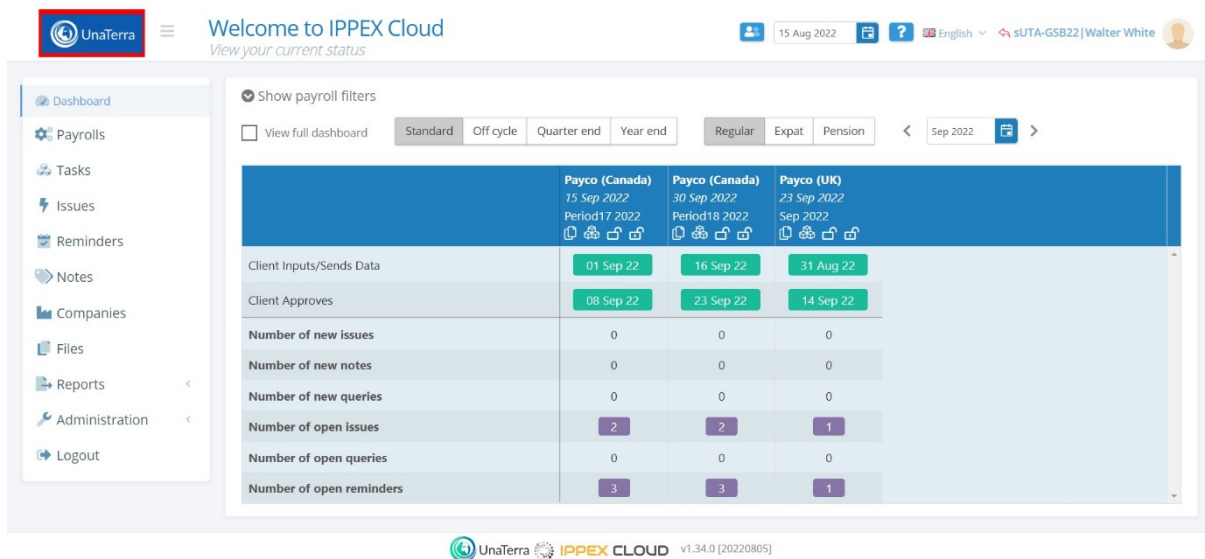


Managing payroll tasks

Tasks define the process for a payroll period.

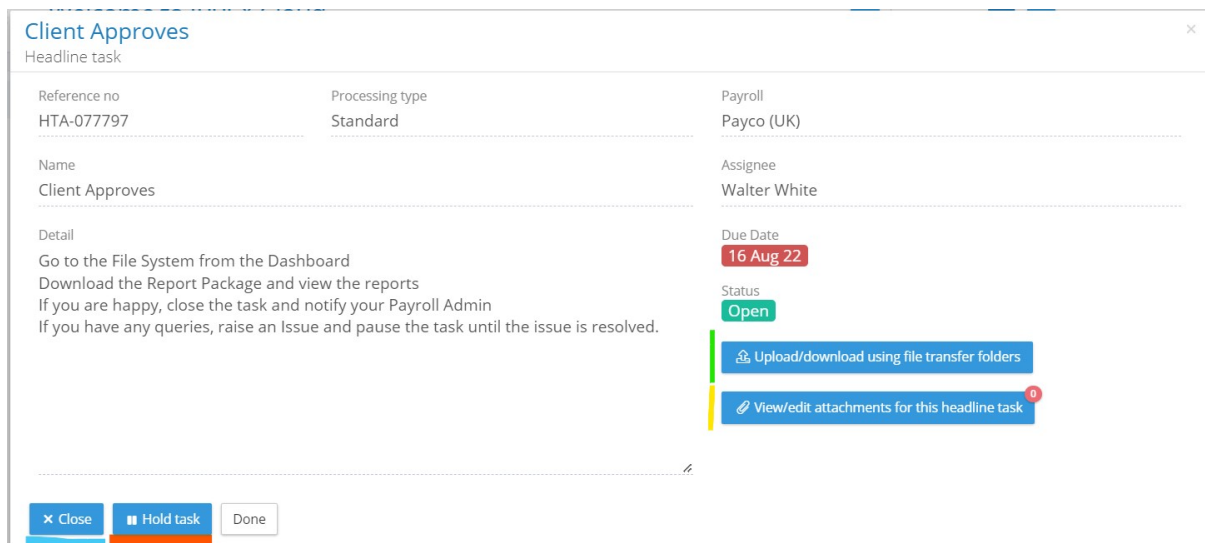
Tasks are shown on the dashboard:



The dashboard shows a table of payroll tasks with the following data:

	Payco (Canada) 15 Sep 2022 Period17 2022	Payco (Canada) 30 Sep 2022 Period18 2022	Payco (UK) 23 Sep 2022 Sep 2022
Client Inputs/Sends Data	01 Sep 22	16 Sep 22	31 Aug 22
Client Approves	08 Sep 22	23 Sep 22	14 Sep 22
Number of new issues	0	0	0
Number of new notes	0	0	0
Number of new queries	0	0	0
Number of open issues	2	2	1
Number of open queries	0	0	0
Number of open reminders	3	3	1

To open a task, click on the due date.



Client Approves
Headline task

Reference no HTA-077797	Processing type Standard	Payroll Payco (UK)
Name Client Approves	Assignee Walter White	Due Date 16 Aug 22

Detail

Go to the File System from the Dashboard
Download the Report Package and view the reports
If you are happy, close the task and notify your Payroll Admin
If you have any queries, raise an Issue and pause the task until the issue is resolved.

Status: **Open**

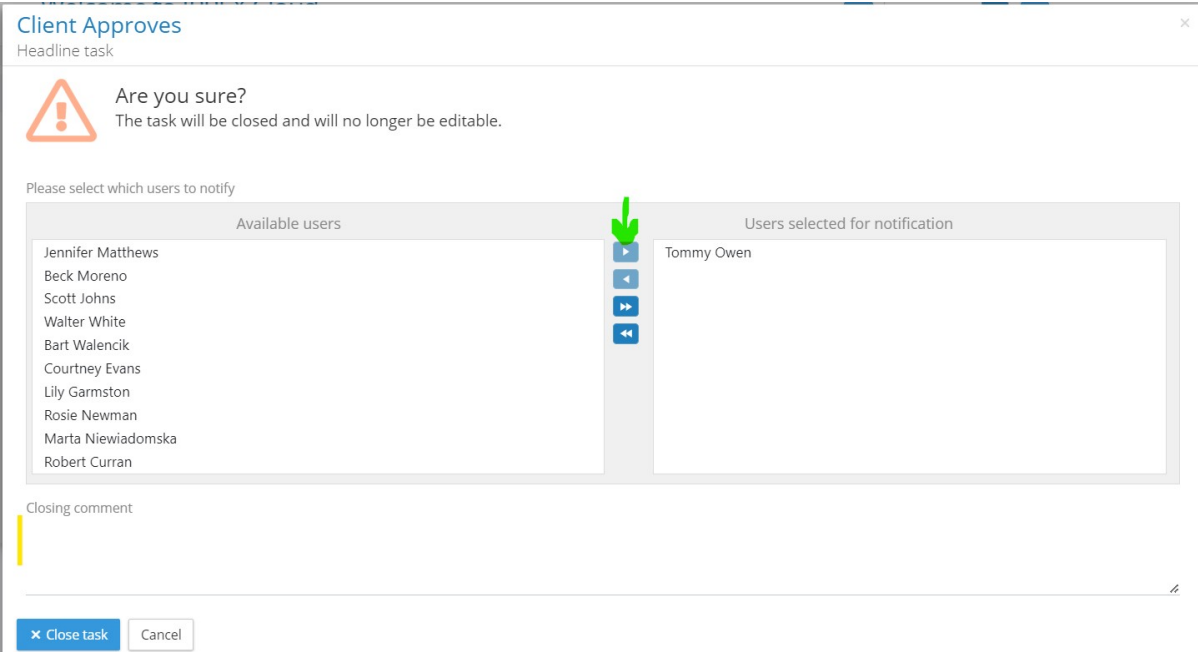
- Upload/download using file transfer folders
- View/edit attachments for this headline task

Buttons: Close, Hold task, Done

From here you can do the following:

- access the File System to upload/download a file
- add an attachment to the issue (either from the file system or your local files)
- hold the task (indicating that you are waiting for some other action or information before you can close the task)
- close the task
- exit the panel by clicking Done.

To close a task a second panel displays:



Client Approves
Headline task

⚠ Are you sure?
The task will be closed and will no longer be editable.

Please select which users to notify

Available users	Users selected for notification
Jennifer Matthews	Tommy Owen
Beck Moreno	
Scott Johns	
Walter White	
Bart Walencik	
Courtney Evans	
Lily Garmston	
Rosie Newman	
Marta Niewiadomska	
Robert Curran	

Closing comment

× Close task Cancel

- Move individual contacts across to the notify panel, or use the arrows
- Add any closing comments.
- Close the task.