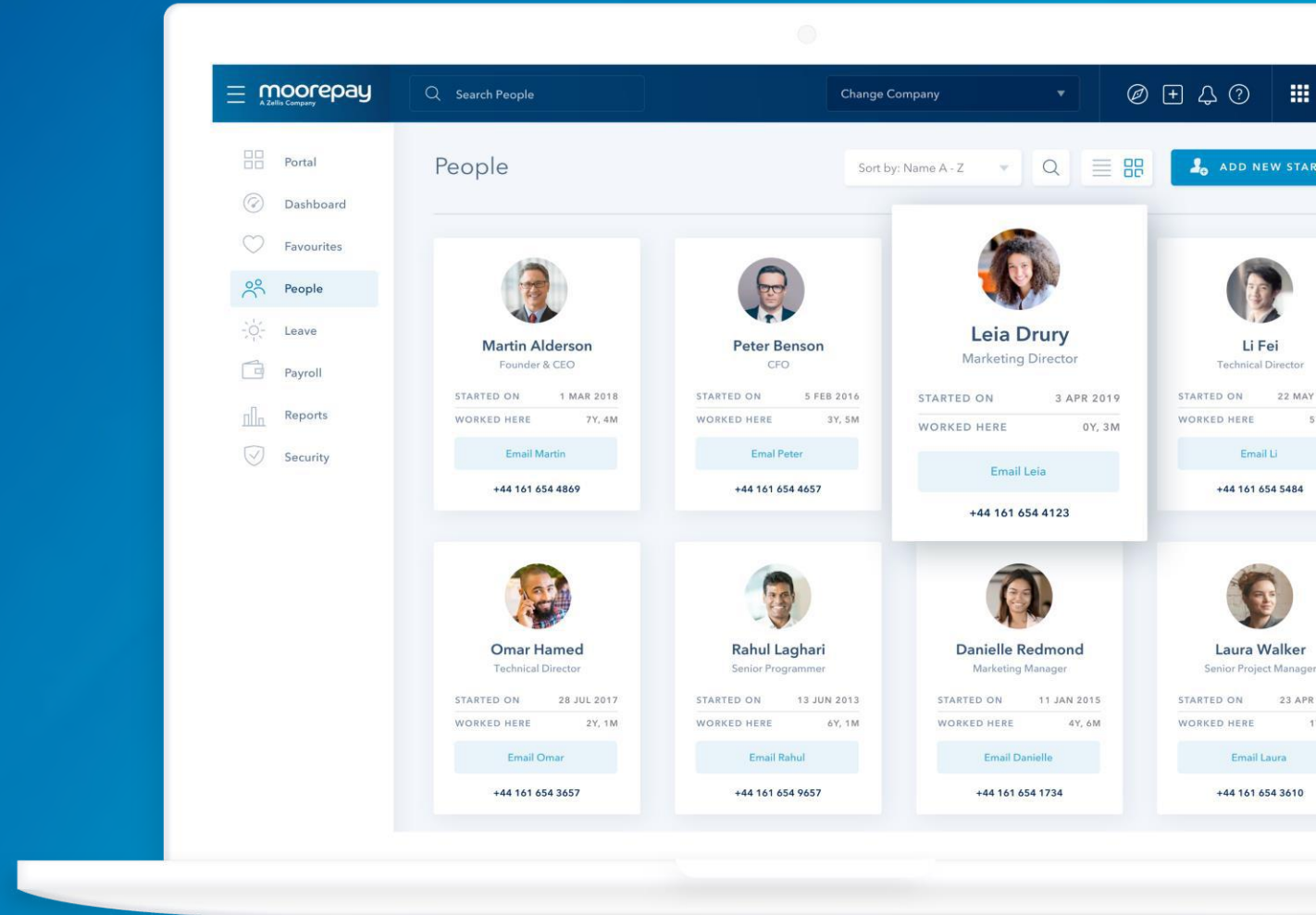


Your Next Generation Payroll & HR Solution

The upgrade process &
important information

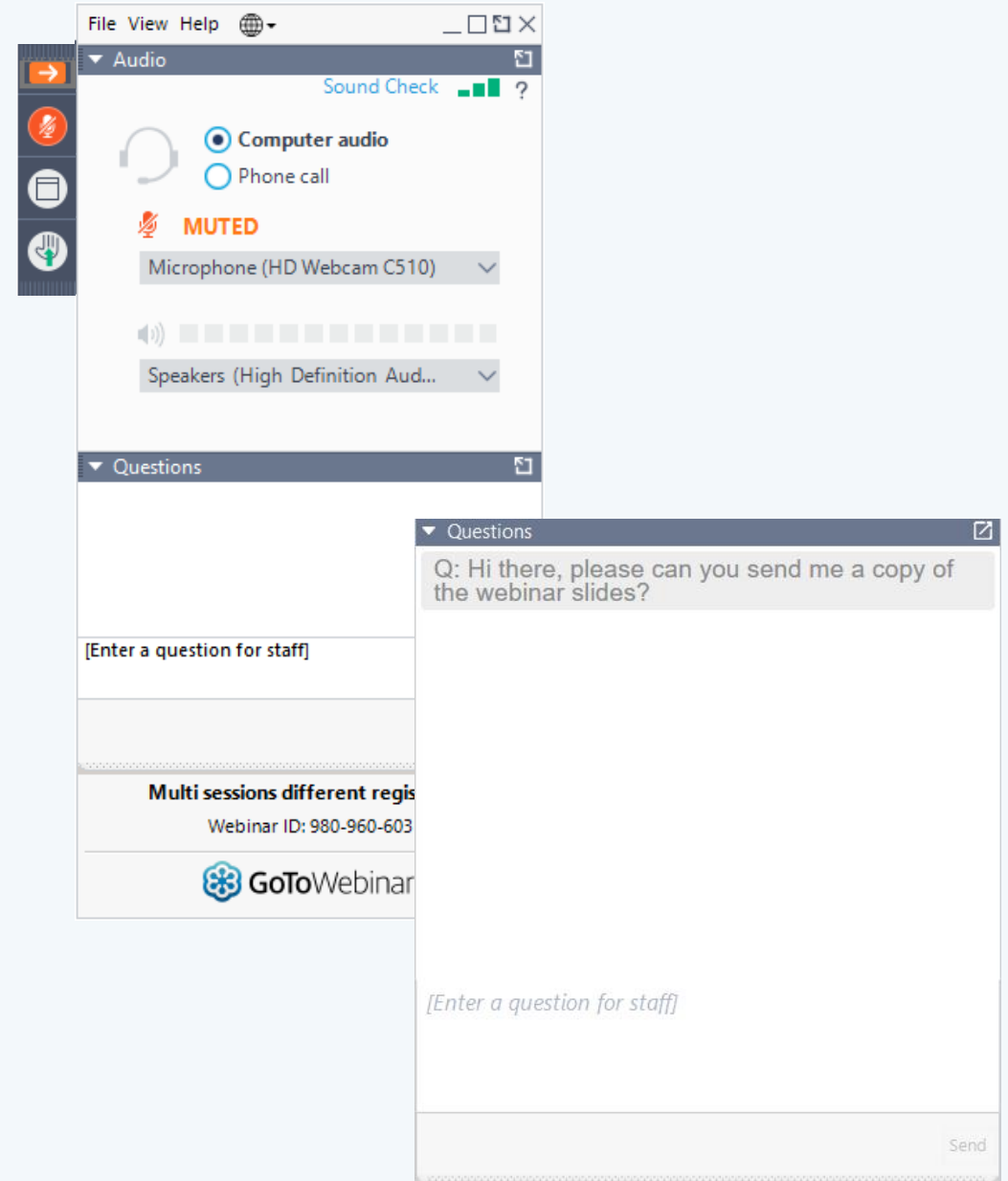


How to ask a question

To ask our expert a question, please use the Go To Webinar question panel.

We'll break after each section to review questions. We'll also allow some time at the end of the session.

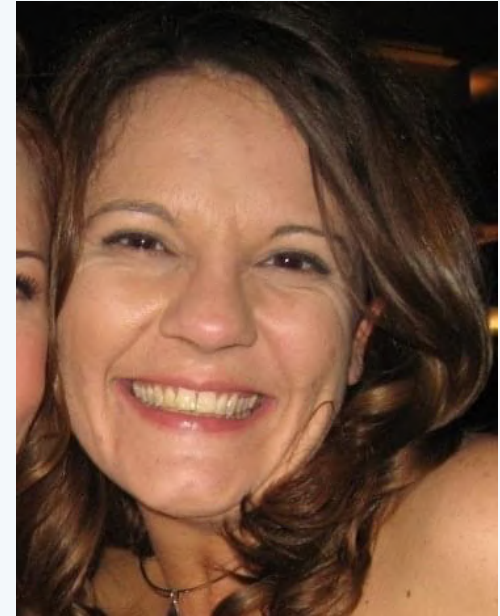
Don't worry if you're facing technical difficulties – we'll send everyone the recording.



Meet your presenter

Lauren Castellari Project Manager

- Over 10 years in Project Management
- Prince2 Practitioner certification
- Extensive experience in digital business transformation



Lauren.castellari@moorepay.co.uk

Meet your presenter

Sara Wilson

Business Transformation Programme Manager

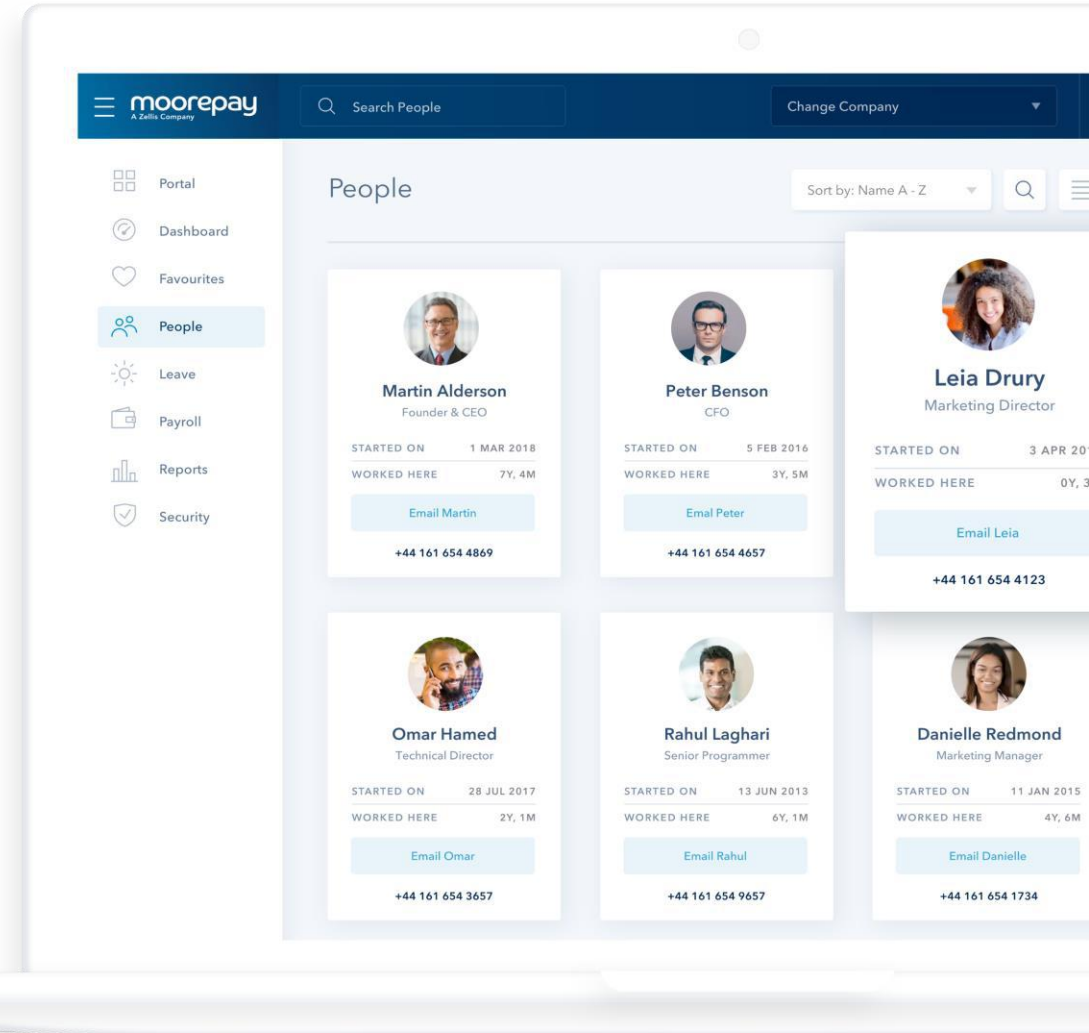
- Over 8 years' experience at Moorepay
- Upgraded over 150 Moorepay customers
- Overseen the transition of 30,850 employees



Sara.wilson@moorepay.co.uk

Application overview

- Our Next Generation Software looks a little different. However, the payroll engine remains the same. It is just the front end interface that has changed.
- The front end application is hosted in the Microsoft Azure Cloud. therefore like other software it runs on **sessions**, and sessions time out. You may find that you need to refresh, clear your cache, log out and login a little more often.
- Next Generation navigation is driven by **people**, rather than processes, but the payroll processes remain the same.
- Next Generation introduces **dashboards**, and tiles to navigate through the application.
- Next Generation makes some of the previously available functionality more visible such as the **phonebook**, **celebrations** and **employees away today** to all users.
- As we're asking all users to login, they are spending longer in the application, reviewing their data and often asking more questions.



The upgrade process

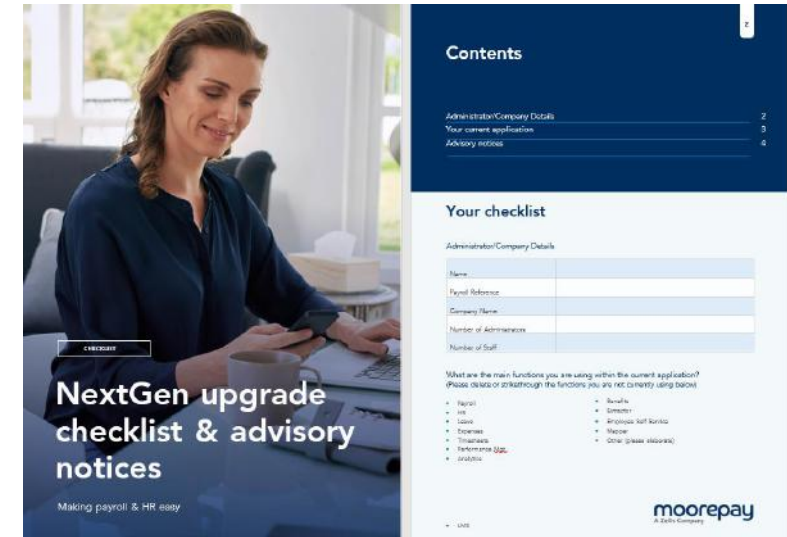
Pre-
planning

Upgrade
day

Important
Information

Pre-planning

- Client to review pre-upgrade documentation sent from our onboarding team (after contract received).
- Client to review and return upgrade checklist.
- Client to confirm payroll processing schedule, please note we are unable to upgrade a client during the processing cycle (ie between lockdown and cleardown). From this information Moorepay will confirm a proposed upgrade date.
- Client to review Security levels, Org Units and Profiles pre the upgrade.
- Client to download and save any previous period reports required.
- Client to ensure that personal email addresses/user names are in the personal address field.
- Clients to make employees aware of the login instructions pre the upgrade date.
- Clients to ensure that emails from moorepay.co.uk are whitelisted by their IT application.
- Upgrade team to review any database requirements and outstanding account cases which may inform upgrade date.



NextGen upgrade checklist & advisory notices
Making payroll & HR easy

Contents

Administrator/Company Details	2
Your current application	3
Advisory notices	4

Your checklist

Administrator/Company Details

Name	
Payroll Reference	
Company Name	
Number of Administrators	
Number of Staff	

What are the main functions you are using within the current application?
(Please check or tick/through the functions you are not currently using below)

- Payroll - HR - Leave - Timecards - Performance - Analysis	- Benefits - Compass - Employee Self Service - Mobile - Other (please list below)
--	---

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A BDO Company

Your current application

What functions do you currently have access to?

Do you have access to multiple databases/accounts?	YES/NO
Do your staff have any access to the Mobile Application?	YES/NO
Will you staff be downloading the Mobile Application?	YES/NO
Do you use and import spreadsheets (If yes do you import via CSV, Timestream, Mopper or Full Timesheet)?	YES/NO
Do you have Inpage profiles	YES/NO
Do you have a company ID (HR only records that are not paid via the payroll)	YES/NO
Do you have a logo on your current payroll p/s	YES/NO
Do you have a theme on your current application	YES/NO
Do you have Inpage reports, user folders or staff board access	YES/NO

Preupgrade questions & actions required

Do you maintain HR only records in your company?	YES/NO
Do you maintain your profiles, positions and salaries?	YES/NO
Do you use personal email addresses to communicate with your staff?	YES/NO
Do you have any active users on the current application?	YES/NO

Advisory notices
Please review these advisory notices and sign to confirm that you are aware of these items.

1. Login
All users will be required to verify their email address, valid password and sign in immediately following the upgrade. Access to the system will be granted only if the email address is verified. If you are currently using the system, you will be notified via email to verify your email address. If you are not currently using the system, you will be notified via email to verify your email address.

2. Payroll reports
Reports will now show as separate pages. A standard report will be available by the end of the day. Please note that reports will not be available via your upgrade email. The standard reports to download and save your reports ahead of the upgrade.

3. Equal opportunities data
Equal opportunities information will be visible in standard manager profiles, as it is in HRMS, a full profile view is not available.

4. Backup user
Please note that the main user window is likely to be the standard manager profile in a HRMS. If you have managed to use the system and are not going to manage for the day of the upgrade, this access will be valid for those changes. If you do not want your managers to be able to have visibility of the main pay window and statements, please contact your upgrade team to ensure that you have the correct access.

5. User profiles
Ahead of your upgrade it is important that you understand and review your User and Security Profiles. Validity of data and access will be affected to dependent upon the profile which

6. Personal email addresses
Personal email addresses in the personal email address field will not be visible to them. However, if your organisation uses personal email addresses and they are currently used in the business email field, these will be visible after the upgrade from the phone book functionality.

7. Contact details
Contact details and notes are currently available in those managed with a standard profile for their team members in HRMS.

8. Phone book
If you have chosen to use personal email addresses in a business address field, this information will be visible in the phone book. If you do not use the information to be visible, please ensure that no personal email addresses are in the business email address field. As an administrator, you are enabled to select 'Phone book functionality' on or off.

9. Security
Please note that if you have not removed default user security profiles, they may still have access to their payroll information. If you do not want to have access to the system, please remove their user security profile access.

10. Training
You should be provided with a training to support your upgrade payroll & HR software. Please note that you complete the training prior to the upgrade as there are changes to some screens which may affect the way in which you use the software.

I confirm that I have read the advisory notices and will complete any actions prior to my upgrade date.

Name	John Doe
Date	20th June
Signature	

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Next generation eLearning

eLearning - Changes Overview

Although the main processes within the software remain the same you will note that there are some changes to screens and the presentation of information and reports. It is essential for you to review the changes eLearning which shows these in more detail in addition to an Admin Guide which will follow this initial communication.

- Changes - https://rise.articulate.com/share/CD90JEIzS_sWpwyoyLLEqju9t2jJI6BX
- Software - <https://rise.articulate.com/share/1jA3J3ziPi3Wog33zxUKL0CIn4ztmW25>
- HR - <https://rise.articulate.com/share/MQOK6oudroJHdCDKpyfeTpHsLN0HxhRI>

eLearning – Managed Service

Please make every effort to complete the eLearning prior to your upgrade to ensure that you understand the changes between the two solutions.

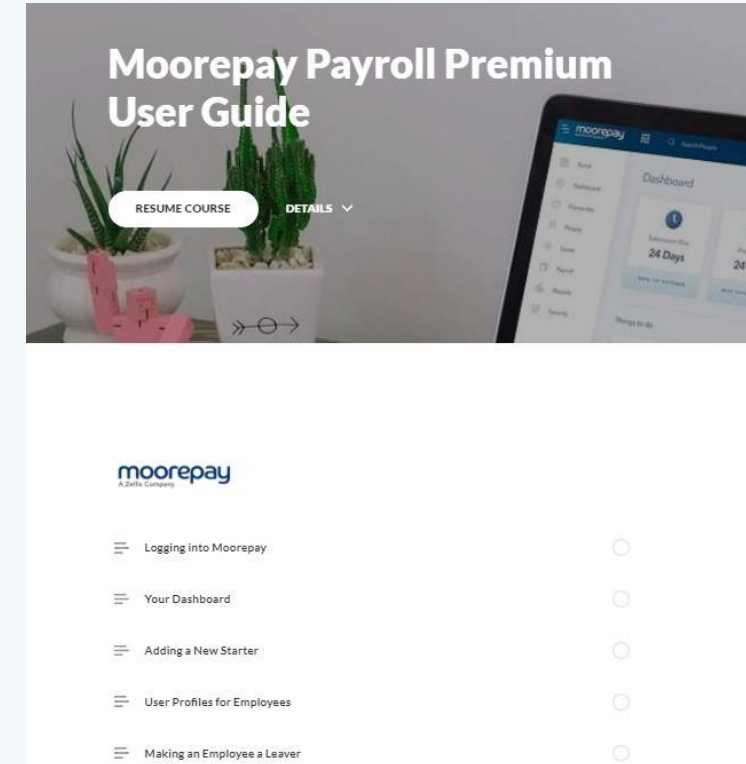
- User guide - <https://rise.articulate.com/share/OKP2kzFxFOho6D80aAr15-QVOomoywuQ>
- Full course - https://rise.articulate.com/share/g5GtJJU1RNWTEsz1qtbuGW_VHWLbPzm8

eLearning – Software

- Software only - https://rise.articulate.com/share/pkXYIoK_wb6KPTmo1-q8awvqiq7hnK7F
- Software Premium - <https://rise.articulate.com/share/G84M6rBoJREWvNE29hQD4ssFnuY21NMP>

eLearning – Other

- HR - <https://rise.articulate.com/share/m2ttta-6XfUfhE3-XFIWfQoWmwbwtD2w>
- Employee App - <https://rise.articulate.com/share/8jtM6bZFbpxfsVKq-lieWQZK3WyEVqxj>



Next generation guides

Admin guide

- Login
- Changes
- Reviewing reports

Admin Mobile App Guide

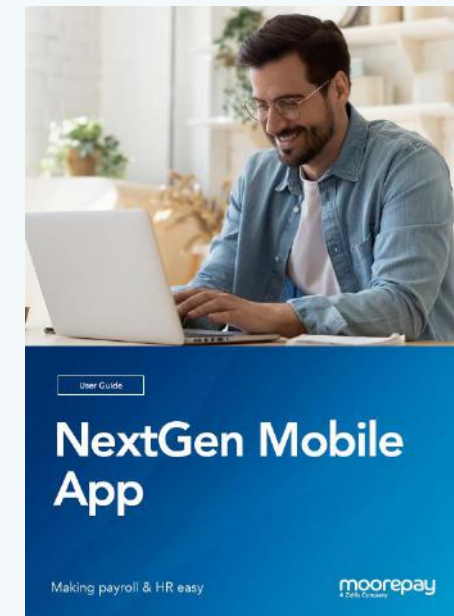
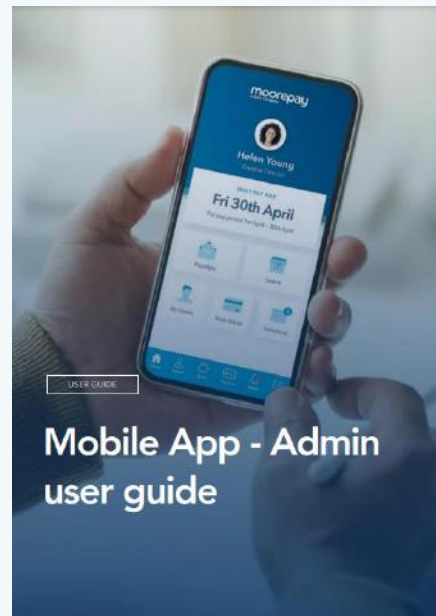
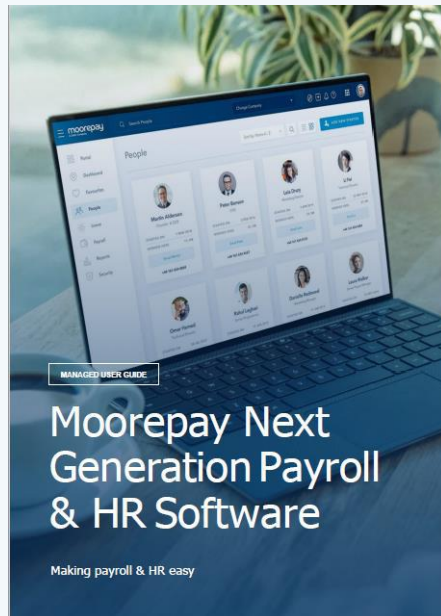
- Submission
- Personal details
- Manager authorisation

Employee guide

- Login
- Review payslips
- Downloading the mobile app
- Privacy

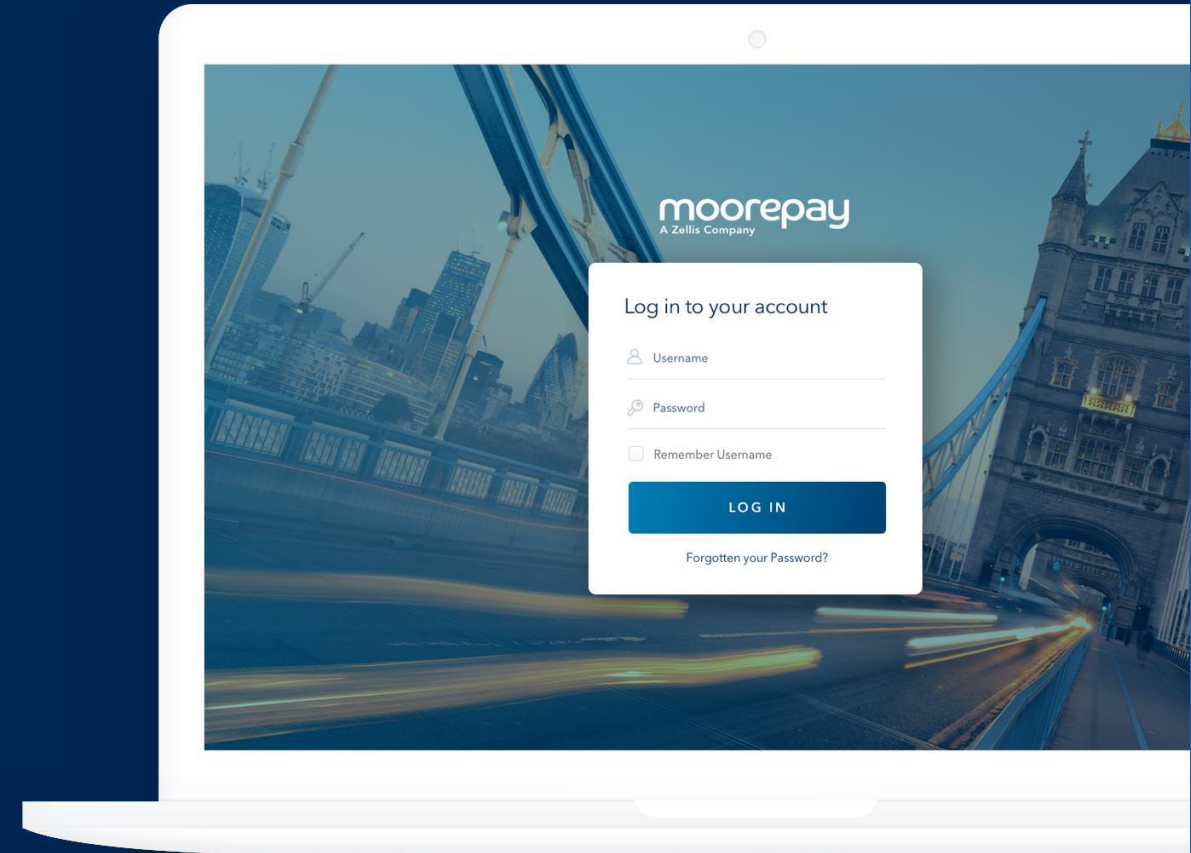
Employee Mobile App guide

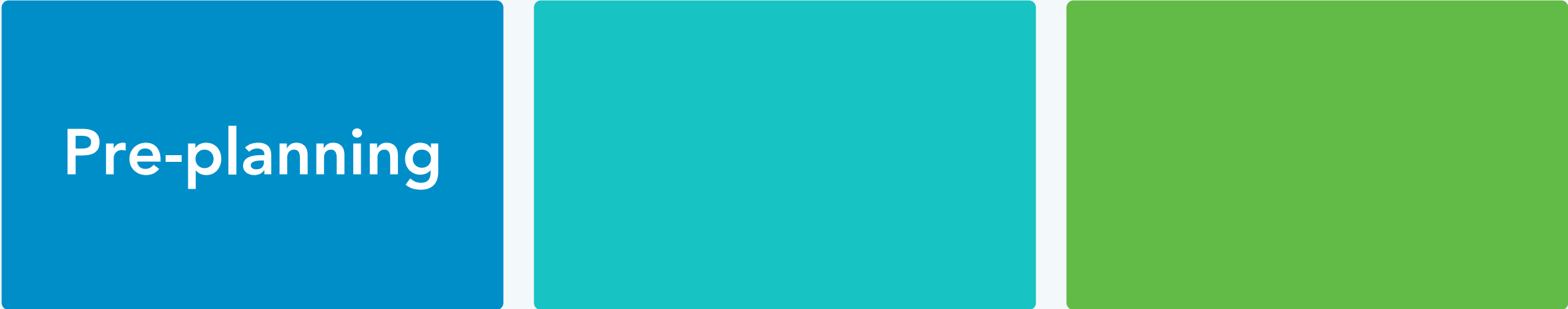
- Login
- Review payslips
- Downloading the mobile app
- Privacy



Pre-planning recap

- Review pre-upgrade documentation
- Confirm payroll schedule
- Review and return checklist
- Review E-learning and Guides (the E-learning notes the main changes you may need to be aware of ahead of the upgrade)
- Client Admin will be emailed the morning of the upgrade to confirm its completion.



Three solid-colored rectangles are arranged horizontally. The first rectangle on the left is blue and contains the text 'Pre-planning'. The middle rectangle is teal and is empty. The third rectangle on the right is green and is empty.

Pre-planning

Any questions?

Upgrade day

- Moorepay review database upgrade (out of UK working hours).
- Moorepay run Bespoke Profile security protocol (within UK working hours). Your database should be ready from 9am.
- Moorepay email client Admin to confirm that the upgrade is complete.
- If you have purchased SSO or MFA you will be contacted by the Technical Delivery team who will arrange the set up post the database upgrade.
- If you have purchased a change in service/bundles you will be contacted by the Technical Delivery or Implementation team who will arrange the set up post the database upgrade. These are not be completed as part of the upgrade.
- Admin and EE login via <https://app.moorepay.co.uk/>
- Day 1: Upgrade triage via next.gen@moorepay.co.uk

Moorepay Login

Login in from PC or Laptop

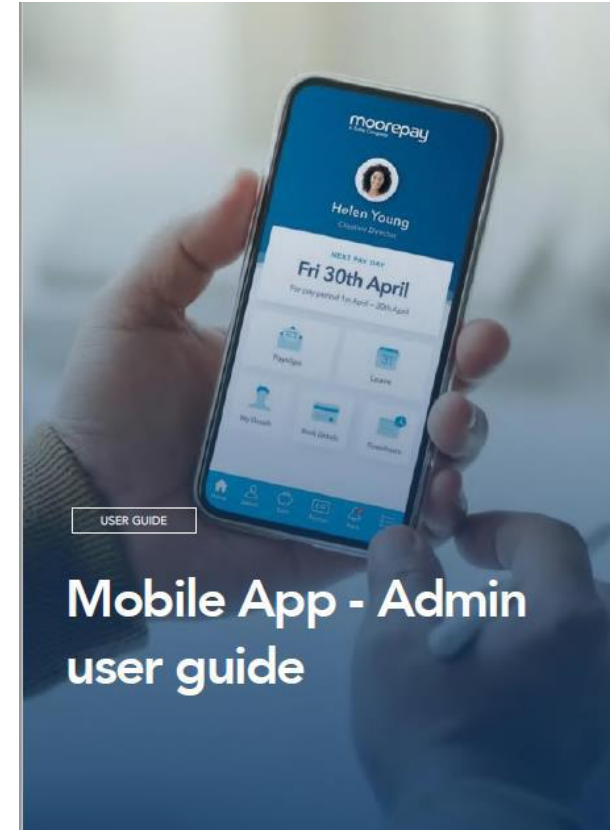
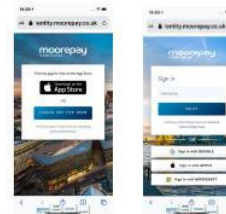
1. Type in or copy the new Moorepay URL <https://app.moorepay.co.uk/> into your browser and select Login on the web
2. Enter your Username (this is normally your email address) and click next



3. Select Forgotten your password, enter your username (normally your email address) and follow the instructions to reset your password
4. Type in or copy the new Moorepay URL <https://app.moorepay.co.uk/> into your browser and login using your username (normally your email address), and the new password you just reset

Login from a Mobile Device or Tablet

1. Type in or copy <https://app.moorepay.co.uk/> into your browser and select Login on the web
2. Enter your Username (this is normally your email address) and click next

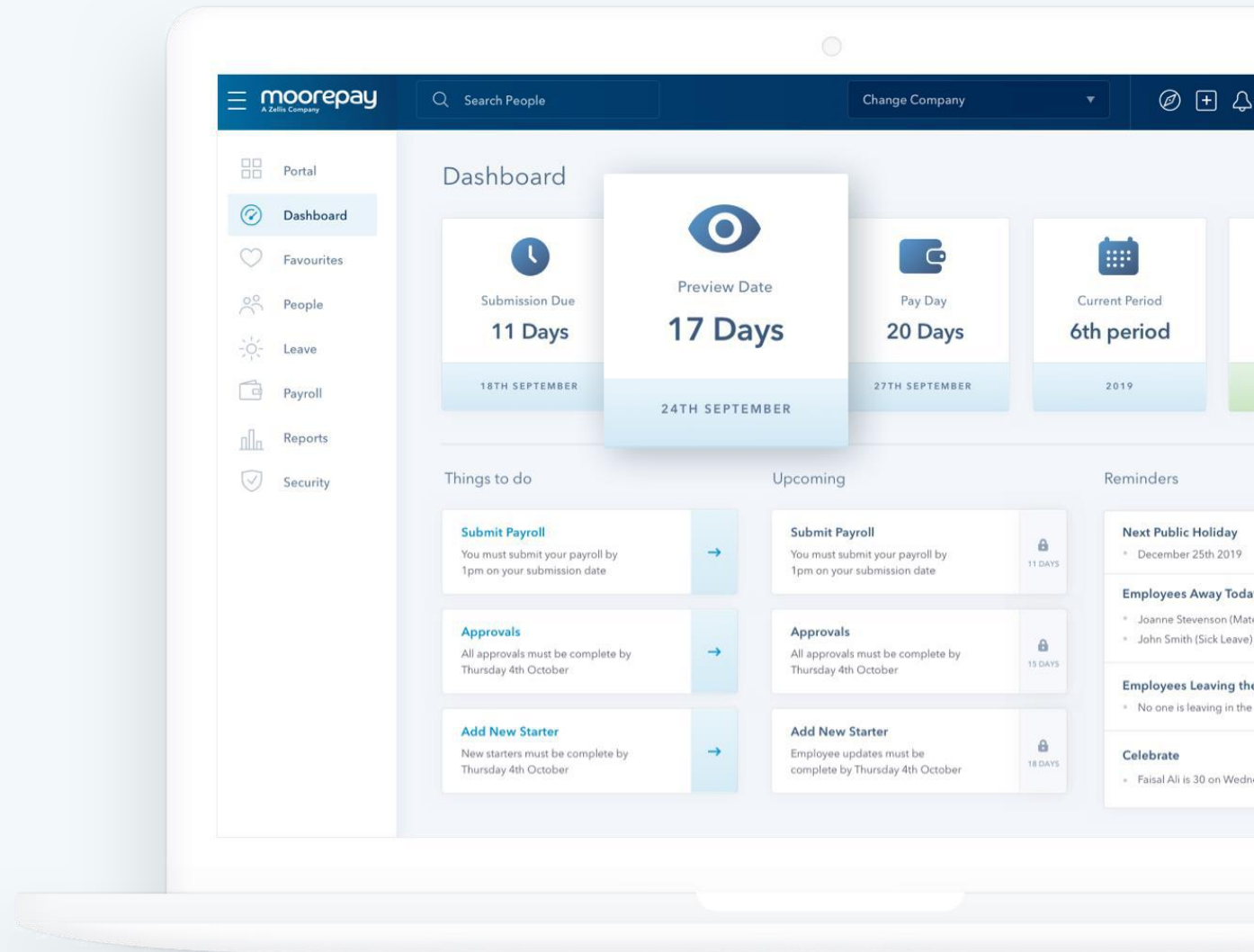


Mobile App - Admin user guide

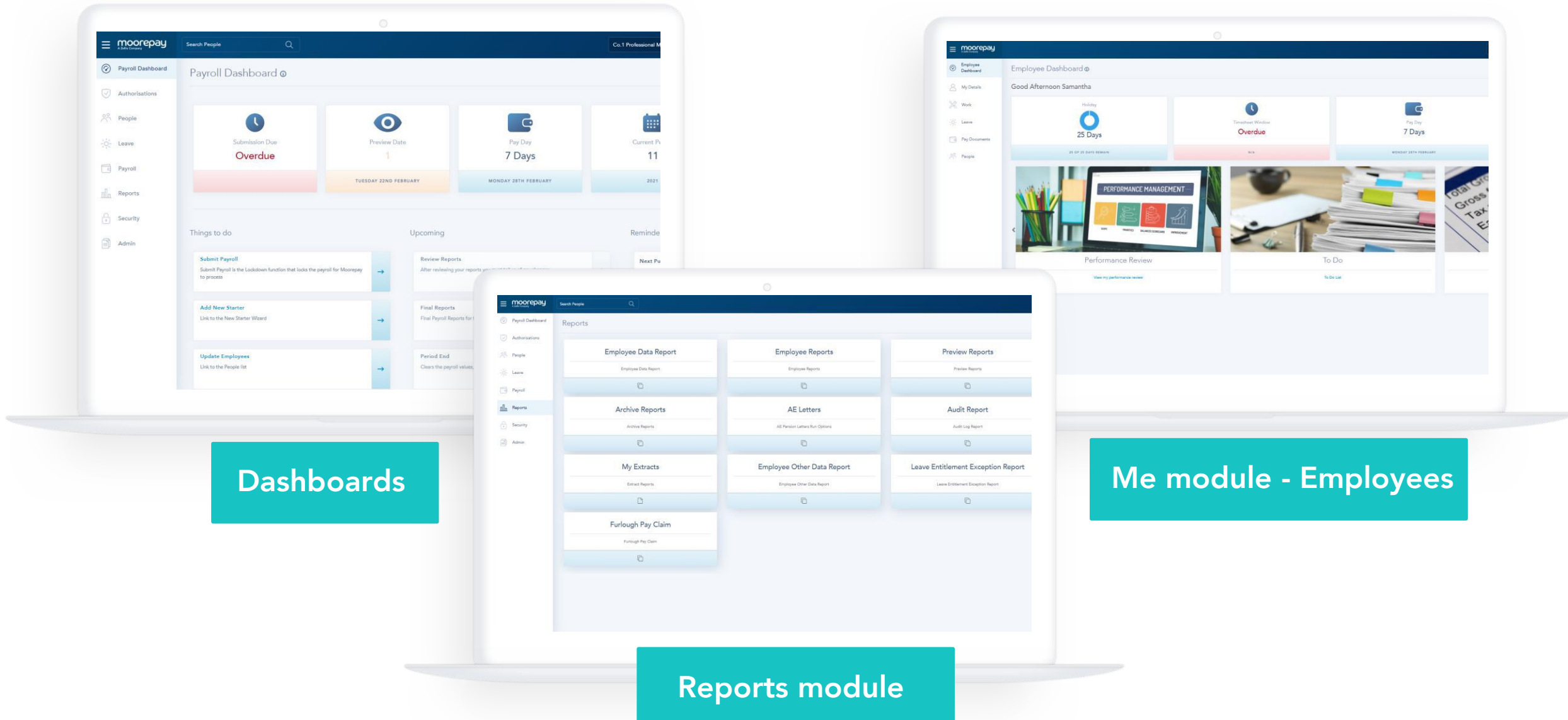
Moorepay URL: <https://app.moorepay.co.uk/>

Upgrade aftercare

- Client Admins to confirm login/access.
- Upgrade triage/escalations via mailbox for a short period of hypercare: next.gen@moorepay.co.uk
- Client will be passed back to payroll operations (BAU) following the upgrade (approx. 5 days).
- **To note:** specific payroll enquiries/calculations/escalations should continue to be directed to your dedicated payroll team.



Next Generation – Improved navigation



Next Generation – Visibility of information

Payroll Dashboard

People

Leave

Payroll

Reports

Security

Admin

mp

Search People

Co.1 Professional Software

+

3

?

6

Personal Details

← PREVIOUS

SAVE

UNDO

→ NEXT

Employee Details

Personal Details

Bank Details

Passport

Visa

Dependants

Notes

Employment

Pay and Deductions

Statutory Details

Statutory Leave

Pay Documents

Personal Details

Title

Mr

Marital status

Married

*First forename

David

Second forename

Maiden name

*Surname

PROFILE

Employee Id: 100011

Name: David Adams

Position: Sales Executive 12

Start Date: 14/06/2010

Length of Service: 11y 8m

Business Email: david.adams@moorepay.co.uk

Work Phone: 1614477579

Work Mobile: 776532901

Profiles

David Adams

100011

Sales Executive 12

STARTED ON 14 JUN 2010

WORKED HERE 11Y 8M

david.adams@moorepay.co.uk

1614477579

David Admin

6

Sales Executive 12

STARTED ON 12 JUN 2019

WORKED HERE 2Y 8M

david.admin@moorepaydemo...

1614477580

Alexander Amber-Emma ...

300005

Sales Director 22

STARTED ON 27 SEP 2013

WORKED HERE 8Y 5M

manager22@yopmail.com

1614477581

Louis Anderson

200004

Sales Executive 24

STARTED ON 14 OCT 2011

WORKED HERE 10Y 4M

louis.anderson@moorepay.co.uk

1614477609

People

HR Dashboard

Current Head Count

158

HEADCOUNT

Headcount By Gender

Female 73

Male 85

GENDER SPLIT

Employees Away Today

No record to display

EMPLOYEES AWAY

View sick cost

Team Sick Cost Vs Total Team Cost

Sick Days : 66

Days Worked : 39919

Celebrations & Away today

Employees Away Today

No one is away today

Employees Leaving the Business

No one is leaving in the next 14 days

Celebrate

No upcoming events

Next Generation – The phone book

People (159) SORT BY: SURNAME A-Z

 David Adams 100011 Sales Executive 12 STARTED ON 14 JUN 2010 WORKED HERE 11Y 8M david.adams@moorepay.co.uk 1614477579	 David Admin 8 Sales Executive 12 STARTED ON 12 JUN 2019 WORKED HERE 2Y 8M david.admin@moorepaydemo.... 1614477580	 Alexander Amber-Emma ... 300005 Sales Director 22 STARTED ON 27 SEP 2013 WORKED HERE 8Y 5M manager22@yopmail.com 1614477581	 Louis Anderson 200004 Sales Executive 24 STARTED ON 14 OCT 2011 WORKED HERE 10Y 4M louis.anderson@moorepay.co.uk 1614477609
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Phone Book

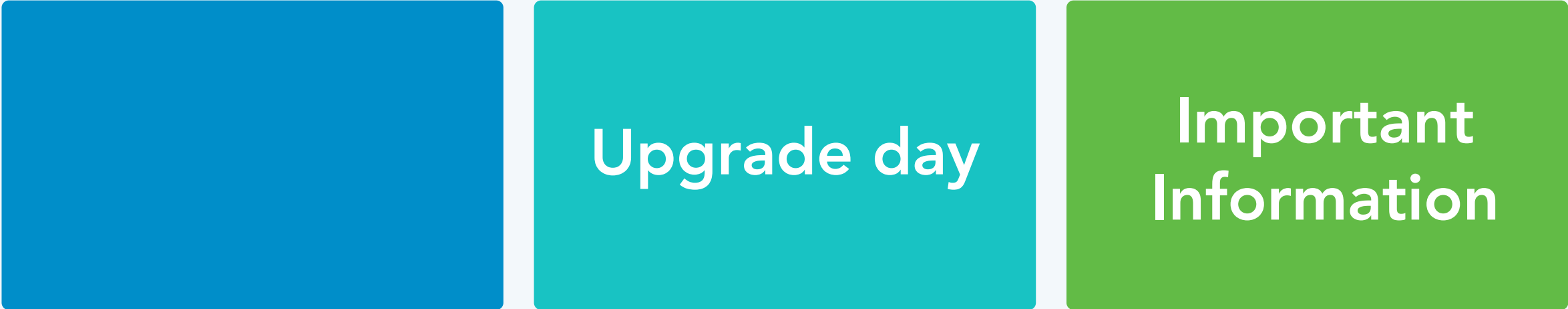
Phone book functionality

The advanced phone book functionality shows:

- Full names (Including middle names)
- Start Date
- Length of Service
- Email address (in Business field)
- Phone number (Work mobile)

This functionality can be switched off by your administrator under configuration in the security screen.

Choose to switch this off or on before your upgrade.



Upgrade day

Important
Information

Any questions?

Important information – Pre & Post Upgrade

Pre-upgrade

1) Security profiles / User profiles review

We advise administrators to conduct a review of their hierarchy ahead of the upgrade. Please review your positions, organisation units and security profiles. This is particularly relevant if you use leave, timesheets, expenses and approval/workflow functionality. Please ensure that positions are assigned correctly to the appropriate org unit and security profile. Errors in your hierarchy will affect the visibility of team members to managers, approval workflows and corrections after the upgrade may incur additional costs.

If you need support to conduct a hierarchy review, we can provide 'how to' instructions to run your own Position, Org Unit & Security Profile reports (to review your hierarchy).

2) Email addresses / Phonebook functionality

We advise administrators to review email addresses, ensuring they are up to date. Full names, length of service, email addresses held in the business email field, phone number and work mobile will be visible to ALL employees through the phonebook functionality. If your organisation uses personal email addresses in this field this will be a GDPR risk if the phonebook functionality is switched on. This can be switched off ahead of the upgrade on instruction, or by client administrator via (configuration within the security screen).

Post-upgrade

1) E-mail verification and first login attempt

All users will be required to verify their unique email address, reset password and login. Employees will not be able to access the NextGen application if this process isn't completed. Instructions are available in the pre-upgrade documentation guides.

To note: Administrators will be required to provide password resets if EE's lock themselves out of the application.

2) New URL

The Next Generation application has a NEW URL <https://app.moorepay.co.uk/>. Anyone trying to access the system with the old URL will receive an error message. We would advise clients to instruct Employees to remove any pre-saved bookmarks.

3) The upgraded application

Due to the improved scrolling design on the Next Generation application, users are visiting more screens within the application. They are visiting more screens and therefore there is often an increase in queries to the administrator over the first few week after the upgrade.

Important information - Advisories

1) Whitelist the email address

Please check with your IT team that you have whitelisted the Moorepay.co.uk email address, as this will be required for the upgraded application. This is particularly important if you use Mimecast Security.

2) E-learning

You will be provided with e-learning to support your upgrade. We advise that you complete this eLearning prior to the upgrade as there are changes to some screens which may affect the way in which you use the software. In addition to the eLearning, in application can be found throughout the application when you see a bubble or ⓘ.

3) Payroll reports

Payroll reports will be available from the reports module/tile within the Next Generation application. They are available as separate pages and a consolidated report. Please download any archived reports ahead of the upgrade as archived reports will transfer approx. 10 days after the upgrade.

4) Equal opportunities data

Equal opportunities information is held within the contract screen and contains date of birth. This screen is visible to the standard manager profile as it is in MPHR currently.

5) Basic pay data

Basic pay data is visible to the standard manager profile (as it is in MPHR). If you have managers who are on the same level and organisation unit (perhaps for visibility of the leave calendar), this data will be visible for these managers. If you do not want your managers to be able to have visibility of the basic pay screen and attachments (such as contractual documents) you will need to change their profiles accordingly.

6) Contract details

Contract details and history are visible to the standard manager profile (as they are in MPHR).

7) Leavers

If you have not removed/deleted leaver user security profiles, they may still have access to their payroll information. If you do not want a leaver to have access to the software, please remove their user security profile accordingly. If you have recently made leavers please ensure that you advise them to download their payslips and P60's.

8) Bulk Timesheets

Due to some of the field changes in NextGen you may need to review and update your bulk timesheet templates after the upgrade.

9) Extractor Reports

Please take a snippet of your existing extractor report names for reference after the upgrade. Please note that you may have to edit, and select output and run extracts after the upgrade.

10) Search

There is no general search in NextGen, due to the design and build.

11) Post Pay Changes (Payroll Software Clients)

Early Pay Modelling has been changed to Post Pay Changes which can be used to make adjustments after initial preview reports have been created.

Important information - Advisories

12) Favourites

Favourites will not be available in NextGen, please download and save any of the links or saved items you current have/use. Favourite extractor reports will no longer exist, assigned reports will be to levels not individuals.

13) Access change - Admin/Super Admin

In the NextGen application there is now an additional level of Administrator; a Super Admin in addition to the standard admin profile. Super Admin leave requests are automatically approved, they can review, approve and reject all leave applications submitted by anyone within the business, receive email notifications when a leave application is approved by a manager and are able to create other Super Admin user accounts.

14) Dashboards

When you first login to the Next Gen Application, you will have a new Dashboard. This dashboard provides a clear view of where you may be in the processing schedule. Please note that the data that informs this dashboard would have been created your original build and may not reflect more recent changes in your schedule.

15) Expenses

If you use the expenses functionality, please note that users are required to submit their own expense claims. Mgrs & Admins are not able to submit expense claims on behalf of an employee.

16) Microsoft Office 365 Integration

If you are interested in Microsoft Office 365 integration please contact your account manager who will be able to provide you with a guidance document. Please note that this service is not set up as part of the upgrade

17) Timesheet & Expenses Entries

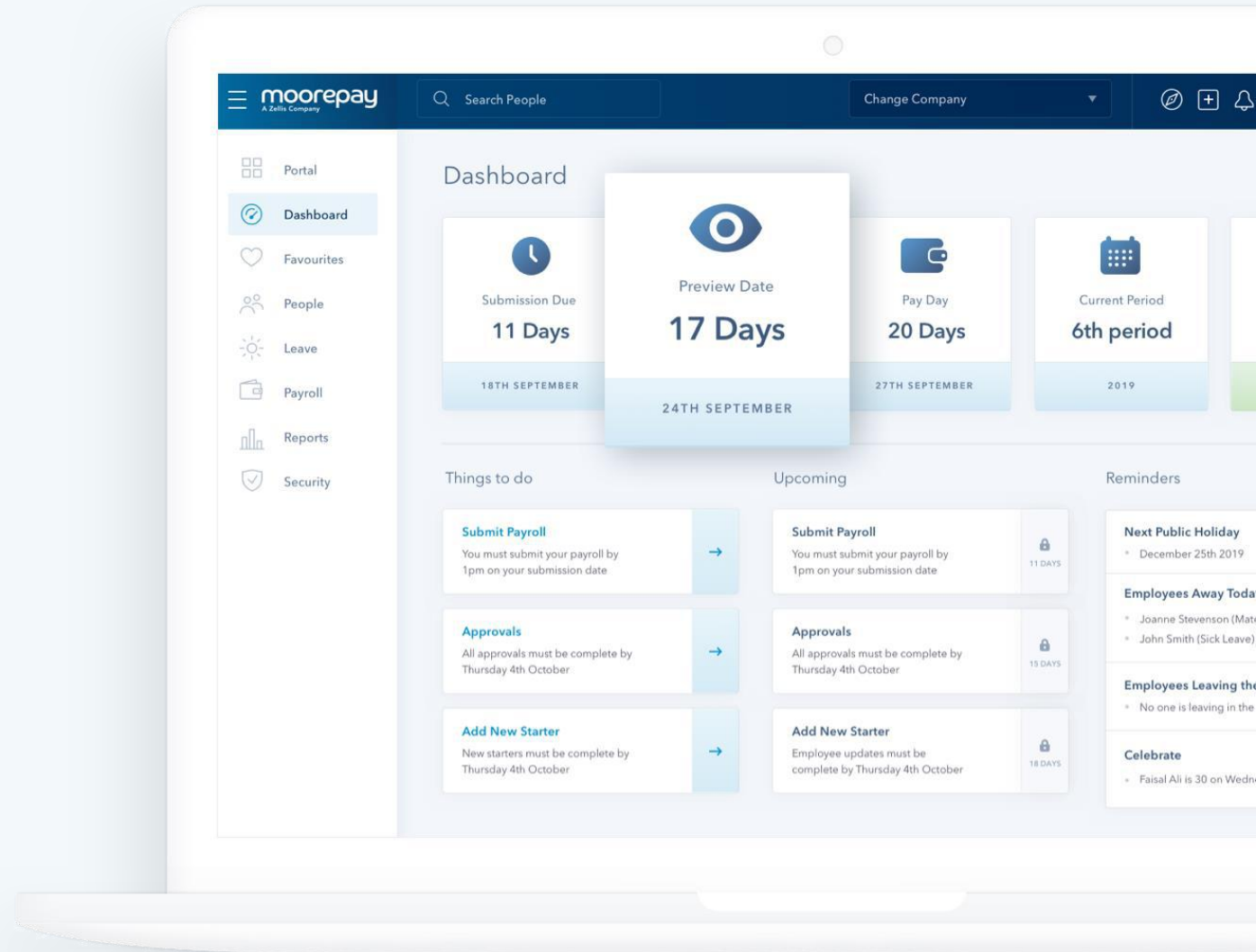
In MPHR, bespoke access could be set up to enable someone to input timesheets (e.g. Manager for their team members) or expenses (e.g. PA for their Manager) on behalf of another employee. This functionality is not available in the Next Generation Software and either needs to be entered in the module by the employee, or in the variable pay screen by an Admin.

In summary

Pre-planning

Upgrade day

Important
Information



Making payroll & HR easy

What next?

To find out how we can support your business, call us on **0345 184 4615** or visit **www.moorepay.co.uk**