CleanLink Site Manager Changes for V6.11

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New Features:

Our ref: SMG-88

- **Clients, Add.** Previously, when creating a new client, it was not necessary to provide a company name. Now it is.

Our ref: SMG-113

- **Possible Leavers Report.** A new, 'CSV' output option has been added to this report, see:
  - *In Year Movements > P45 Printing > Possible Leavers Report*

Our ref: SMG-125

- **Holiday Report – in cycle.** Two new options have been added to this report:
  - Only Include zero/not paid - this will only include records where the pay value is zero or the 'Not paid' box is unticked
  - CSV format

Our ref: SMG-189

- **Backups.** The backup program has 2 new & related options:
  - Include data common to all companies
  - Backup ONLY the data common to all companies.

  In Site Manager, the root Cleanlink\Data folder is used to store shared data structures that are common to all companies, whilst the sub folders of the Cleanlink\Data folder, such as Cleanlink\Data\Data or Cleanlink\Data\Comp2 (or suchlike) are used to store data that is specific to a particular company only. Previously, whenever a backup was invoked for a company, it would include that specific company's data but not the data structures that were shared amongst all companies. This has been changed by the introduction of a new flag that specifies that this common data should be backed up also.

  For those situations where a number of companies exist, you may wish to keep an additional and separate backup of this common data, so that a restore of one particular company to a previous point in time can be followed by a restore of the common data to the latest point in

time so as not to impact on those other companies that are not being restored to an earlier point.

Important note: Some common data files, whilst shared amongst all companies, nonetheless may also hold data specific to an individual company, meaning that they cannot be restored without affecting other companies. If you need to restore data for one company whilst leaving all other companies unchanged, you are advised to contact Cleanlink Support who – providing that the appropriate company specific and common backups are available – will be able to assist.

Our ref: SMG-193

- **Staff, DBS recording.** The ability to record whether a DBS check is either Basic or Enhanced has been introduced and will show on the Staff Report as 'B' or 'E' respectively.

Our ref: SMG-194

- **Site Manager colours & fonts.** Following customer feedback, we have revised some of the colours and fonts used in Site Manager, to improve readability of text and the aesthetics of some screens.

Our ref: SMG-201

- **Warnings Screen.** In previous versions of Site Manager, this screen would automatically be displayed upon opening of the application. This was stopped following complaints from users who found it caused an irritating delay when opening Site Manager. Due to popular demand, we have re-introduced the opening of the warnings screen when first opening Site Manager – but have also made it optional, via:

- Setups > B > Formats > bottom right, warnings section - 'Open warnings on startup?

Our ref: SMG-207

- **Machines – PAT due date.** The PAT due date for new machinery items will now default to one year after the date of registration.

Our ref: SMG-211

- **Load bank holidays.** The load bank holidays program has been modified so that if there is an existing absence for that day, then a bank holiday is not created.

Our ref: SMG-219

- **Invoicing – In Cycle Report.** This report has been modified to include the quantities of items.

Our ref: SMG-220

- **Worksheets - Printing.** Time In & Time Out fields have been added to this report.

Fixes:

Our ref: SMG-92

- **Invoice Preview – Address.** Previously, when previewing invoices, those with a manual address still showed the original address rather than the manual address that was entered. This has been fixed.

Our ref: SMG-93

- **Invoice – Budget/Analysis Report.** Previously, when trying to print an image from *'Staff > Starter Info > Questions and Supporting Documents'*, - the print could come out blank as the file was automatically deleted before it had a chance to be printed. This has been fixed.
- Also – previously, a blank (empty) CSV file was created when the CSV option was not selected but Preview was selected. This has also been fixed.

Our ref: SMG-108

- **Warnings – Contract renewal.** Previously, a warning about a contract review would automatically occur when occuring within 3 months of the contract renewal date. A new facility to set your own warning period per Site has been introduced, see:

- Site Info tab, *'Warn n Months Beforehand*'. It will default to 3 months and may be changed to any period between 0 and 12 months.

Our ref: SMG-147

- **Contracted Hours screen.** Previously, when the *'Site > Contracted Hours'* screen was resized, the *'Do not use as budget in paycycle'* checkbox did not react to the screen resizing. This has been fixed.

Our ref: SMG-151

- **Staff – Printing of images from mobile.** Previously, when trying to print an image from *'Staff > Starter Info > Questions and Supporting Documents'*, - the print could come out blank as the file was automatically deleted before it had a chance to be printed. This has been fixed.

Our ref: SMG-152

- **Pension Maintenance.** Previously, users were able to change the *'Pension Type'* for a pension scheme even though it had already been used with Staff. This should not have been possible as it would cause those Staff with the original Pension Type to be cast adrift, without a 'parent' scheme to refer to. This has been fixed. It will no longer be possible to change a Pension's Type, once it has been used with Staff.

Our ref: SMG-169

- **Invoice export to Sage 200.** Previously, the invoice export could double up the values if the user 'double clicked' the Export button. This has been fixed.

Our ref: SMG-170

- **Forecast Site Margin.** Previously, if contracted hours for a site were amended, the new budget figure was not reflected in the Forecast Site Margins report until the Site > Budget screen had been viewed. This has been fixed.

Our ref: SMG-188

- **Mobiles - GDPR & new Staff.** Previously, when new Staff were imported via mobiles, the default GDPR settings were not being applied automatically. This has been fixed.

Our ref: SMG-189

- **Backups.** Previously, the backup program did not include data items that were shared commonly across all companies. This has been accommodated within the enhancements detailed above.

Our ref: SMG-196

- **Invoicing – posting of cash to sales ledger.** Previously, after viewing a preview, this screen would cause Site Manager to freeze, requiring a Ctrl+Alt+Del to exit. This has been fixed.

Our ref: SMG-203

- **Pensions extract – Now Pensions.** Previously, this extract would suppress the output of people who had never in the past been recorded as an Eligible Jobholder. This is because Now Pensions have previously rejected files containing such people. However, this may make it harder for some companies to recognise anomalous situations where they do have payments that need to be passed onto Now Pensions as recorded in (for example) the PAYE report, but which do not show up in the Now Pensions extract file.

- One such scenario where this can occur is where 'Data Take-On' records have been created in Site Manager for people who have been transferred from another system and who, at the time of transfer, were not known to be Eligible Jobholders. In this situation, contributions may subsequently be correctly taken from the Employee, but they may not be passed onto the pension company in a timely fashion because they have been suppressed from the extract until such time as they (at least on one subsequent occasion) reach Eligible Jobholder status.

- On balance, it has been decided not to suppress such records from the extract file on the basis that a rejected file gives better visibility of such issues, which can then be dealt with manually if necessary.

- In future, the Now Pensions extract will only suppress records for workers whose EEs & ERs contributions are zero or where the EEs or ERs contributions are less than zero (which typically indicates refunded contributions).

Our ref: SMG-204

- **GDPR – Purge Staff Amendments.** Previously, when using the GDPR purge facility, the Staff Amendments files were not also being purged. This has been fixed.

Our ref: SMG-206

- **Payslips – emailing.** Previously, if the Payslip format were set to Security A5, then the payslips emailed from *'Staff > Pay History'* did not have the correct pay date quoted on the pdf. This has been fixed.

Our ref: SMG-208

- **Staff Report.** Previously, the Staff report was not taking correct note of the GDPR flags, causing it to exclude people incorrectly. This has been fixed.

Our ref: SMG-209

- **Contracted Hours.** Previously, when accessing *'Site > Contracted Hours'*, a blank record was being created if no data was entered. This affected the budgets used in the pay cycle. This has been fixed – but please note:
    - This fix stops this happening going forward but it does not retrospectively remove existing blank records. This can be done be selecting the site, site contracted hours and selecting the delete option.

Our ref: SMG-210

- **Cheque report.** Previously, the cheque report was not including deductions for Attachment fees in the net amount figure. This has been fixed.

CleanLink Site Manager Changes for V6.10.2

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Fixes:

- **PDF Payslips.** Previously, the password 'option' for PDF payslips was being enforced as mandatory. This has been fixed.

CleanLink Site Manager Changes for V6.10.1

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New Features:

- **PDF Payslips.** The option to set a password on the PDF's when sending payslips from Staff Pay History has been added.
- **Hours Pad by Period Report.** This new report is accessible from both the Staff menu and Pay, Pay Reports menus. It provides the option to select a range of pay periods and gives hourly totals for each, by site.

Fixes:

- **Payslips from Site History** - Previously there was an issue whereby emails were all going to the first email address. This has been fixed.
- **Exclude from Mobile**. Previously, Staff that were marked as Exclude from Mobile were still being displayed in the mobile app. This has been fixed.
- FPS Transmissions - Previously, it was possible for purged staff to be included in FPS transmissions. This has been fixed.
- **Cleanlink Mobile app**. New staff imported via the Cleanlink Moble app will have their GDPR lawful basis of processing flags defaulted as per the prevailing Site Manager defaults.
- **Purged Staff** - Previously, fully purged Staff were still appearing in the Staff pick list screen. This has been fixed.
- **Purged Staff** - Previously, fully purged Staff were still appearing in the Staff Check report. This has been fixed.

CleanLink Site Manager Changes for V6.10

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New Features:

1. **A new 'GDPR' sub-screen on the Staff Maintain > Info screen**. This enables users to manually update new 'Lawfulness of Processing' flags for a staff record and to record and monitor staff rights on their personal data (access, rectify, erase etc)
2. The **Setups > Setups & Defaults > Defaults** screen has been modified to include defaults for the Lawfulness of Processing flags for new staff records.
3. **A new GDPR Compliance Management screen** on the main Staff screen. This will allow users to select and modify multiple staff records by changing the Lawfulness of Processing flags, partially purging the records of personal data, and/or fully purging the records of personal data.

   PLEASE NOTE: We advise you to back up your data before using this functionality, as once staff records have been purged of personal information, the only way to restore this will be from a backup, or by manually re-entering the data.

4. The **Staff Details Report** has been modified to provide all staff information to satisfy a subject access request made under GDPR.
5. The **Maintain Staff Screen** now has an 'Exclude from Portal' checkbox
6. The **Mobile > Send Data to Mobile** export has been modified with optional filters for staff who have requested restriction of processing/erasure of their data under GDPR.
7. The **Mobile > Send Data to Portal** export have been modified with new filters to only include records for staff that the 'Exclude from Portal' checkbox selected, that have not left; that have at least one of the 'Lawfulness of Processing' flags set and that personal data has not been purged.
8. **National Minimum Wage** & **National Living Wage** have been updated with a new flag to both options to allow the selection of 1 pay cycle only.
9. **Pension Extract for CPUK** - A new workplace Pension extract has been added
10. **Company Setup** - The Company setup program has been modified to disable the creation of a new Company or the deletion of an existing company**.**

Fixes:

1. **Sales Posting** - This process previously allowed an Invoice record to be deleted by using [F3]. This has been stopped

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CleanLink Site Manager Changes for V6.09

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New Features:

1. **Gender Pay Gap Reporting -** For those customers that have not already calculated the information required, there is a new report under Pay > G. Payroll Reports > AC: Gender Pay Gap Report. This will take you through a step-by-step process to extract the relevant data and generate the required calculations. Users can use these calculated values, or make their own calculations using the extracted data.

Fixes:

1. **SMP -** The Average Weekly Gross Pay - This is only calculated when the staff has been working for 26 weeks

2. **Staff Maintain -** The problem with viewing the staff starter Questions & Supporting Documents has been resolved

3. **Mobile Forms -** The extra lines being added to the bottom of a site review have been removed - you will need to resend the form to the mobiles for it to take effect.

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CleanLink Site Manager Changes for V6.08.2

Fixes:

1. **Staff Maintain** - Sometimes when adding new staff with P46 information the tax code was being incorrectly set. This has been fixed

2. **E Regular Pay Re-build -** The re-build was not correctly handling the Rolled up Holiday flag when it had been set. This has been fixed.

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CleanLink Site Manager Changes for V6.08

Important – Payroll Operators: 2018/19 Statutory Release.

This release provides the necessary End of Year Cleardown functionality for the 2017/18 tax year and implements the legislative changes needed for continuing payroll operations into the 2018/19 tax year. It provides updated parameters, thresholds etc., for PAYE/NI/Pensions/NMW & NLW.

For detailed guidance on the End of Year Cleardown process, please see our videos:

End of Year Cleardown video

NMW/NLW uplift explanatory video

There is also an accompanying document detailing the processes: see… \Cleanlink\Crib Sheets\CLEndOFYear.pdf

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New Features:

1. **End of Year Clear Down message screen.**

A new message screen has been introduced to remind users to not open cycles in the new tax year without previously having ran the relevant end of year clear down. The first cycle(s) of a new tax year can only be opened after the message has been acknowledged.

2. **Staff Starters & Previous Loan screens.**

These screens have been redesigned to make it easier & faster to find and view staff information.

P45/P46/Student Loan data has been moved to the Previous/Loan screens.

Past Employers / Questions & Supporting Documents / Signature information remains on the Starter Info screen

Previously the Data from Mobiles/Questions/Signatures was only available via a separate button press in Staff > Starters, making this screen laborious and cumbersome to work with. This is now replaced by 3 distinct tabs which will show these data without a separate button press, allowing you to navigate the staff list quickly, whilst viewing the data for each corresponding person.

The data for Live/Left workers has also been separated into different files to keep the live file as small as possible, which together with a new check box that can be used to optionally display the images, means that this screen isn't slowed down unnecessarily by the display of images for people who are not of concern, which will dramatically improve the responsiveness of this screen for customers with lots of documents/images.

3. **Clients > Overview Report.** The option is now available to include inactive Sites in this report.

4. **Pay Cycle > Amendment Log.** The option is now available to export this report to csv.

5. **Query, Information Search.** The option to output to csv has been added to option 1 of this program.

6. **Paper Paysheets.** The option to print an additional number of blank lines per site has been added to the printing paysheets program. If left zero, the current defaults will continue to be used.

7. **Pay Cycle > Hours Screen > Absence Notes.**

The ability to edit notes for absence when entering via the hours screen in the Pay Cycle has been added. The notes entered will be reflected in the Logged Absences screen and the Holiday Log report.

8. **Machinery.** New machinery items now have the cost per week set as the default for that machinery type.

9. **Invoice Export**. A new accounts package type has been added for Quick Books Online ('QB Online'). When set, the invoices/credits are exported in this new format. QBO cannot accept invoices and credits in the same file and so it has been necessary to export these as two separate operations.

10. **FPS Transfers**. Previously, if no response was received from HMRC the transfer suspends and can be picked up later. This has caused confusion with users, sometimes resulting in an FPS not being sent.

Typically a no response occurs for one of 2 reasons:

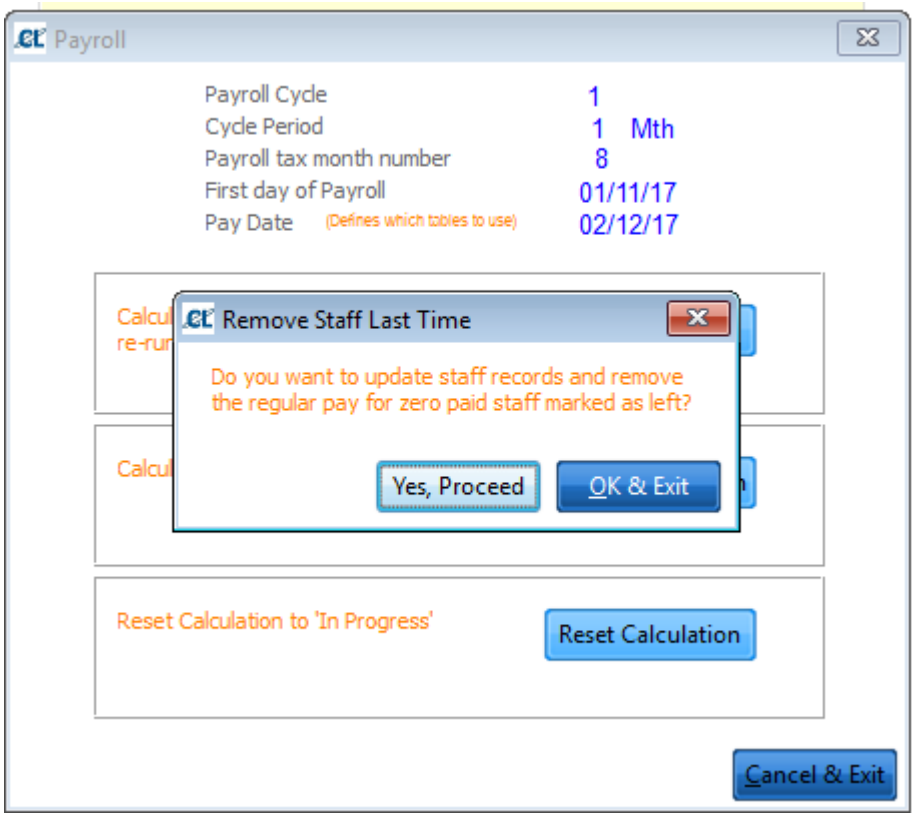
1) The link to HMRC cannot be established
2) HMRC is busy and failed to respond in the time we allow (approx 8 mins)

The program has been changed so that if there is no response the transfer is **cancelled** and an entry in the XML History type 'Send Fail' created. Such failure types will of course not have an XML response file attached. .

11. **Mobiles, Send data to all mobiles**. An extra prompt to continue has been added for confirmation that this process should be run, with a warning message given that it may take some time.

12. **Payroll - Zero Paid Staff - Last Time.** Previously, if staff are marked as leavers in a cycle, but they had zero pay, this was lost at calculation time.

To correct this a further prompt has been added:



If 'Yes, Proceed' is selected, then the staff leaving date is set and their regular pay is removed.

Fixes:

1. **Regular Site Pay.** Previously, staff without the Senior Right were still able to view the Regular pay for senior staff via Site > Reg Pay even though those Senior staff not correctly not visible to them via Staff Maintain. This has been corrected with the removal of the totals on the first screen and the second screen changed to not display column totals if senior staff are found.

2. **Mobile Forms**. Previously, when in the Mobile tab and Forms, amending the 'Order' column in the Clauses had no effect in re-sequencing, either there or when having been sent to the mobiles. This has been fixed.

3. **Partial Calc Screen**. Previously, the incremental search facility did not work in this screen. Incremental search is where typing successive characters locates incrementally towards

records corresponding to the characters typed so far. This has been fixed.

4. **Pay > Staff at Site.** Previously, when clicking the Staff at Site button for a Site without Staff, an endless loop would occur. Attempts to leave the screen would result in a "Staff Member does not exist" error, leaving you no alternative than to kill the runaway task via Task Manager. This has been fixed.

5. **Hours comparison report.** Previously, Sites with hours entered in Cont Hours for the current cycle were not being included in the Hours Comparison Report (weekly Totals). This has been fixed.

6. **Maintain Staff – Browser (spreadsheet) Format.** Previously some of the columns had incorrect headers & descriptions. This has been fixed.

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CleanLink Site Manager Changes for V6.07

Important - Changes to the Government Gateway:

secure.gateway.gov.uk

The Government Gateway developed in 2002 is nearing end of life and will be decommissioned on 14th February 2018. It will not be able to accept submissions (e.g. RTI FPS) from this date.

They have developed a new version for Document submission via a new transaction engine, available at a new URL:

https://transaction-engine.tax.service.gov.uk

Cleanlink Site Manager v6.07 implements this URL change.

Please note: If you have implemented any specific Firewall restrictions governing your external communications, please ensure that you revisit them and make the necessary amendments to accommodate this new URL endpoint.

Fixes:

1. Pay cycle > Adding Cover staff, Pay Rate not picked up. Previously, when adding cover staff to a site in the pay cycle (Staff with no regular pay for that site) you could add hours but it did not pick up a default pay rate from Staff/Site/Company. To be able to pay the employee you had to manually enter the pay rate. This has been fixed.

2. Pay > Pay Cycle > D. Timesheet Import (Spreadsheet Format). Previously, Holiday Pay was occasionally being incorrectly shown as a non-contracted day. This has been fixed.

3. MITC interface - Changes have been made to correctly interpret Staff Check Codes and the Date Format

4. Setups > K. Payroll Cycles, Pay Items.

Previously, when Pay Item 'REG1' did not exist, it would be automatically created. However, the Site column was not also being set and it not maintainable by users. This has been fixed.

5.Sage Micropay. A new Gross export format has been created.

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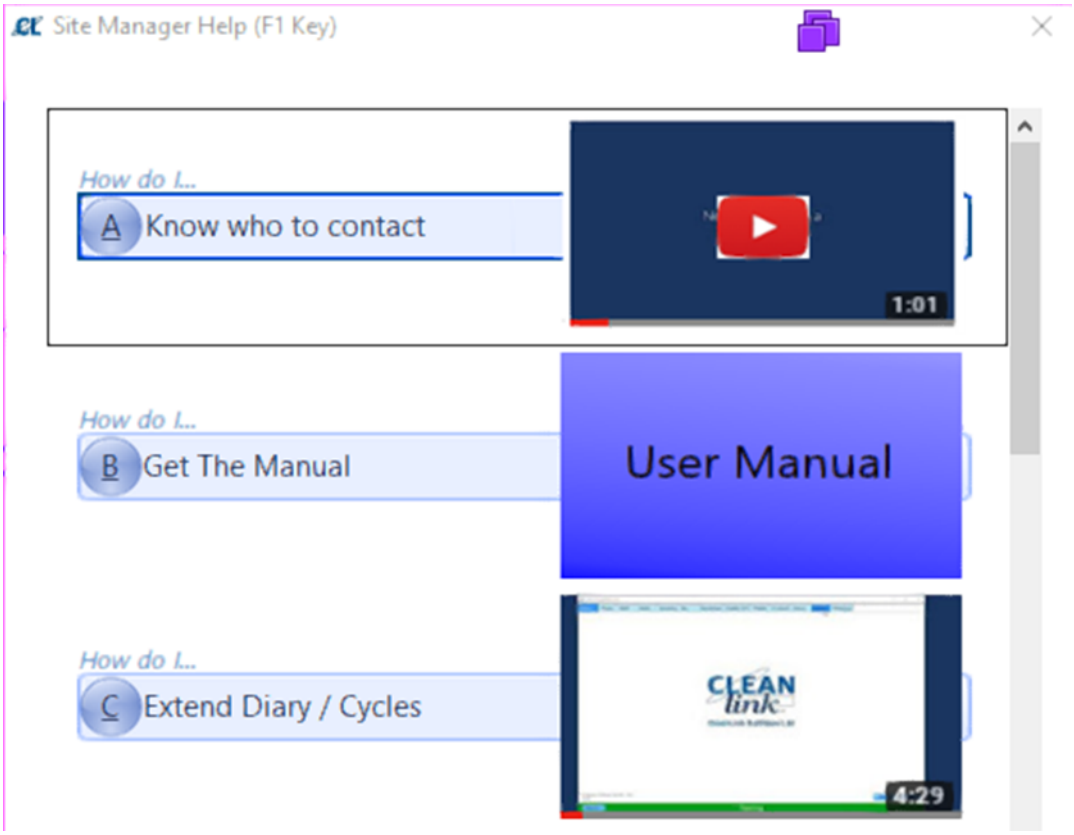
CleanLink Site Manager Changes for V6.06

New Features

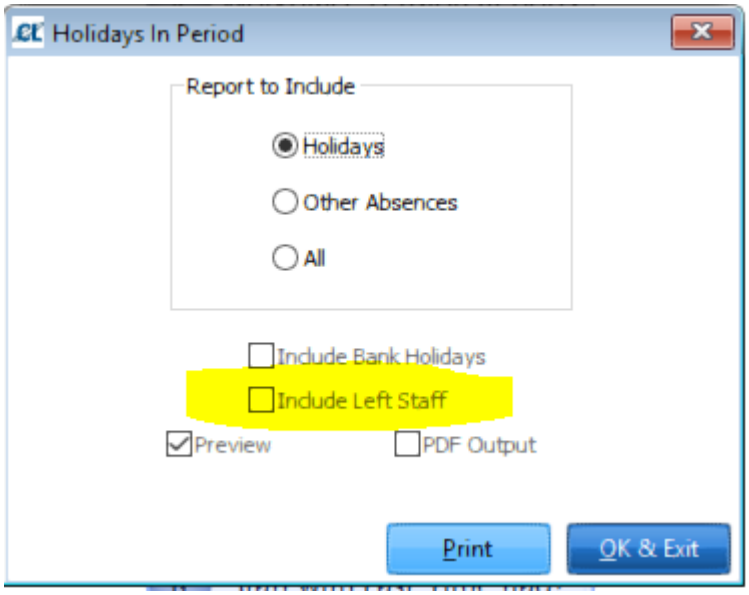
1. **How To Videos –** A range of videos has been introduced to provide instructional 'walk throughs' of how to perform particular tasks within Cleanlink. They are available from anywhere via the **F1** key or from the main screen via the '**How do I…**' button. They will open in your own web browser, so you can have them play whilst you follow the steps within Cleanlink. Don't forget to have your sound turned on!



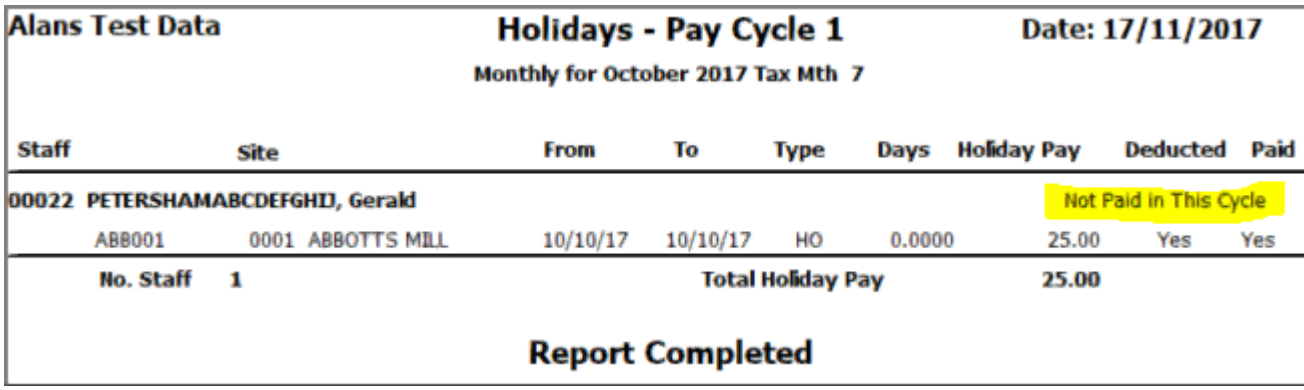
More 'How to' videos will be added in future releases.

2. **Adding machinery to a Site via a Mobile** - The mobile app includes the option to add machinery to a Site and this data can now be imported into Site Manager. Please see Cleanlink\Crib Sheets\Adding machinery to a Site from a mobile.pdf for more information.

3. **Holiday reporting**: ***Pay Cycle > Reports > X. Hols / Absence in Period*** – Previously, this report would automatically pick up past leavers. It has now been changed to only do this if the option to '**Include Left Staff'** has been checked. They will also be identified on the report.



Also, when the **'Include Left Staff'** option is checked, a message has been added to the report where Staff have Holiday but they are not being paid in the current cycle:



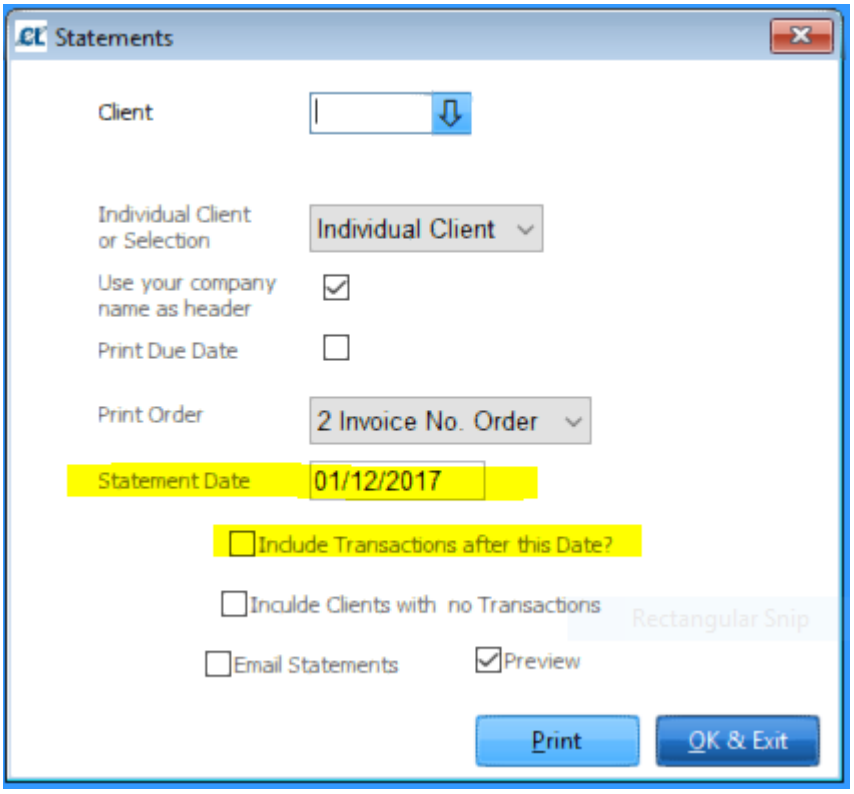
Alans Test Data — **Holidays - Pay Cycle 1** — **Date: 17/11/2017**

Monthly for October 2017 Tax Mth 7

Staff	Site	From	To	Type	Days	Holiday Pay	Deducted	Paid
00022 PETERSHAMABCDEFGHIJ, Gerald						Not Paid in This Cycle		
ABB001	0001 ABBOTTS MILL	10/10/17	10/10/17	HO	0.0000	25.00	Yes	Yes
No. Staff 1				**Total Holiday Pay**		**25.00**		

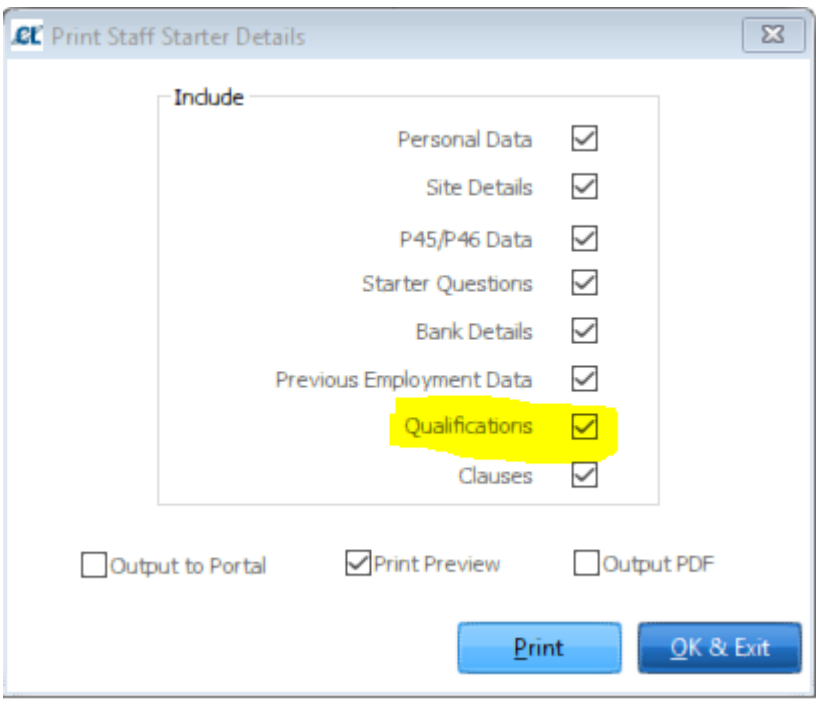
Report Completed

4. **Invoicing *> L. Statements*** – To better satisfy the needs of Clients that require a Statement denoting a balance due as at a particular date, a new field 'Statement Date' together with a checkbox 'Include Transactions after this Date?' has been added:

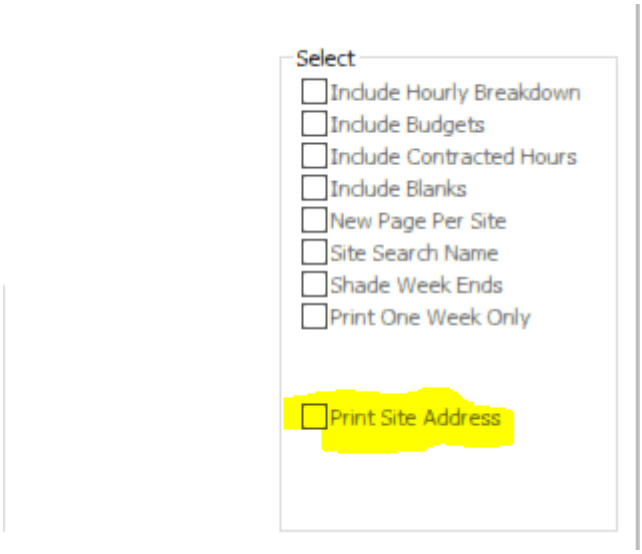


5. **Emergency Contacts –** Have been added to Staff Maintenance, Staff Report and New Staff from Mobiles, to enhance what was previously only 'next of kin' recording.

6. **Staff Starter Details print** – A new tick box option has been added to include the Qualifications on the staff starter details print.

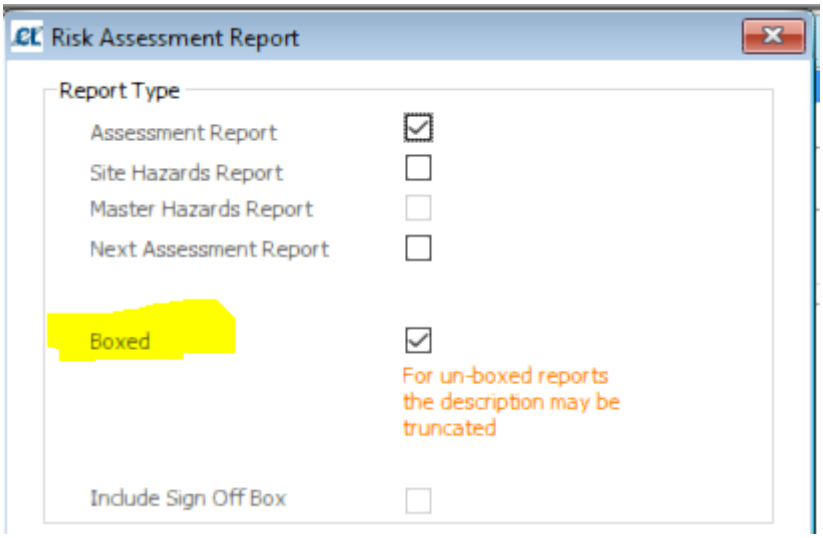


7. **Regular Timesheets: Pay > B. Regular Pay Sheets** - An option to print the Site Address has been added to the printed regular Site timesheets. If selected, the Site Address prints 1 line below the Site name.



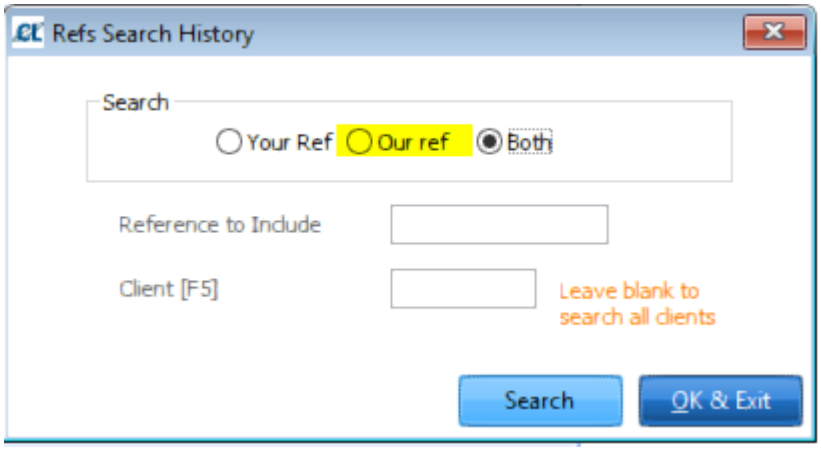
8. **Clients > I. Management Reports > C. Starts & Stops** - A new option has been added to allow the inclusion or exclusion of 1 off Sites.

9. **Risk Assessments: Maintain Site > RA > Report > Boxed (tick box)** – An extra option 'Boxed' has been added to the report selection. If ticked the report as current is produced. If not ticked, then a single line per assessment is produced.

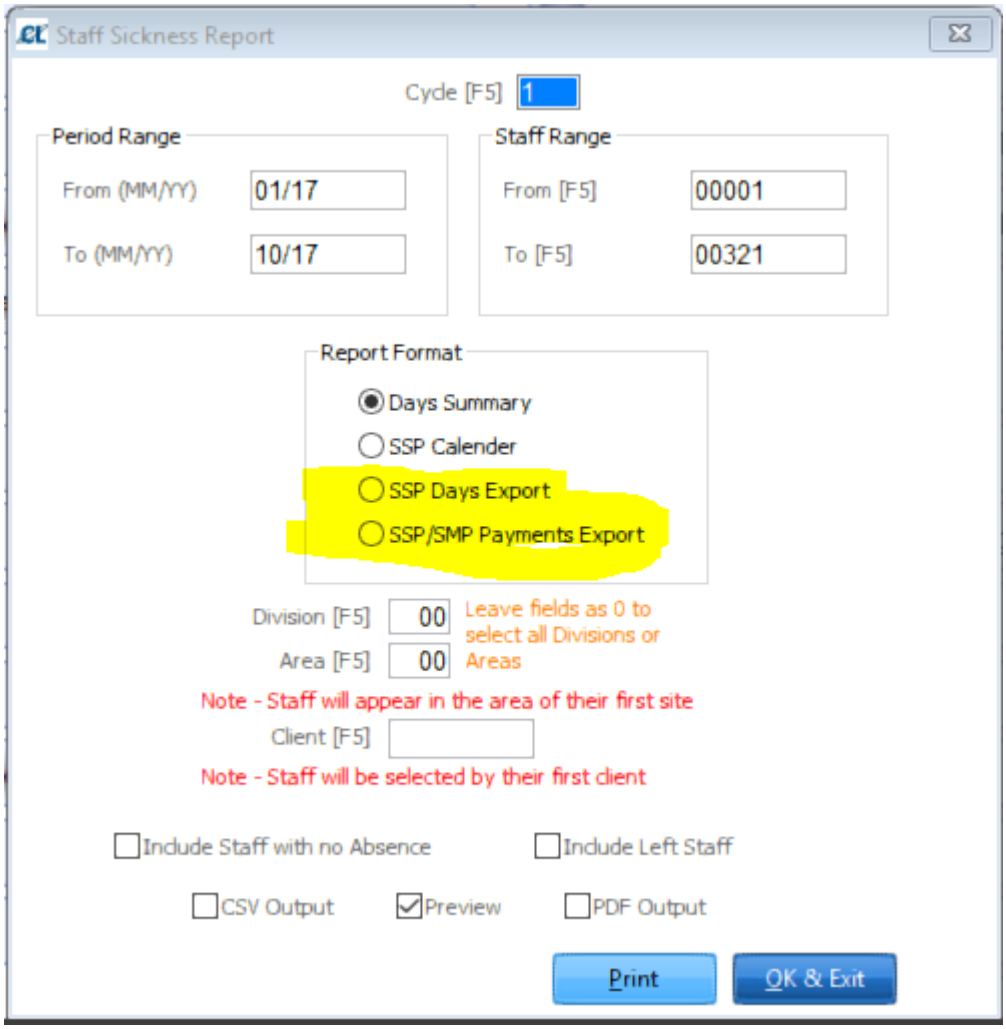


10. **Site notes sent to Mobiles: Client > Maintain Site > Notes - Site Notes field –** This has been extended to allow notes of up to 2000 characters to be sent, where the Type is set to 'M'.

11. **Query > I. Invoices by Reference** – This has been enhanced to allow searching by 'Our ref':



12. **Staff > H. Payroll Report > H. Staff Absence Report –** Two new selections have been added to the Staff Absence report: SSP Days Export and SSP/SMP payments Export:



Fixes

1. **FPS CSV extract** – Previously this report did not state where it had exported its extract file to. This has been fixed.

2. **Site Notes: Maintain Site > Notes / Maintain Clients > Client Notes** – Previously, the Sites Note log was printing the Site Address even if selected from the Client tab. This has been changed to print the Client address if selected from the Client.

3. **QC Report Visits with Full Case History & PDF Output ticked** – Previously this would cause Cleanlink Site Manager to crash with a mgaxparuntime error. This has been fixed.

4. **Anomalies report** –Previously, when this report was ran from a Closed cycle it would give inaccurate figures for Holiday days taken over accrual days. To prevent this, the holiday checks have been removed from this report if it is being ran on a closed cycle. Please note that this report is designed to detail anomalies in the **currently open cycle** to enable

detection & correction of anomalies **before** a person is paid, Nonetheless, its use is not restricted solely to open cycles because we know that some customers still find it useful.

5. **Pensions – Nest & TPP contribution schedule extracts –** Previously, these exported files did not contain a leaving date when a leaver was marked as such in the current pay cycle via the 'Last Time' flag, either pre, or post closing of that pay cycle. This has been fixed.

6. **Pensions – Percentage of Gross type** – Previously, the YTD and all time cumulative contribution figures for staff with Percentage of Gross pension types were not being updated. A rebuild of Pensions YTDs corrected it, but this was needed each time. This has been fixed.

7. **Regular Worksheets "Select a Template" button** – Previously, when creating/amending a Regular Worksheet the "Select a Template" button had no effect. This has been fixed.

8. **Holidays** – Previously, when booking holidays through Staff > Holidays > Log Holidays it was possible to pay staff twice for the same day(s) if the holiday dates overlapped with other bookings. This has been fixed.

9. **Warnings** – Previously, if the Warnings screen was set to automatically open (via the 'Regular Display of Warning' checkbox) after the 'Display Interval in Minutes' elapsed time had expired, it would open and fill whatever screen/box the user happened to be on at that moment. This could result in the Warning screen not fitting into the space available for it and in such cases, any attempt to scroll through the screen caused it to disappear. This has been fixed.

10. **Stock Order History** – Previously, when emailing a Purchase Order rather than a delivery note, the email header and attachment file name used the Delivery note number rather than the PO number, leading to possible confusion with the supplier. The following changes have been made to ameliorate this:
    a. We have changed all document formats to print the **Issue ref** as our ref. If the document is printed as a Purchase Order, then an extra reference PO Number has been added.
    b. We have changed the header message to denote if it is a delivery note or a purchase order being printed with the relevant reference and Site name
    c. We have changed the filenames of the created PDF's to either be DNxxx or POxxx according to their type and amended the email title accordingly.