



# User Guide

***PLEASE READ THESE INSTRUCTIONS CAREFULLY BEFORE SETTING UP THE PAYROLL PORTAL***

The Payroll Portal is an online facility that allows payslips to be uploaded from Keytime Payroll direct to a secure website.

Each user will logon with a username (email address) and password following an initial registration and set up process. Full details of which are below, however, it is worth pointing out at this early stage that the following information **MUST** be contained within the employee record in Keytime Payroll before setup can be completed:

Date of Birth

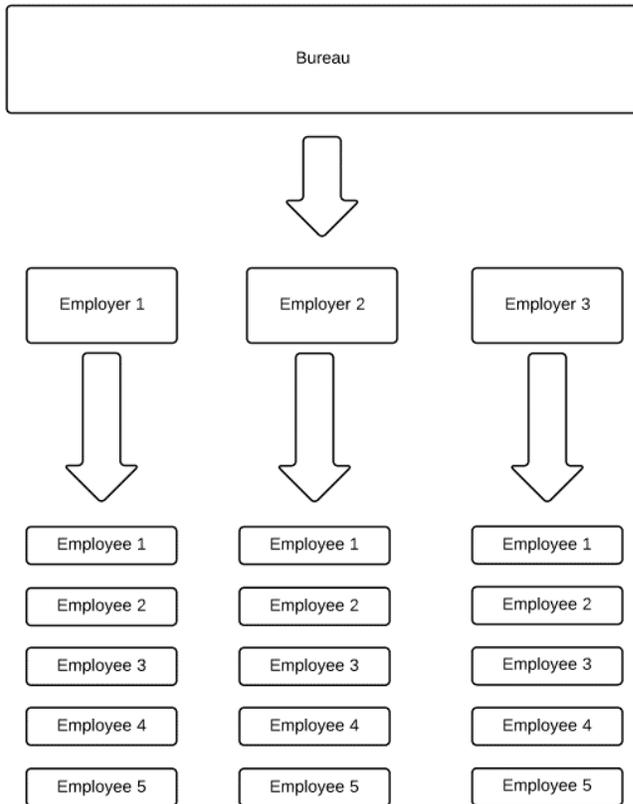
National Insurance Number

Email Address

This information allows each employee to be securely identified by the Payroll Portal

There is a strict hierarchy in place. If you act as a bureau or agent you will have secure login credentials which allow you to manage the employers that you act for and their employees.

Employers will **ONLY** have access to their employee payslips and in turn the employees will only have access to their **OWN** payslips.



## 1. Update Employee records

The first step in sending your payslips electronically to the Arithmo Payroll Portal is to add your employees email address to their employee record in Payroll.

Employee Information : Employee NumberONE

Personal Details | Financial Details | **Additional Details** | Pay Elements | Attachments

**Banking/Working Week** | Statutory Pay/Holidays

**Bank Details**

Account Type: <None> | Sort Code: <None > | Passport number:

Account Name:  | **Email Address:** email@test.com | Company Debit Account: <None >

Account Number:  | Building Soc. Roll No:

**Days Worked**  Days Worked will be used when calculating SSP and Holidays.

Sun  Mon  Tue  Wed  Thu  Fri  Sat  | Number of normal hours worked: a) Up to 15.99 hrs

If your employee is on paid leave, for example annual leave or sick leave, please report the normal hours worked. If you consider a, b, c or d are not appropriate then indicate e.

This Year		Next Year	
Bank Holidays Allowable: 0	Lieu Days: 0	Bank Holidays Allowable: 0	Bank Holidays Taken: 0
Bank Holidays Taken: 0	Lieu Days Taken: 0	Bank Holidays Taken: 0	

In addition to this you also **MUST** ensure that employees **date of birth** and **National Insurance** number are recorded correctly on the employee record.

## 2. Create Bureau/Agent User Account

If you operate as a payroll bureau or agent you will need to create a user account for your bureau on the portal.

This is created from within Payroll by clicking the **Company** menu / **Portal Setup**.

Ensure the **Bureau** option is chosen and then click **Setup**, enter the name of your firm or bureau and your email address to complete the registration:

Portal setup

Please select the type of portal account required

Bureau  
 Company

Portal setup

Please select the type of portal account required

Bureau  
 Company

**Portal Setup**

**Admin Details**

 Setup main registration on Portal

**Company details**

 Create company on the Portal

**Employee portal setup**

 Select and create employees on Portal

Print a list of employees and pin numbers

Tick here to display pin numbers on the payslip

Portal setup

Please select the type of portal account required

Bureau  
 Company

**Portal Setup**

**Admin Details**

 Setup main registration on Portal

**Company Setup**

Bureau/ Accountants Name

Email Address

**Employee portal setup**

 Select and create employees on Portal

Print a list of employees and pin numbers

Tick here to display pin numbers on the payslip

The portal will send an email to the address used during the setup process. The email will ask that you create a password and a profile.

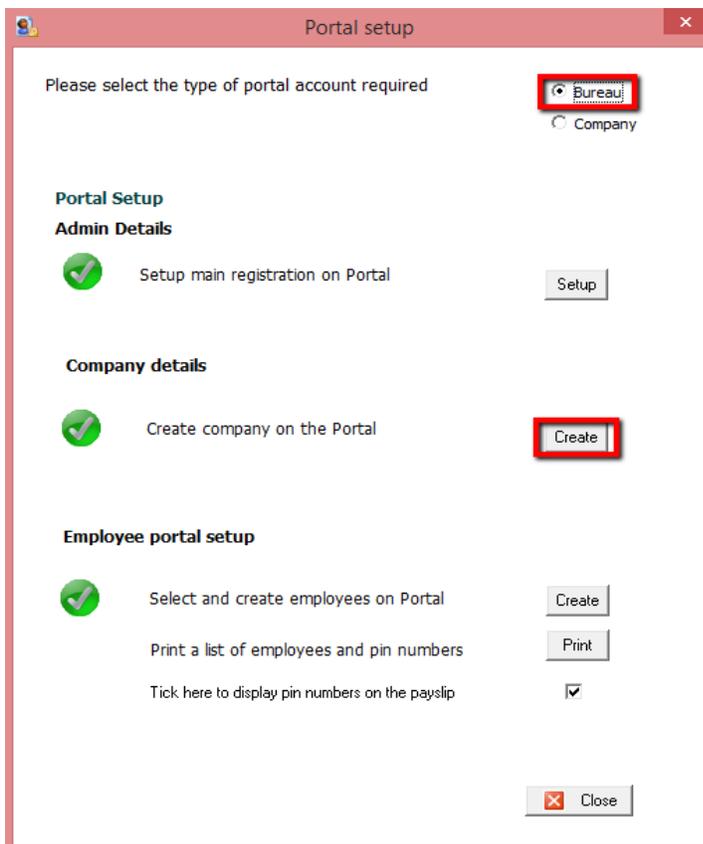
Click the link contained in the email to create the bureau profile, during this process you can also update the basic branding and add in your logo that will be displayed to all companies you manage and their employees.

Please note that each company can also brand the portal to add in their own logo and colours so that the employees see their employers' logo.

### **3. Create Employer (Company) User Account**

Return to Payroll and **Company / Portal Setup** if you are a bureau click the **Bureau** option (this links the employer to your bureau) and click the **Create** button.

**NOTE: IF YOU CHOOSE COMPANY (IN TYPE OF PORTAL ACCOUNT REQUIRED) AT THIS POINT THE COMPANY WILL BE CREATED ON THE PORTAL BUT IT WILL NOT BE LINKED TO YOUR BUREAU ACCOUNT**



The screenshot shows a window titled "Portal setup" with a close button in the top right corner. The main content area has a heading "Please select the type of portal account required" and two radio button options: "Bureau" (selected and highlighted with a red box) and "Company". Below this, there are three sections of setup tasks, each with a green checkmark icon and a button:

- Portal Setup**
  - Admin Details**
    - Setup main registration on Portal (Setup button)
  - Company details**
    - Create company on the Portal (Create button, highlighted with a red box)
  - Employee portal setup**
    - Select and create employees on Portal (Create button)
    - Print a list of employees and pin numbers (Print button)
    - Tick here to display pin numbers on the payslip (checked checkbox)

At the bottom right of the window is a "Close" button with a red 'X' icon.

Company Portal

Company Name  
Testco Limited

Email Address  
joe.bloggs@testco.com

Update on Portal Close

An email will be sent to the company (employer) asking them to create a password and profile that they can use to login to the portal. The main areas for consideration when creating this profile are:

- **Release Payslip Manually** - if this box is ticked any payslips uploaded will NOT be released to the employee automatically. Payslips will only be released when approved by.
- **Logo** - Any logo added here will replace the Arithmo logo. The maximum size of the logo is should be 60 pixels high. However the system will re-size any logo's larger than this.
- **Branding Colour** - You can change the colour of the green bar. To do this enter the Hex code of your colour and click **Choose**.

#### 4. Create Employee(s) User Accounts

The next step is to create the employee portal accounts. Again this is done via **Company / Portal Setup**. Ensure the Company option is chosen and click **Create Employees on Portal**

Portal setup

Please select the type of portal account required

Bureau  
 Company

**Company details**

Create company on the Portal

**Employee portal setup**

Select and create employees on Portal

Print a list of employees and pin numbers

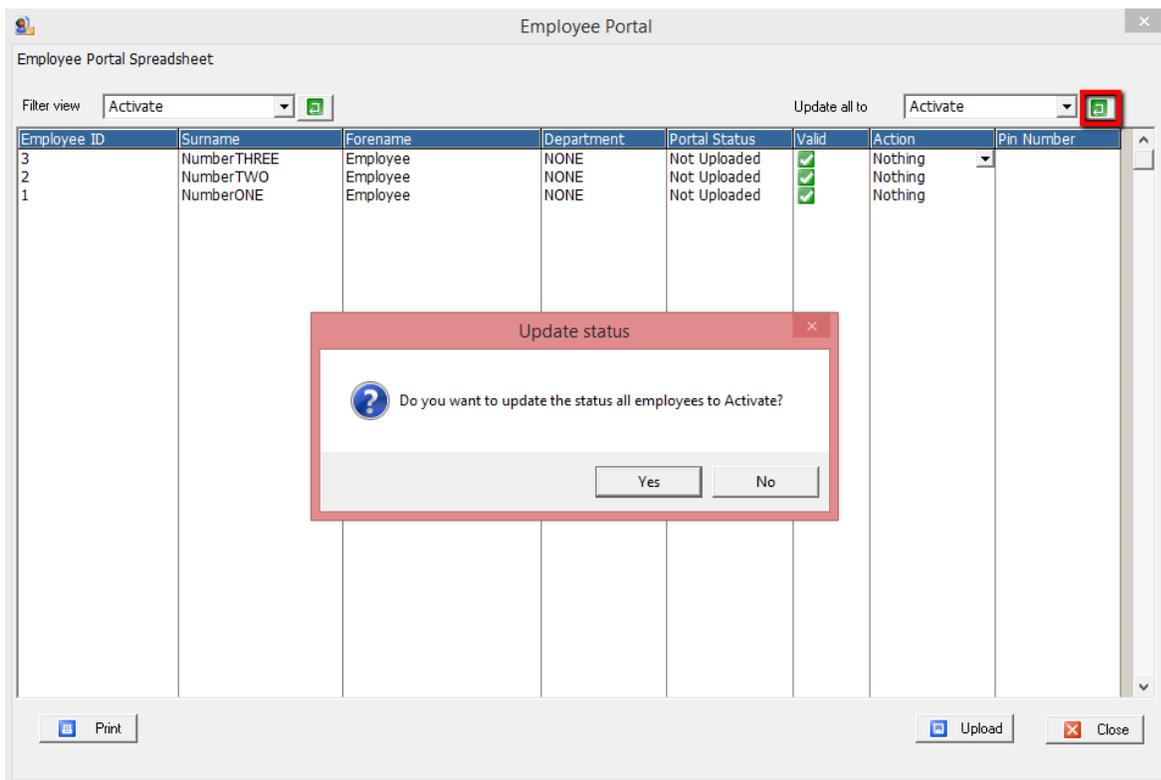
Tick here to display pin numbers on the payslip

You can either bulk activate the employees or upload them individually.

If you change the filter in the top right hand corner of the screen to **Activate** and click the green button as indicated the action status will be set to activate for all employees.

Following this click the **Upload button**. All employees with valid email addresses will be set up on the portal.

If you want to activate individual employees you can change the Action to Activate line by line, again clicking upload to create the accounts.



Once the employee Portal accounts have been created, the Portal Status will show as Activated and a unique PIN Number will be displayed.

The employee will need this PIN number to successfully activate their account.

Employee ID	Surname	Forename	Department	Portal Status	Valid	Action	Pin Number
5	Howarth	Neal	NONE	Activated	✓	Nothing	7761571330
4	EmployeeFOUR	Number	NONE	Activated	✓	Nothing	5873226241
3	NumberTHREE	Employee	NONE	Activated	✓	Nothing	4639762213
2	NumberTWO	Employee	NONE	Activated	✓	Nothing	9247716880
1	NumberONE	Employee	NONE	Activated	✓	Nothing	5549876892

Each employee will be sent an email requesting that they complete the registration process. As part of this process the employee will have to enter their:

1. Client ID - this will be included within the registration email
2. Date of Birth
3. National Insurance Number
4. Unique PIN code

If any of these details do not match the payroll record then they employee will **NOT** be able to complete the registration process.

The unique PIN code can be added to the employee payslip by selecting the option in Portal Setup. If you prefer to write to employees individually you can produce a report with detailing each employee and their PIN code.

Portal setup

Please select the type of portal account required

Bureau  
 Company

**Company details**

Create company on the Portal

**Employee portal setup**

Select and create employees on Portal

Print a list of employees and pin numbers

Tick here to display pin numbers on the payslip

**PLEASE NOTE THAT YOU WILL NEED TO PROVIDE YOUR EMPLOYEES WITH THEIR PIN NUMBER 1 PAY PERIOD BEFORE YOU WISH TO REPLACE E-PAYSLIPS OR PAPER PAYSLIPS. THIS ENSURES THE PIN NUMBER IS AVAILABLE FOR THE EMPLOYEES TO COMPLETE THEIR REGISTRATION PROCESS.**

## 5. Uploading Payslips To The Portal

Once the setup is complete payslips can then be uploaded to the portal. This is done in **Calculate** by selecting the employees as below and clicking the **Portal** Button

The screenshot shows the 'Calculate Pay' software interface. The top toolbar contains several buttons: Back, Forward, Add, Save, Delete, Print, and Portal. The 'Portal' button is highlighted with a red box. The main window displays 'Calculate Pay : Employee NumberTWO' with a 'Payslip' tab selected. The payslip details include:

Pay Details				Payslip					
No.	2	Name	NumberTWO, Employee	Tax Code	1000L	National Insurance Code	NW025885B	Department	NONE
Period	1	Date	30/04/2015						
Payment	Qty.	Units	Amount	Adjustments	Qty.	Units	Amount		
Basic Monthly	0	£	£2,000.00	Employee NI	0	£	£159.36		
				Employee Pension	0	£	£15.14		
				Tax Payment	0	£	£233.00		
<b>Total</b>			<b>£2,000.00</b>	<b>Total</b>			<b>£407.50</b>		
YTD Gross	£2,000.00	YTD Pension	£15.14	Gross Pay	£2,000.00				
YTD Taxable	£2,000.00	YTD Savings	£0.00	Taxable	£2,000.00				
YTD Tax	£233.00	Loans O/S	£0.00	Nilable Pay	£2,000.00	<b>NET PAY</b>	<b>£1,592.50</b>		

The screenshot shows the same 'Calculate Pay' software interface as above, but with a 'Portal Upload' dialog box overlaid. The dialog box contains the following text:

Do you want to upload the selected employees payslips to the portal?

Yes No

The 'Yes' button is highlighted with a red box. The background payslip details are visible but partially obscured by the dialog box.

Once the payslips have been uploaded to the Portal the employees will receive an email advising them **UNLESS** the **Release Payslip Manually** box is ticked in the company profile page.

When payslips are uploaded the Company (employer) will be sent an email advising them that there are payslips to review and release to the employees. These can be reviewed and released by logging in at [www.arithmoportal.co.uk/login](http://www.arithmoportal.co.uk/login)

View As:  

### Payroll Batches Awaiting Release

You currently have 1 payroll batches awaiting release:

**Payslip Month 1-2015-2016 (17 Payslips)**

[View Payslips](#) [Release Now](#)  [Release On Date](#)

Fiona Barnes	Ronnie Graham	Malcolm Kent	Charlie Eles
Deborah Jenkins	Matthew Heskel	Adam Hopcroft	Octavian Goga

Before releasing the payslips there is the option to **View Payslips**. Clicking this produces a single PDF containing all payslips in the batch.

The **Release Now** button will make the payslips available to the employees and send an email notification advising each employee.

You can also choose a date when the payslips are made available to the employees. Enter a date in the white box and click **Release on Date**. On the chosen date the payslips will be released for viewing, again an email notification will be sent to all employees.