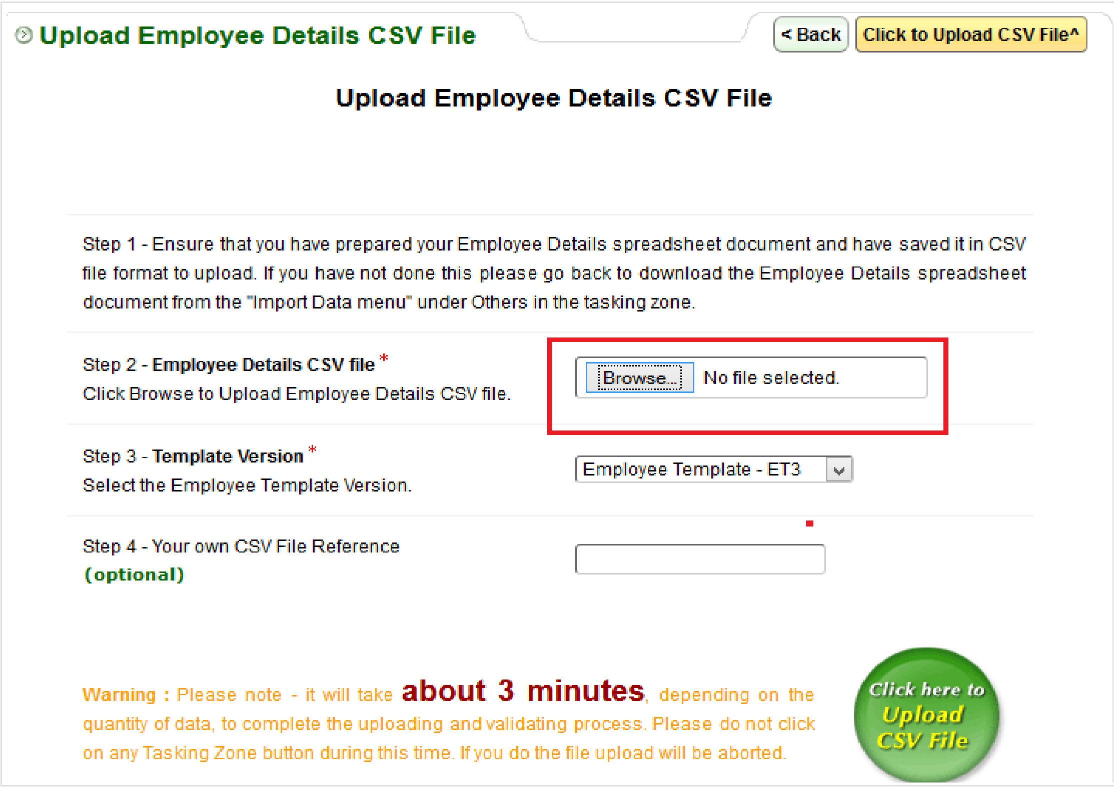
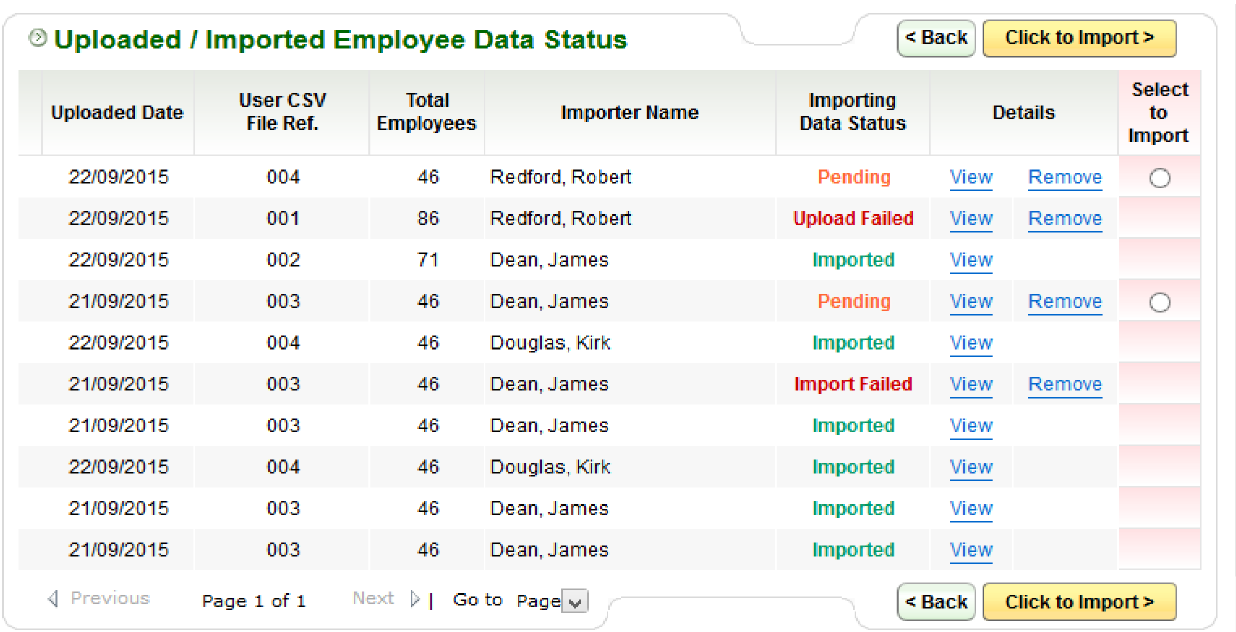


Fig 3.2: Upload CSV File

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 / Imported Employee Data Status

< Back | Click to Import >

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

Previous | Page 1 of 1 | Next | Go to Page | < Back | Click to Import >

Fig 3.3 Employee Data Status

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

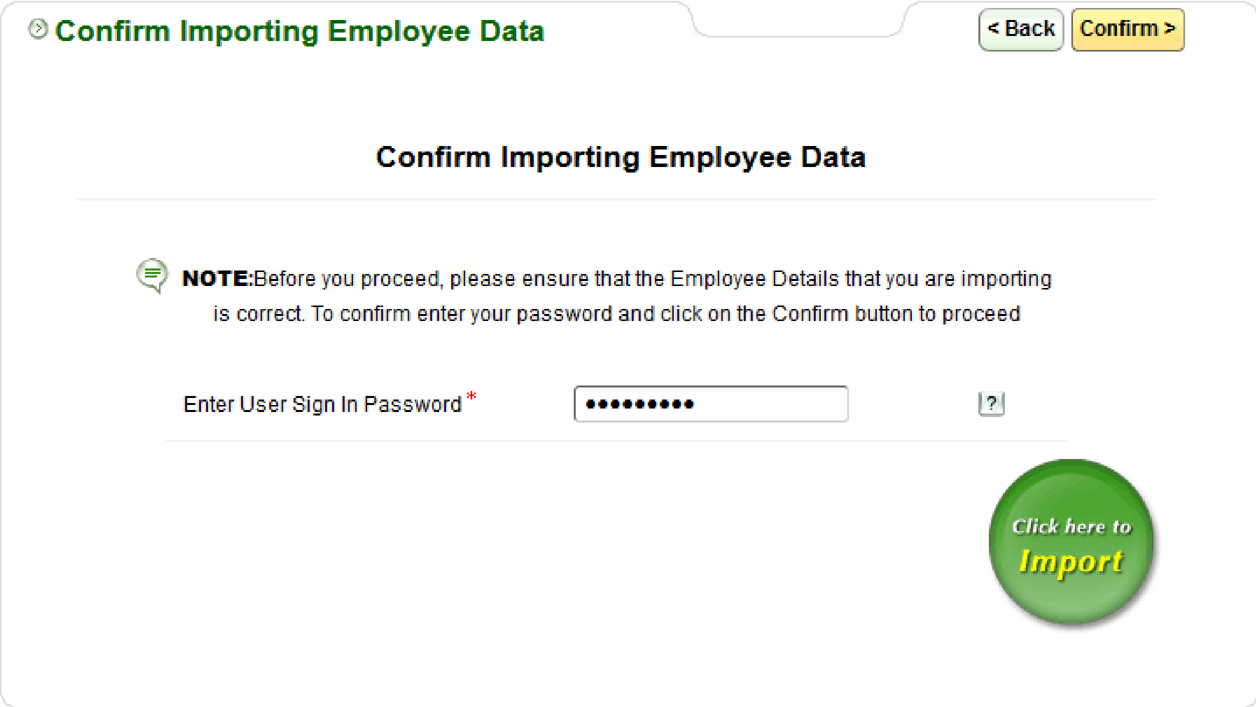


Fig 3.4 Confirm Importing

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

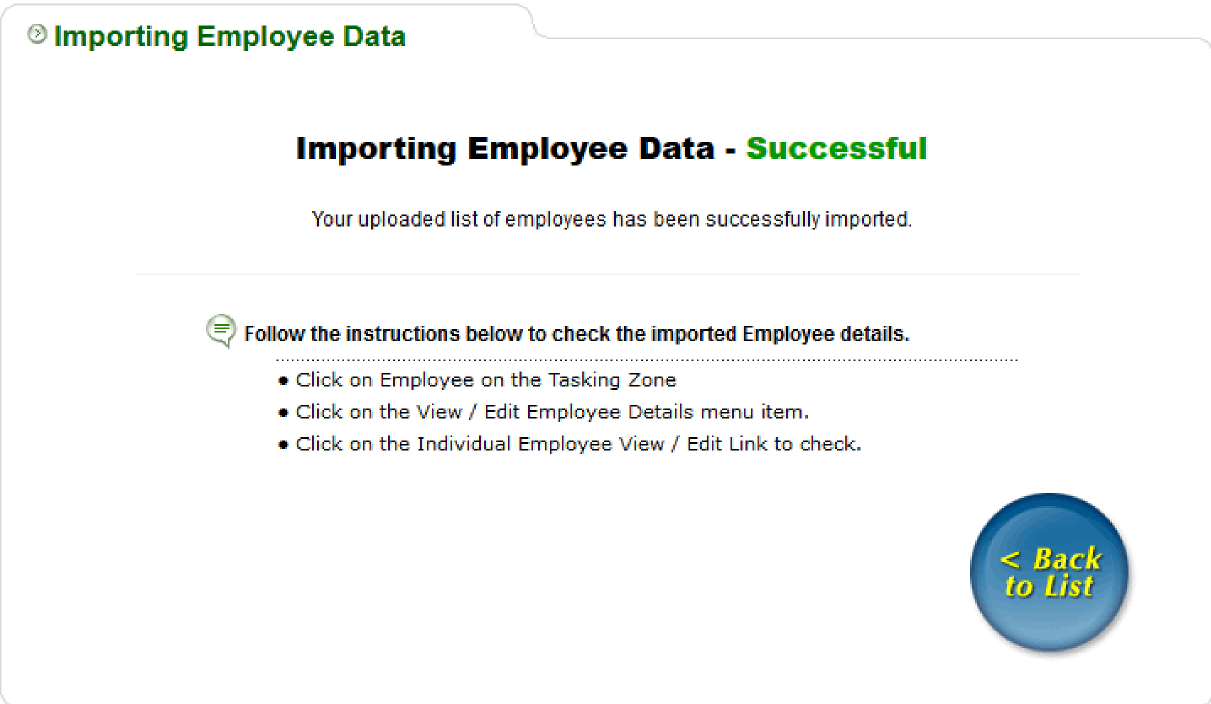


Fig 3.5 Successful Importing

Employee Login Demo

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

Please click on the below link to view the demo:

https://youtu.be/CksJ53D6byc

To Know More:

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

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