

axis[®] payroll 2016

New features overview

04.10.2016

Foreword

Welcome to **axis payroll 2016**!

This release is the culmination of the past two years development work since the launch of **axis payroll 2014**.

We are pleased to be able to say that **axis payroll 2016** incorporates more enhancements than any previous release. We have also pre-released more of these new developments to our Software Assurance customers than ever before; many of the new features outlined in this document have been available to those subscribing to Software Assurance for 18 months in some cases. This means that not only have those customers been able to take advantage of those enhancements sooner but they have been available in smaller "bite-sized" upgrades, making them easier to assimilate.

A specific design brief for **axis payroll 2016** was to focus on functionality rather than changing the user interface; we wanted our users to be immediately comfortable with the new release and to be able to concentrate on the job in hand. Feedback from users of other software packages (such as Microsoft Office) is that following an upgrade it sometimes takes a while to find the new ways of doing familiar tasks. We hope that you do not find this to be the case with **axis payroll 2016**.

Regards

The axis payroll Development Team

Introduction

This document outlines the major new features and benefits that you can expect to see by upgrading to **axis payroll 2016** from the previous edition of software, **axis payroll 2014**.

This list is by no means exhaustive and further enhancements will continue to be added after the initial release in the form of on-going level updates; please check the axisfirst web site at <http://www.axisfirst.co.uk/axispayroll> for the latest product information. Level updates within the **axis payroll 2016** release will be free to all **axis payroll 2016** licensees with current support contracts.

Similarly, **axis payroll 2014** continued to be enhanced and improved during its life and so, if you are upgrading from an early level of **axis payroll 2014**, there will be further modifications to be seen over and above those documented here.

In addition to the normal on-going level updates for **axis payroll 2016**, those customers with Software Assurance may be offered further updates from time to time, which will be pre-releases of new features from the next release of software due in 2018.

Details of Software Assurance, and of any pre-release features from the next version that have been made available to Software Assurance customers, can be found on the axisfirst web site at <http://www.axisfirst.co.uk/software/assurance> and will also feature in newsletter emails from time to time.

Upgrading to axis Payroll 2016

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis payroll 2016** under the terms of their agreement. To request an update to **axis payroll 2016**, Software Assurance customers should visit our web site at <http://www.axisfirst.co.uk/software/assurance/> and follow the link to request their upgrade. The online request form also allows training to be ordered at the same time.

If you have both **axis diplomat** and **axis payroll**, you only need to complete the online request form once.

Details of Enhancements

In the following sections, these icons have been used to aid clarity:



A standard facility within **axis payroll 2016**, available to all



A facility within **axis payroll 2016** that has already been pre-released to those customers with Software Assurance

Index

Section 1	Kernel (Core) Enhancements	9
Section 2	Payroll	11
Section 3	Upgrade Options and Pricing	22
Section 4	Supported Environments	24
Section 5	Withdrawn Facilities.....	25

Section 1 Kernel (Core) Enhancements

1.1. Faster Backup & Restore via Compressed Attachments

All attachments within the system are now automatically archived into a single compressed file after a period of time. This is entirely transparent to the user since archived attachments remain visible within the appropriate Attachments tabs of the system. The benefit is a substantial reduction in backup and restore times since it is much quicker to backup a single large file than thousands of small ones.

On a typical large system the backup time is reduced by 25% although this may be more or less, depending on how extensively attachments are used.

1.2. Scroll Wheel Support in Report Viewer

When using a mouse with a scroll wheel, the wheel can now be used to scroll up and down through the pages of a previewed axis report.

1.3. Create Word and Excel Document Attachments

It is now possible to create new blank Microsoft Word and Microsoft Excel documents directly within the Attachments tab of any item that offers attachments (such as employees and qualifications).

This offers greater convenience and time-saving when compared with creating the document elsewhere (such as on your desktop) and then copying the document into the attachments area. It also eliminates the chance of leaving a spurious duplicate file behind wherever that original file had been created (with the possible future confusion as to which is the master document - the one attached to axis payroll or the one on the desktop).

1.4. Document Scanning

For anyone with a scanner available with a Twain-compatible driver, it is now possible to scan documents directly into the Attachments area for any item that offers attachments.

As with the direct creation of Word/Excel documents (see above), this saves time by replacing what would have previously been a two-part process (i.e. scan the document to the desktop using a third party scanning solution and then copy the scanned document into the Attachments tab afterwards).

1.5. Windows User Groups



The Windows User Groups used by axis payroll have been separated from those used by axis diplomat. Separate Windows User Groups are now created for AXIS Payroll Users and AXIS Payroll Supers.

This development allows you to now have users that, for example, have supervisor or administrative access to axis diplomat and it's folder structure but not to axis payroll and its folder structure.

Section 2 Payroll

2.1. Electronic Payments

The Electronic Payments module which was previously available as an optional extra is now standard.

The module allows you to interface to a number of the leading banks' banking software to make payments to suppliers, as well as allowing payments via BACS.

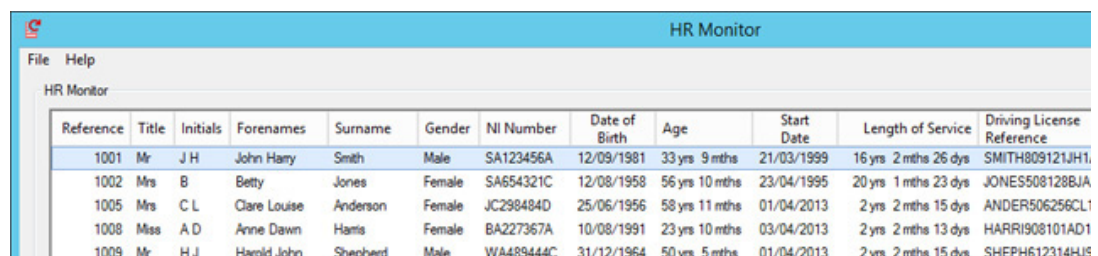
Currently supported bank software includes packages from Lloyds Bank, Barclays, HSBC and NatWest.

For further information, please visit our website at:

www.axisfirst.co.uk/documentation/Electronic-Payments/articles/14778

2.2. HR Monitor & Personnel Enquiry

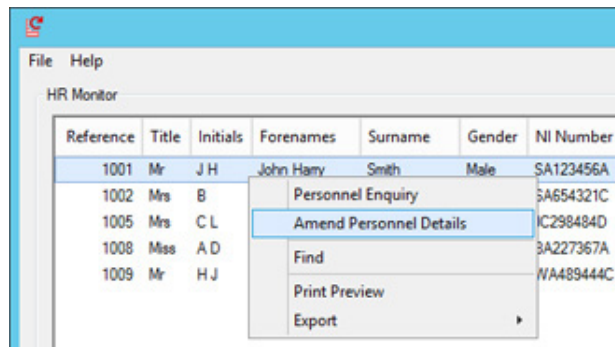
A completely new HR Monitor has been added to the system. This provides an overview of the employees on the payroll but excludes any information relating to pay. It is designed to be used by staff that require access to the HR-related information on employees (such as contact details, qualifications and driving licence details) but should not be able to see details of their remuneration.



Reference	Title	Initials	Forenames	Surname	Gender	NI Number	Date of Birth	Age	Start Date	Length of Service	Driving License Reference
1001	Mr	J H	John Harry	Smith	Male	SA123456A	12/09/1981	33 yrs 9 mths	21/03/1999	16 yrs 2 mths 26 dys	SMITH809121JH1
1002	Mrs	B	Betty	Jones	Female	SA654321C	12/08/1958	56 yrs 10 mths	23/04/1995	20 yrs 1 mths 23 dys	JONES508128BJA
1005	Mrs	C L	Clare Louise	Anderson	Female	JC298484D	25/06/1956	58 yrs 11 mths	01/04/2013	2 yrs 2 mths 15 dys	ANDER506256CL1
1008	Miss	A D	Anne Dawn	Hamis	Female	BA227367A	10/08/1991	23 yrs 10 mths	03/04/2013	2 yrs 2 mths 13 dys	HARRI908101AD1
1009	Mr	H J	Harold John	Shepherd	Male	WA489444C	31/12/1964	50 yrs 5 mths	01/04/2013	2 yrs 2 mths 15 dys	SHEPH612314HJ5

The standard security and privacy functionality of axis payroll can then be used to allow access to the HR Monitor but not to the Employee Monitor, which does allow access to salary data.

Right-click options within the HR Monitor provide access to a new Personnel Enquiry to view all of the HR-related information as well as an option to amend those details.



The Amend Personnel Details window for employee 1001 (John Harry Smith) shows various tabs and fields. The 'Main Details' tab is active, displaying personal and employment information. The 'Analysis Details' tab shows department and cost code information. The 'Accounts Journal Details' tab shows accounts department and cost centre information. The 'Holiday Entitlement' tab shows annual entitlement and brought forward amounts.

Employee Details		Analysis Details	
Reference	1001	Department	D1
Surname	Smith	Cost code	CC1
Forenames	John Harry	Paypoint	P1
Title	Mr	Accounts department	0
Initials	J H	Accounts cost centre	0
Known as		Holiday Entitlement	
Gender	Male	Annual entitlement (days)	21
Marital status	Single	Entitlement brought forward	0.0
Date of birth	120981	Additional entitlement this year	0.0
Age	33 yrs 9 mths		
N.I. number	SA123456A		
Pay frequency	Monthly		
Status	Active		
Start date	210399		
	16 yrs 2 mths		

2.3. Absence Monitor

This function is designed to provide an overview of employee absence for this year and last, based on the payroll holiday year.

Reference	Title	Initials	Forenames	Surname	Holiday Entitlement (Annual)	Holiday Brought Forward	Additional Holiday Entitlement This Year	Holiday Taken	Holiday Booked	Holiday Remaining	Sickness YTD	Bereavement Absence
1001	Mr	J H	John Harry	Smith	21	3.0	0.0	17.0	3.0	4.0	0.0	
1002	Mrs	B	Betty	Jones	21	0.0	2.0	12.0	0.0	11.0	0.0	
1005	Mrs	C L	Clare Louise	Anderson	21	4.0	0.0	15.0	0.0	10.0	0.0	
1008	Miss	A D	Anne Dawn	Harris	21	0.0	0.0	8.0	5.0	8.0	0.0	
1009	Mr	H J	Harold John	Shepherd	21	0.0	1.0	9.0	0.0	13.0	0.0	

In addition to columns of information relating to the employee in general (name, job title, line manager, etc.), the monitor includes columns showing all of the information relating to absence, including:

Holidays:

- Holiday Entitlement (Annual)
- Holiday Brought Forward
- Additional Holiday Entitlement This Year
- Holiday Taken
- Holiday Booked
- Holiday Remaining
- Holiday Entitlement Accrued YTD

Year To Date Absences:

- Sickness
- Bereavement Absence
- Unpaid Leave
- Excused Absence
- Absent without Leave
- Parental Leave

Last Year Absences:

- Sickness (Last Year and Last 12 Months To Date)
- Bereavement Absence
- Unpaid Leave
- Excused Absence
- Absent without Leave
- Parental Leave

It does not include salary-related information and so, as with the HR Monitor (see above), is suitable for use by staff who may not be authorised to view salary information.

Reference	Title	Initials	Forenames	Surname	Holiday Entitlement (Annual)	Holiday Brought Forward
1001	Mr	J H	John Henry	Smith	21	3.0
1002	Mrs	B	Betty			0.0
1005	Mrs	C L	Clare			4.0
1008	Miss	A D	Anne			0.0
1009	Mr	H J	Harold	Hein		0.0

right-click drilldown options are provided to the Personnel Enquiry and to Amend Personnel Details

2.4. Employee Monitor Enhancements



The existing Employee Monitor has been extended to show additional columns:

- Annual Projected Permanent Pay (to provide, at-a-glance, the employee's basic salary)
- Length of Service (in years, months and days)
- Left indicator and Leaving Date
- Number of Pension Schemes
- Payroll Department
- Payroll Cost Code
- Paypoint
- Accounts Department and Cost Centre
- Driving Licence Reference and Last Check Date

In addition, employees that have left are now shown in grey whilst personnel records are shown in blue.

2.5. Payment History



The Payment History tab previously only available via the Employee Enquiry is now also available within the Amend Employee Details function.

The scrolling data list has been extended to include individual columns for each pay and deduction code used for that employee. All appropriate columns now also include totals.

A further column has been added for the tax year applicable to each payment so that filters can be used to limit the data shown to a specific tax year.

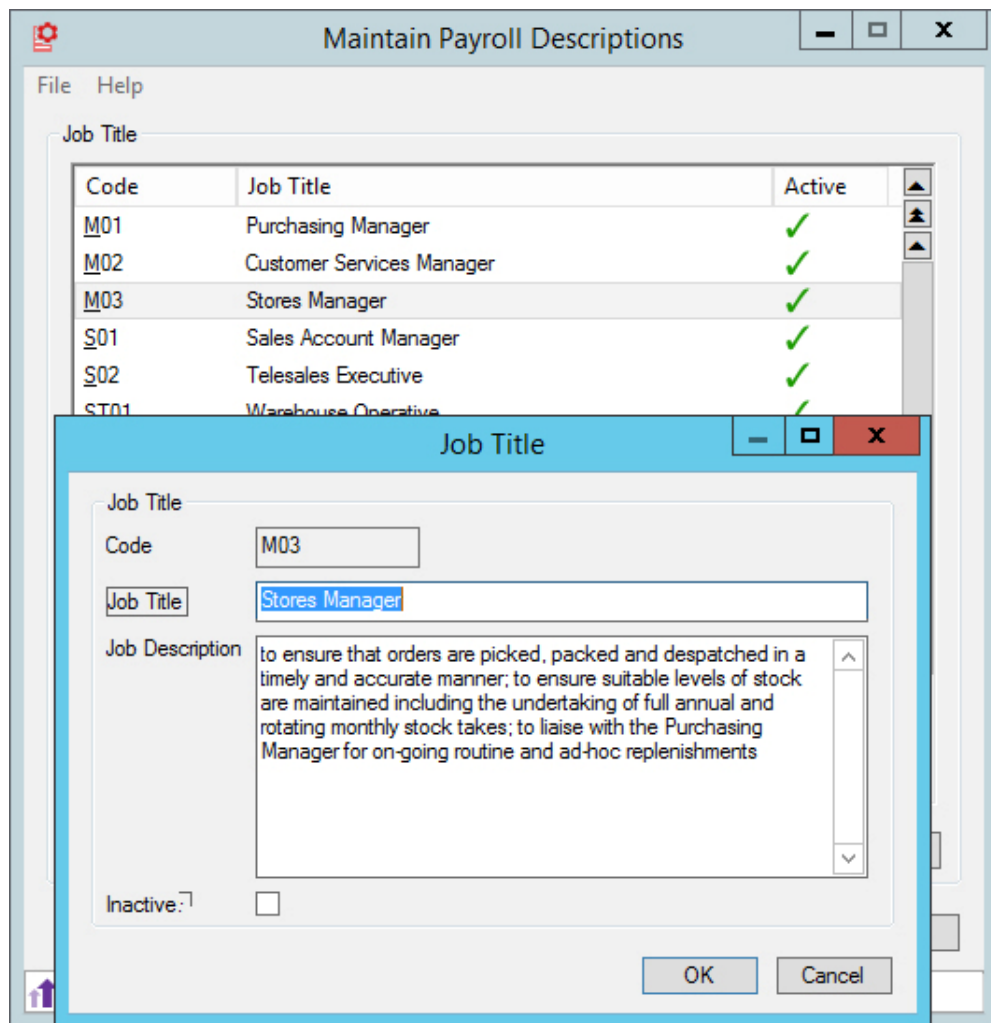
Date	Tax Year Ending	Gross Taxable	Gross Earnings	Pension Conts.	P.A.Y.E.	N.I.C.	Other Payme...	Other Deducts	Net Pay	Net Roundi...
27-03-2014	2014	1650.00	1650.00	0.00	172.40	120.48	0.00	0.00	1357.12	0.00
28-02-2014	2014	1650.00	1650.00	0.00	172.60	120.48	0.00	0.00	1356.92	0.00
27-01-2014	2014	1650.00	1650.00	0.00	172.40	120.48	0.00	0.00	1357.12	0.00
29-12-2013	2014	1650.00	1650.00	0.00	172.60	120.48	0.00	0.00	1356.92	0.00
25-11-2013	2014	1650.00	1650.00	0.00	172.40	120.48	0.00	0.00	1357.12	0.00
27-10-2013	2014	1650.00	1650.00	0.00	172.60	120.48	0.00	0.00	1356.92	0.00
30-09-2013	2014	1650.00	1650.00	0.00	172.60	120.48	0.00	0.00	1356.92	0.00
26-08-2013	2014	1650.00	1650.00	0.00	172.40	120.48	0.00	0.00	1357.12	0.00
26-07-2013	2014	1650.00	1650.00	0.00	172.60	120.48	0.00	0.00	1356.92	0.00
28-06-2013	2014	1650.00	1650.00	0.00	172.40	120.48	0.00	0.00	1357.12	0.00
31-05-2013	2014	1650.00	1650.00	0.00	172.60	120.48	0.00	0.00	1356.92	0.00
26-04-2013	2014	1650.00	1650.00	0.00	172.40	120.48	0.00	0.00	1357.12	0.00
		19800.00	19800.00	0.00	2070.00	1445.76	0.00	0.00	16284.24	0.00

This example shows the Payment History tab filtered to show just those payments for the tax year ending 2014

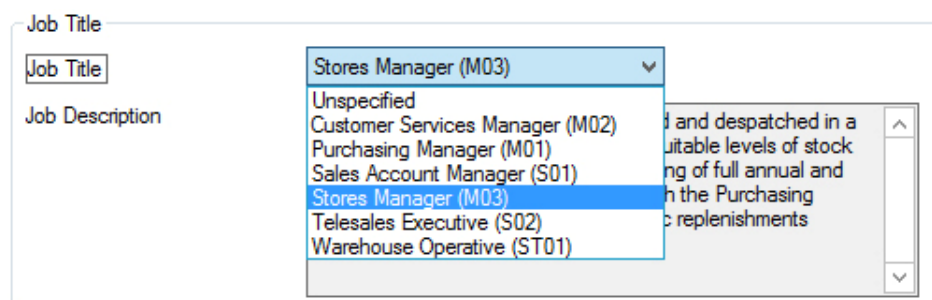
2.6. Job Title and Job Description

It is now possible to record the Job Title and Job Description against each employee. These are maintained as a separate list (via the Maintain Payroll Descriptions function). Each employee is then assigned the appropriate Job Title from the list.

This approach ensures that all employees with the same role have the same title and description and that changes to the title or description are automatically reflected across all affected employees. This not only ensures consistency but provides a database of standard job descriptions which can help simplify tasks such as preparing job advertisements or creating statements of terms and conditions of employment (see use of templates in section 2.10 below).



Using Maintain Payroll Descriptions to maintain the list of Job Titles and their corresponding Descriptions



Amend Employee Details or Amend Personnel Details is used to simply pick the correct Job Title from the list

2.7. Employee's Manager



It is now possible to record each employee's line manager against their employee record. A dropdown list of all other employees is offered to simplify selection.

The screenshot shows a 'Manager' section with a 'Line Manager' dropdown menu. The dropdown is open, displaying a list of names: 'Unspecified', 'Anne Harris', 'Betty Jones', 'Clare Anderson', and 'John Smith'. 'Clare Anderson' is currently selected and highlighted in blue.

2.8. Paypoint Descriptions



The system has been extended to allow descriptions to be associated with each Paypoint. Previously, Paypoints were simply a numeric code.

The screenshot shows a window titled 'Maintain Payroll Descriptions' with a menu bar (File, Help) and a 'Paypoints' section. Below this is a table with two columns: 'Code' and 'Description'.

Code	Description
P1	Cardiff
P2	Durham
P3	Exeter

2.9. Qualification Attachments



Qualification recording within **axis payroll 2016** has been extended to allow attachments to be added - typically these may be scanned copies of certificates.

The screenshot shows the 'Amend Employee Details' window. It has a menu bar (File, Help) and several tabs: Main Details, NIC and Tax, Payment Details, Payment History, SSP Details, Address Details, Contact Details, and Additions. The 'Education / Qualifications' tab is active. Below the tabs, there's a section for 'Employee' with 'Reference' (1001) and 'Mr J H Smith'. The 'Education / Qualification Details' section contains a table with columns: A, Establishment Name, From Date, To Date, Qualification, Subject, Type, and Grade.

A	Establishment Name	From Date	To Date	Qualification	Subject	Type	Grade
	Acme Training	01-08-2015	31-08-2016	A Level	Mower Maintenance	Professional	
	Acme Training	30-11-2015	30-11-2016	A Level	Chainsaw Maintenance	Professional	

Below the table, there's a pop-up window titled 'Education / Qualification Details' with a 'Details' tab and an 'Attachments' section. The 'Attachments' section shows a table with columns: Filename and File Type.

Filename	File Type
certificate-002.pdf	Adobe Acrobat Document

The list of qualifications has also been enhanced to show expired qualifications in red.

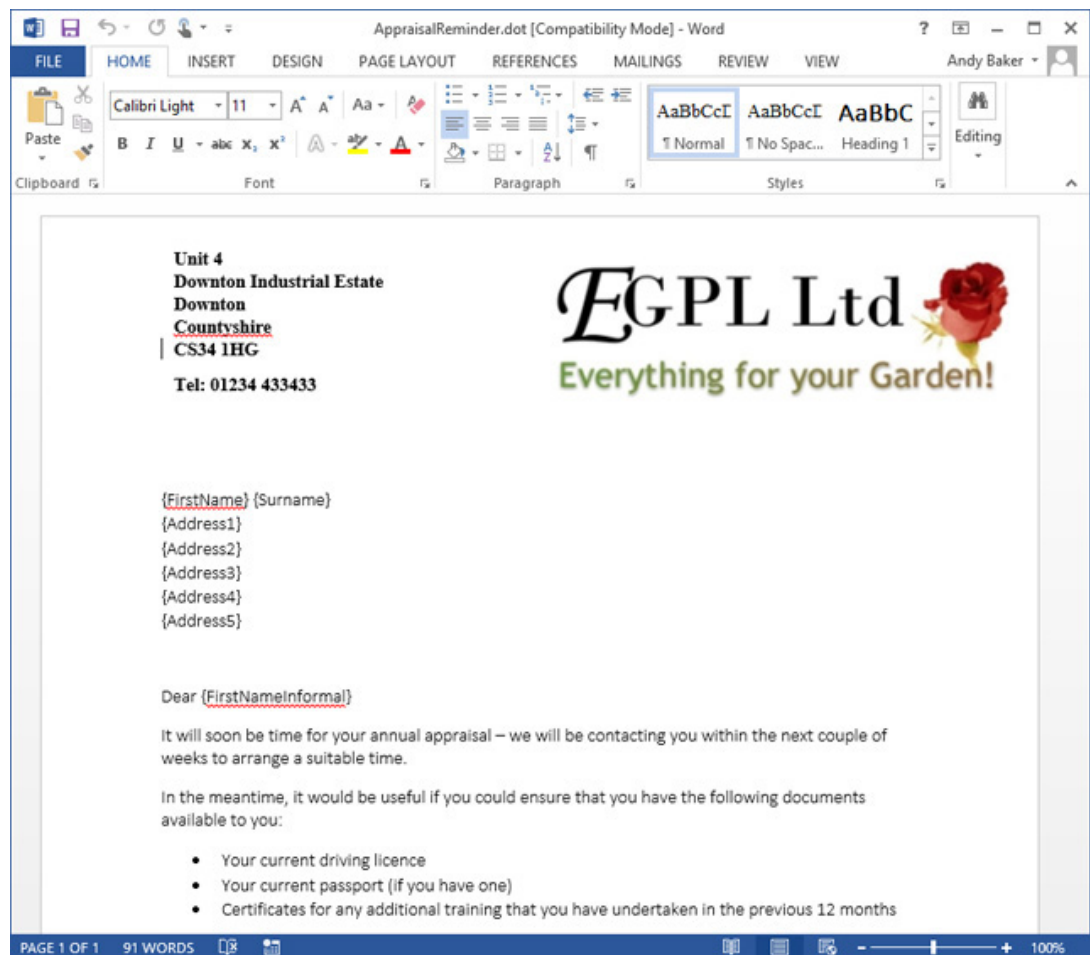
2.10. Employee Attachment Templates



We have now added the ability to create attachments to employee records from Word Document Templates (.dot or .dotx files). This mechanism will be familiar to anyone who uses the same technique to create attachments to CRM calls within axis diplomat.

Templates allow you to create standard letters and documents to cover anything from job offers, annual appraisals and salary reviews to disciplinary and dismissal letters.

The document template is simply a standard Word template but with fields added, in braces {...} that are picked up from the employee in question. For example, here is a template letter for an annual appraisal reminder:



From within the axis payroll Employee's Attachment tab, you simply click the "Create from template" button and choose the appropriate template:

Amend Employee Details

File Help

Main Details NIC and Tax Payment Details Payment History SSP Details

Additional Details Events Attachments Driving Licence Details

Employee

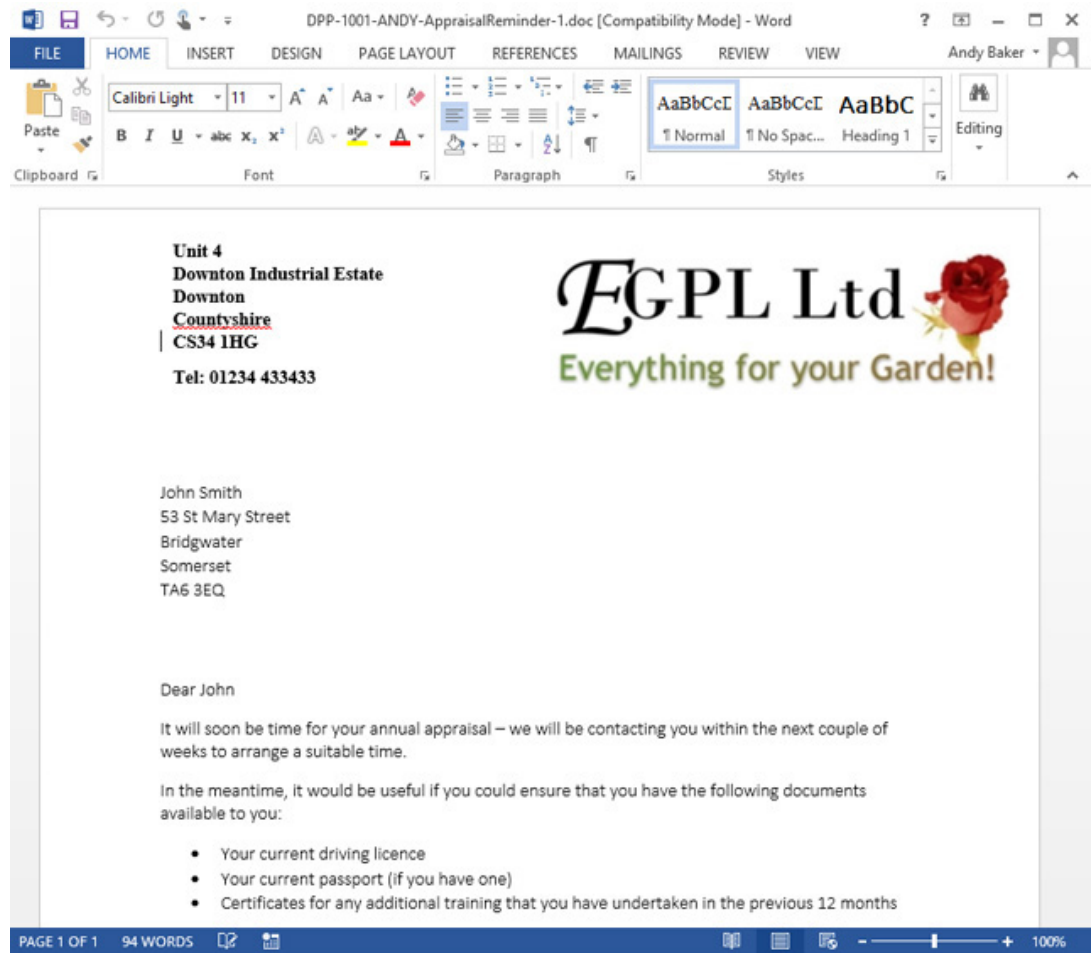
Reference 1001 Mr J H Smith

Attachments

Filename	File Type
There are no items to show	

Open Insert Delete Rename Mail Create from template

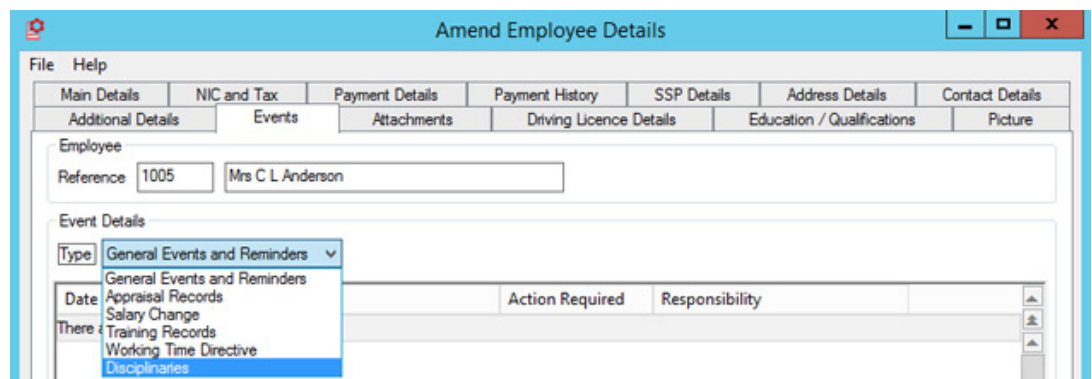
A copy of the template is then created, with the various fields replaced with the actual information for this employee:



2.11. Disciplinary Events



A new event type has been added to axis payroll to allow recording of Disciplinary events. This means that records can now be kept within the axis payroll for Appraisal Records, Salary Changes, Training, Working Time Directives and Disciplinary Events.



2.12. Import Pay/Deduction Details from CSV



Previously an optional module, this has now been made available as standard.

It allows a CSV file to be imported containing variable and permanent units/cash for a number of employees and payment codes and could be used to import data from a spreadsheet or from a third party Time & Attendance system.

2.13. Show Pension Contributions on Payslips



A new parameter has been added to allow employer pension contributions to be shown on both AXIS9 and Plain A4 format payslips.

Section 3 Upgrade Options and Pricing

3.1. Upgrade Pricing

Product	axis payroll 2012	axis payroll 2014
axis payroll 2016 Client	£99	£49

3.2. Software Assurance Pricing

Product	Per Client, Per Month
axis payroll 2016	£30.00

Note: Software Assurance for all versions of **axis payroll** is now mandatory (but also replaces the annual legislation update service that had previously been required).

axis payroll users have the benefit of downgrade rights to any version of **axis payroll** within mainstream support. This provides for situations where the **axis payroll** needs to co-exist on the same server as an **axis diplomat** system of that earlier version and it is not desirable to upgrade the **axis diplomat** installation at that time.

3.3. Additional Services

Product	
Time Unit Based Implementation Services (40x15 minutes)	£895
Time Unit Based Implementation Services (30x15 minutes)	£695
Time Unit Based Implementation Services (20x15 minutes)	£495
Time Unit Based Remote Upgrade Assistance (8x15 minutes)	£195

Time Unit Based Remote Upgrade Assistance provides for online remote upgrade of an **axis payroll** system to **axis payroll 2016**. It is not intended as a substitute for training – onsite training is strongly recommended for all upgrades to **axis payroll 2016** in order to maximize the return on investment.

3.4. Software Assurance Upgrades

A number of the new developments within **axis payroll 2016** described above have already been released to those customers with Software Assurance.



This icon in the sections above indicates a development that has already been released to Software Assurance customers

Software Assurance customers will be entitled to software licence upgrades to the full release of **axis payroll 2016** at no additional charge. Software Assurance customers will need to purchase training to ensure that they maximise the benefits that they are able to realise from the use of the new release.

Please note that, in order to allow our Software Assurance customers to manage their upgrade timing, we do not automatically send out upgrades to those customers. To request your upgrade to **axis payroll 2016**, please go to our web site at

www.axisfirst.co.uk/software/assurance/

and click on the link to request your upgrade.

Section 4 Supported Environments

axis payroll shares a common kernel with **axis diplomat** and has the same system requirements.

For the latest information on **axis payroll 2016**'s supported environments, including additional information such as approved Thin Client software and Microsoft Office versions, please see the Support Environments page within the axis diplomat section of our website at:

www.axisfirst.co.uk/software/axisdiplomat/platforms/

Section 5 Withdrawn Facilities

5.1. Dot Matrix Printers

Printing from **axis payroll 2016** using dot matrix printers is not supported. If you have not yet transitioned away from using dot matrix printing of payslips we advise you to do so **prior** to upgrading to axis payroll 2016.

Printing to dot matrix printers may be possible but **axisfirst** will no longer be able to offer support or assistance in its configuration or use.

This document is not intended as a substitute for direct evaluation of the system.

E & OE.

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