Sargent-Disc Ltd
5 - 7 Baring Road,
Beaconsfield, Bucks,
HP9 2NB
Tel: +44 (0)1753 630300
Fax: +44 (0)1753 655881
www.sargent-disc.com

Payroll User Instructions

Introduction

Sargent-Disc's Payroll mobile friendly application offers a secure and efficient alternative to viewing payroll reports. Payroll can be found at the following address: **https://payroll.digitalproductionoffice.com**. Versions are also available for iPhone, iPad and Android phones from the App Store and Google Play.

Your Details

After completing the User Form, you will receive 2 unique emails from Sargent-Disc regarding username and password. These enable you to login to your SD Online account. They will be sent from

 no-reply@sargent-disc.com (*see Figure 1*).

To avoid delay, please ensure that this email address is not filtered by any anti-spam software.

Click on the link provided in the email to be directed to the login screen.
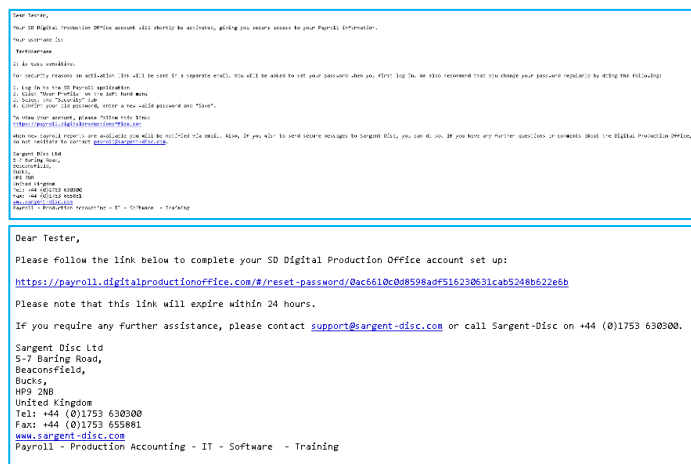

Figure 1: Username & Password

Logging In

At the Login screen, you will be required to enter your username and password (*see Figure 2*).

Please note: If you lose or forget your username or password, there is a link to retrieve this information at the bottom of the page.
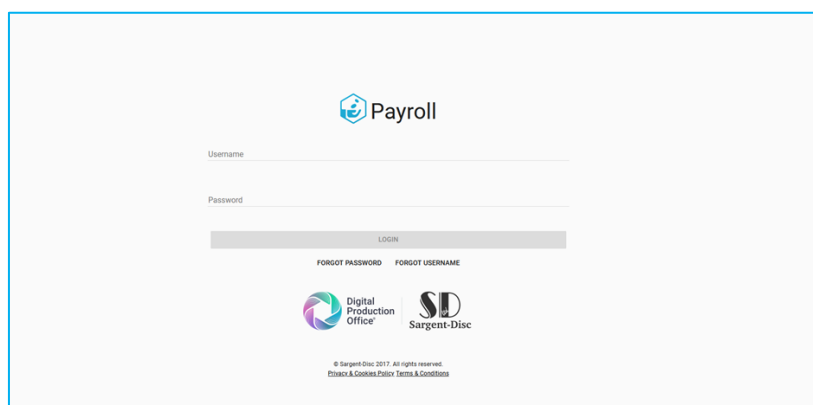
Figure 1: Username & Password

Figure 2: Login screen

Home screen and Password Change

After successfully logging in, you will see the Home screen. From here, you will be able to navigate through the system (*see Figure 3*).

When logging in for the first time, it is recommended that you change your password to something memorable. To change your password, click User Profile (located at the top right of the screen). This will direct you to a new screen with the following tabs: Details, Privacy and Security.

Clicking the Security tab will direct you to the page shown in *Figure 4*. You will be required to enter both your old password and new password. Please note that the new password must include:

- At least 12 and no more than 60 characters
- Letters and numbers
- Uppercase and lowercase
- At least one special character, e.g. ! # % ^ * () _ +
- Password strength is 'Fair' or better than 'Fair'

Figure 3: Home Screen

Figure 4: Changing Password

Payrolls

Navigate the payrolls to which you have access.

Reports

Run schedule reports by employee or payroll across all records.

Tax Week

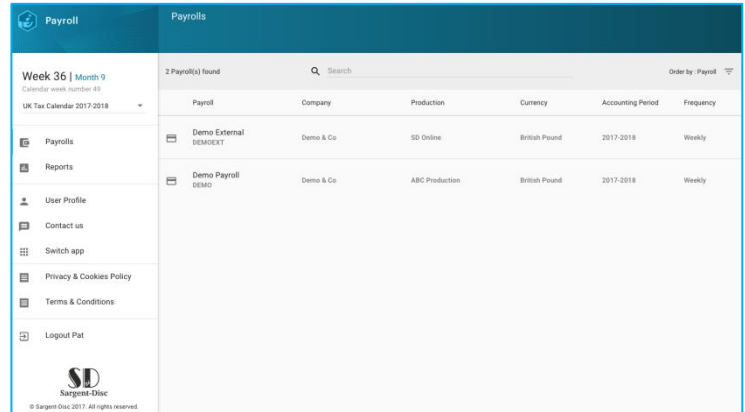Here, you will see the current UK tax week, tax start date and tax end date.
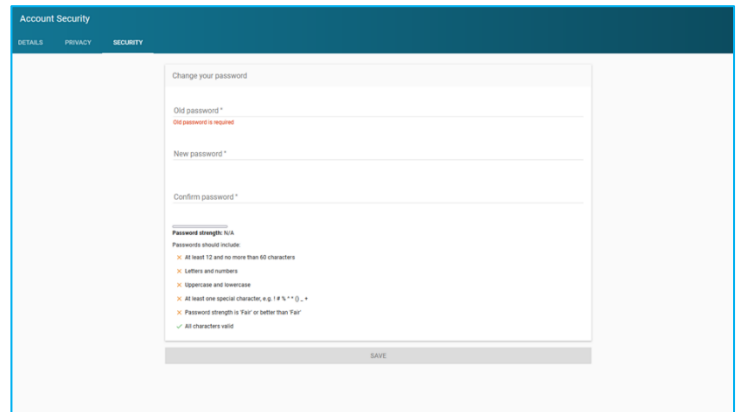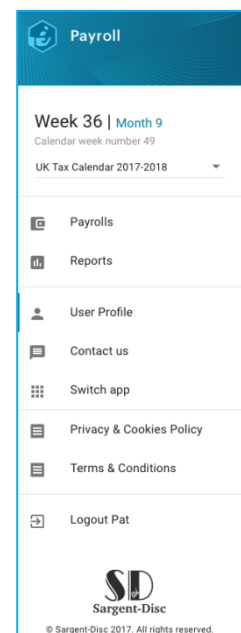

Figure 5: Home screen menu

Sargent-Disc Ltd
5 - 7 Baring Road,
Beaconsfield, Bucks,
HP9 2NB
Tel: +44 (0)1753 630300
Fax: +44 (0)1753 655881
www.sargent-disc.com

Payroll

Figure 6 provides an example of the payrolls accessible to a user.

Additionally, there is a search bar located at the top of the page that can help you to find a specific payroll.

Figure 7 illustrates the main menu within a selected payroll. The dashboard will automatically display the 40 most recent reports and 40 messages within that payroll.

Located at the top of the Dashboard you will see the following tabs:

Dashboard

This is the starting screen for a given payroll. It contains a summary of recent reports and messages for the payroll, as shown in *Figure 7*.

Employees

Here, you will be able to see the details of your previous or current employees (*See Figure 8*).

Selecting an employee will allow you to view their personal details and payslips.

Messages

Here, you will be able to send and receive messages, along with any attachments that need to be delivered.

A full history of all payroll communication can be found here (*See Figure 9*).

Figure 6: Select payroll

Figure 7: Dashboard

Figure 8: Employees

Figure 9: Messages

Sargent-Disc Ltd
5 - 7 Baring Road,
Beaconsfield, Bucks,
HP9 2NB
Tel: +44 (0)1753 630300
Fax: +44 (0)1753 655881
www.sargent-disc.com

Report Archive

The Report Archive displays all reports that have been saved. The reports are automatically categorised into folders (*See Figure 10*).
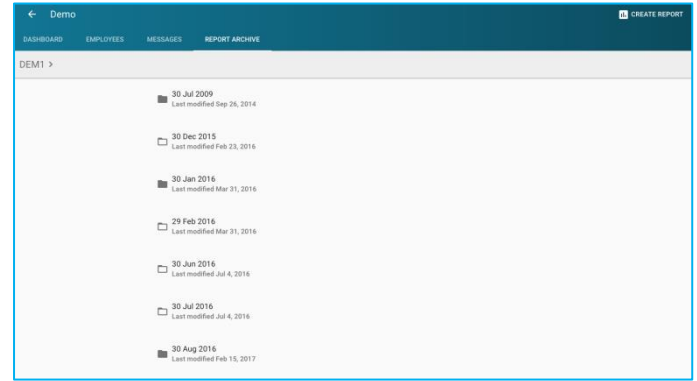

Figure 10: Report Archive

Reports

The Reports screen is split into 3 areas:

Please select the report type
This allows the user to schedule a report summary by company, by payroll or by employee.

Scheduled reports

When a report is scheduled and waiting to be processed, it will appear here.

Latest reports
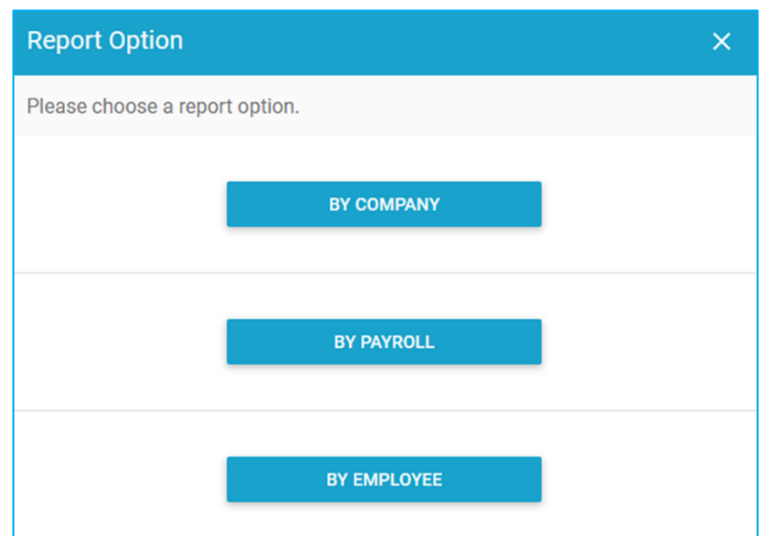When a report has been scheduled and completed, it will appear here. An email confirmation will be sent to the user.

Figure 11: Reports Main Screen

Breakdown of Summary by Payroll

Summary by Payroll
First, select the payroll you would like to report on. You will be directed to a page as shown in *Figure 12*.

On this page, you are able to select what report you wish to run:
- Days worked
- Payroll Summary

Figure 12: Reports by Payroll

Days Worked Report
When selecting the Days Worked report, you will be directed to a page shown in *Figure 13*.
If you would like to rename the report title, delete the default text within the box and replace it with your own title.
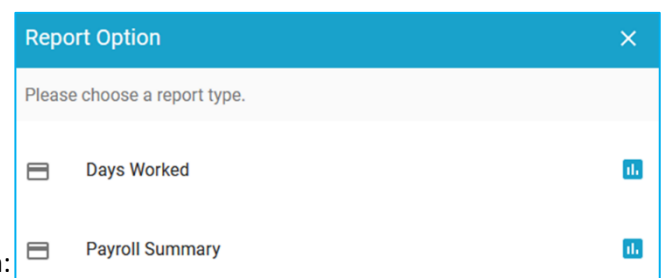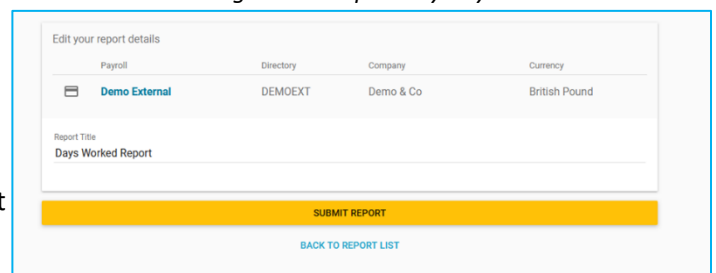

Figure 13: Days Worked Report details screen

Sargent-Disc Ltd
5 - 7 Baring Road,
Beaconsfield, Bucks,
HP9 2NB
Tel: +44 (0)1753 630300
Fax: +44 (0)1753 655881
www.sargent-disc.com

Payroll Summary Report

When selecting the Payroll Summary report, you will be directed to a page shown in *Figure 14*.

On this page, you are able to change the start and end date for the report by selecting the Date Range drop-down menu.

If you would like to change the report title, delete the default text within the box and replace it with your own title.

By default, the Order By will be set to Employee Name, if you wish to change this then select the drop-down menu and you can choose between Employee Name or Employee ID.

You will also be able to include leavers by ticking the 'Include Leavers' checkbox.

Figure 14: Payroll Summary Report details screen

Breakdown of Summary by Employee

Summary by Employee

To search for an employee, 3 filters are available to help simplify the process: Payroll, Department and Surname (*see Figure 15*).

After finding the employee(s) on whom you intend to run a report, click on their name to select them. You can select multiple employees that appear on this list by clicking on their name to select them.

Once the employees have been selected, they will automatically be added to the report generator that will be displayed on the right-hand side.

Figure 15: Reports by Employee

You will then be directed to a new page (*see Figure 16*). If you would like to add more employees, click on the employees that are displayed on the left-hand side of the screen. There is also the option to start over.

It is possible to edit Report title and Order by fields. The report is also available in either PDF or Excel format (*see Figure 17*).

Figure 16: Added Employees

Figure 17: Report Attributes

Help and Support

We hope that you find Payroll helpful and user-friendly, but if you do experience any problems, or have any suggestions on how our service could be improved, please let us know.

You can contact Sargent-Disc by email at **support@sargent-disc.com**, or visit our website: **http://www.sargent-disc.com/contact**. Telephone support is available on +44 (0)1753 639007 during office hours (Mon-Fri 08:00 – 20:00).