

Payroll Batch Automation

Description: In this topic, the user will learn about payroll batch automation. The batch automation process includes the steps Validate, Process, and Approve. Click the green Validate or Process button to start the process and be prompted for a payroll batch automation decision. See alert screenshots below.

*Please note: This feature is an instance-level setting. Submit a support ticket to enable it.

Role Required: Super User, Payroll Team

Permission Required: N/A

1. If negative paycheck validation is Active the first step will be Validate. Proceed to step 2. If negative paycheck validation is Inactive the first process will be Process. Proceed to step 3.
2. Click **Validate** then **Yes** to confirm batch when prompted
 - a. The alert window will populate asking "Would you like the system to automatically process and approve this batch when validation is complete?"
 - i. Click Yes to start the payroll batch automation
 - ii. Click No to decline the payroll batch automation process and proceed manually
3. Click **Process** then **Yes** to process batch when prompted
 - a. The alert window will populate asking "Would you like the system to automatically approve this batch when processing is complete?"
 - i. Click Yes to start the payroll batch automation
 - ii. Click No to decline the payroll batch automation process and proceed manually
4. The payroll batch automation will automatically run through the steps Validate, Process and Approve if automation was selected. Proceed with other tasks within DCI while payroll batch automation runs.
 - a. If messages templates Processed or Approved are Active, the user will receive a message and optionally a notification, when the step is completed OR
 - b. **Refresh** the browser to update the batch processing status
5. When the payroll batch automation is complete, the status changes to Transmitted
6. Batch processing is now complete, proceed to the Reconcile step if needed
7. Optionally, view the payroll batch automation decision details on the batch details page by clicking the events tab
 - a. Subject column - Batch Automation Confirmed or Batch Automation Declined
 - b. Added By column - The name of the user who made the decision



Would you like the system to automatically approve this batch when processing is complete?

No

Yes



Would you like the system to automatically process and approve this batch when validation is complete?

No

Yes

Related articles

- [Payroll Module - Admin Guide](#)
- [What is a payroll entry?](#)
- [What are previously paid entries?](#)
- [April 2023 Release Notes](#)
- [Payroll Batch Automation](#)